September 2003

Ontario Literacy Coalition

# BULLETIN

ONTARIO LITERACY COALITION

*Status of Workplace Literacy in Canada, the UK and the USA*

*Research Studies & Methods*

*Innovative Programs & Materials*

# Workplace Literacy

## National and International Perspectives on Research and Practice

BULLETIN

# Workplace Literacy

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# Acknowledgements

The Ontario Literacy Coalition (OLC) acknowledges the support of the National Literacy Secretariat in funding the development and the distribution of this special workplace bulletin. The OLC particularly thanks Brigid Hayes for accepting the proposal, helping us with national contacts, and giving us the latitude to develop an expanded international issue.

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# Introduction

THE PURPOSE OF THIS BULLETIN was to create an awareness of workplace literacy for the literacy community in Ontario. We wanted to provide an overview of the kinds of activities that were taking place across Canada in the areas of research and practice.

The bulletin was a small idea that grew. Before we knew it, we had doubled the number of contributors that we had originally planned for, and had gone for an international perspective! Our intention in expanding the bulletin was to provide those interested in workplace literacy with the bigger picture, to spark ideas and imaginative leaps, and to make connections across oceans.

In this bulletin, we have focused on three areas:

1) the status of workplace literacy in Canada, the UK, and the USA;
2) research studies and methods that examine different aspects of workplace literacy; and
3) innovative programs and materials that have contributed to the depth and breadth of the field.

Each section of the bulletin offers ideas and practices that challenge assumptions, reflections on theory and practice, and future directions.

Articles vary in their scope and their length. Longer articles survey the field in a country, state or sector or offer a detailed account of a research study. Shorter articles focus the lens on a specific program, materials development project or smaller scale study.

We hope that the variety of initiatives in this bulletin provides you with food for thought, new perspectives, and more questions about the nature of workplace literacy.

Sue Folinsbee
*Acting Co-Executive Director*
*Ontario Literacy Coalition*

August 2003

SECTION 1

# National and International Perspectives

# Workplace Literacy — A National Update

BRIGID HAYES

Adult learners learn best when the learning makes sense for their own realities. Adult literacy practitioners have understood that motivations for adult learners are key to understanding how best to respond to learners' needs. For the most part, literacy programs are able to assess and respond to their learners' contexts based on their direct relationship with the learner.

But what about those learners who do not have an exclusive relationship to the literacy practitioner? What happens when literacy issues come to the fore as a result of other, non-learning issues? This very question is one that has preoccupied the National Literacy Secretariat (NLS) of Human Resources Development Canada since its inception. In 1988, the federal government established the NLS as a focal point for literacy activities, understanding that literacy was everyone's concern. It was clear that there is a relationship between literacy and many other social and economic issues. For this reason, the NLS has worked with voluntary organizations whose mandate is not literacy but whose clients or issues touch on literacy. For example, ex-offenders or social service clients may have literacy challenges but their main relationship is with a non-literacy voluntary agency. Working to assist these agencies and organizations to understand literacy issues and to be positioned to respond to their clients' needs has been a critical aspect of the NLS' work. In the same vein, efforts around plain language and design, and integrating literacy into training of professionals in the medical and justice systems have also contributed to this effort.

## Factoring Literacy into Workplace Operations

Another key target group of the NLS has been business associations and labour groups. Again, the model is similar to that of the work with non-literacy organizations. The goal of the NLS' efforts has been to enable these groups to factor literacy into their operations, whether from the point of view of employee/worker training, client service, or communications. We have learned over the past 13 years that responding to literacy needs in the workplace and of workers is not a direct application of traditional adult literacy practice.

First, there are several more players involved, including management and the union, in addition to the learner. The workplace literacy practitioner must manage these relationships in a balanced and unbiased fashion. This is not as easy as it seems. Often, practitioners feel that their 'client' is the learner and so will ignore or overlook the issues raised by the other stakeholders. Occasionally, practitioners will see their primary responsibility to the employer, who is paying the bill, and not deal with other stakeholders with the same level of engagement. Other practitioners come to the workplace with little or no experience with unions or a negative attitude towards unions, not understanding that this

will cause issues in the implementation of workplace literacy programs.

Second, the stakes are often much higher in a workplace situation. Jobs can be won and lost based on identification of literacy challenges, success at responding to those challenges, and the overall attitude of the workplace (co-workers, supervisors, managers) to workplace literacy learning.

Finally, the issues that may have brought the literacy concerns to the forefront are often specific or specialized workplace concerns that may be beyond the experience of the adult educator. The introduction of ISO certification, adherence to HACCP regulations, WHMIS certification, and SPC processes will often result in workers and employers noticing literacy issues. The use of the acronyms in the previous sentence is deliberate. These acronyms belong to the world of work, and understanding their impact and their importance should be second nature to the workplace literacy practitioner.

## NLS-Supported Projects

Across the country, the NLS has been fortunate to be a partner in exciting projects that help workplace literacy practitioners deal with these issues. The Canadian Manufacturers and Exporters — British Columbia Division is working to develop a model of inclusive workplace training for real participation through team processes in a Continuous Improvement (CI) or Lean Manufacturing environment. Ultimately, the CME — BC will be offering the tools developed through this project to its members across the country.

In Alberta, the Alberta Food Producers Association (**http://www.afpa.com/iww/**) has developed an approach to integrating literacy into HACCP training and procedures (HACCP stands for Hazard Analysis Critical Control Point, which assures that food is handled properly). As a result of this project, the AFPA has been able to introduce a learning culture to its industry and recently was able to secure a $3 million training fund.

In Nova Scotia, Workplace Education NS has developed a curriculum based on ISO (ISO stands for the International Organization for Standardization which develops standards for business, industry, and government) as well as a brochure aimed at the business community to make the link between obtaining ISO certification and literacy. Another innovative NS project is a curriculum for patient care workers who must pass a certification in dealing with patients with dementia. This curriculum is offered in both English and French.

The United Food and Commercial Workers Union, Locals 175 and 633 have developed an on-line course, "Introduction to the language of ISO 9000: A self study guide." As a required certification, WHMIS (Workplace Hazardous Materials Information System) and SPC (Statistical Process Control) have been other means by which literacy challenges in the workplace have been revealed.

## Business and Labour Promoting Workplace Literacy

As well, we have been able to work directly with business and labour organizations to help pave the way for the introduction of workplace literacy activities. Workplace literacy is more than just offering classes. It is based on a changed relationship in the workplace to learning. Often, those who lack these skills have not been afforded the opportunity to learn. For some employers, literacy is an issue that should not fall within the purview of the workplace. The Canadian Manufacturers and Exporters — Ontario Division is completing a manual

which will make the case for business to become involved in literacy, while the Conference Board of Canada (**http://www.conferenceboard.ca/education/**) is preparing its latest publication on Overcoming Barriers to Workplace Literacy Programming. Having these employer associations provide leadership is critical to achieving buy-in from business.

The Canadian Labour Congress (**http://www.clc-ctc.ca/web/menu/english/indexeng.htm — look under "Organizing" then "Literacy")** has been instrumental in coordinating and providing support to labour activities across the country with a regular newsletter, courses on union-based literacy and plain language, support to the development of clear language contracts and resolutions, and the integration of literacy into labour education programs.

## *Resources Online*

These are but a few of the recent projects supported by the NLS. There are so many more projects, exciting ideas, and tools to be reviewed. One of the most critical issues for the workplace literacy practitioner is how to find out what is going on and who is doing what. Some of the key resources for information are:

1. NLS projects funded — this is complete up until March 31, 2002 and is keyword searchable — **http://www.nald.ca/nls/nlsfund/projects.htm**
2. NLS library — all products from NLS projects are housed in the NLS library and can be accessed via inter-library loan — **http://www.nald.ca/nls/inpub/inpub.htm**
3. NLS website — our site has links to IALS, a number of fact sheets, and publications — **http://www.nald.ca/nls**
4. The NALD site itself is a veritable wealth of information — **http://www.nald.ca**. Many of the provincial and territorial workplace literacy efforts have websites housed on NALD (look under "Provincial and Territorial Organizations"). You might want to check out the Literacy BC, Workplace Education Manitoba, WWESTNET, Workplace Education PEI, and the Workplace Education Newfoundland sites, just to name a few. Also, under "Full Text Documents" there is a separate section on workplace literacy.
5. There are a few international listservs that deal with workplace literacy. From the National Institute for Literacy, there is the NIFL-WORKPLACE Forum on Workplace Literacy, which you can sign up for via NALD. The Workplace Basic Skills Network at the University of Lancaster in England has an e-mail update list which I find interesting — **http://www.lancs.ac.uk/wbsnet**
6. Contact me at: **brigid.hayes@hrdc-drhc.gc.ca** or 613-957-9845.

**Brigid Hayes** is Program Manager, National Literacy Secretariat, Human Resources Development Canada.

# Learning in Solidarity: A Union Approach to Worker-Centred Literacy

TAMARA LEVINE

Unions in Canada have a long track record of being at the forefront of creating learning opportunities for workers and families. Despite employer resistance and provincial cutbacks, Canadian unions are developing a holistic and democratic vision and practice of worker-centred literacy that is emerging as a significant presence within the adult education field.

For unions, literacy is an opportunity to reach out to some of those largely "inactive" members who want to improve their skills, who may have had to leave school early or for whom school didn't work out the first time. Literacy training may also be of interest to workers whose skills have become rusty because they haven't had to use them for many years, or for immigrant workers who need to improve their skills in English or French. Literacy also provides unions with the awareness and a set of tools to help look at how we can work to make our programs and communications more accessible and inclusive for all our members. Ultimately, it is about democracy, about sharing the skills for participation and about working towards making sure the face of the union reflects the members it represents.

## Learning and Change: A Classroom Example

Here is an example of what can happen in a real-life classroom when literacy is understood in its fullest sense — as the exercise of critical reflection and action, both individual and collective.

A group of night cleaners were participating in a literacy class that their union had negotiated with their employer. One night Michel, a participant, came in with his hand in a bandage. He had cut himself on a rusty metal garbage can. His co-workers all knew about the problem with the garbage cans, as others had been hurt in recent months. Although they had raised the issue with the supervisor, nothing had been done.

Giselle, the instructor and a co-worker who had been trained by her union, understood the situation well. After all, she was a cleaner on the same shift. She seized the opportunity to help the group find a way to deal with the situation, starting in their workplace literacy program. She asked Michel and the other participants about their experiences with workplace injuries, writing key words and phrases on the board. They talked about what they could do about the problem of rusty garbage cans.

The clauses in their collective agreement dealing with safety on the job became a reading exercise as the group worked together to understand the difficult terms and rewrite the clauses in clear language. Together, they decided to write a letter to the health and safety committee to raise the issue. They discussed what should be included in the letter, and reviewed several drafts. They would refer to Michel's accident, indicate how long the problem had been going on and suggest a solution: the replacement of the garbage cans. Ultimately,

the letter was sent on behalf of the class and the rusty cans were replaced with plastic ones.

This process took place over several weeks, in between other learning activities. The tasks and skills came out of the reality of workers' experiences. The process went beyond looking at an individual situation and linked it to the larger collectivity — co-workers and fellow union members. It helped the group work towards an understanding of how decisions are made and where change is possible by dealing with the systems surrounding an actual incident. This way of learning not only helped the participants understand these systems better, but it engaged them in a process of how they could stand up for themselves to effect positive change.

"Often, it is this system level, the broader context of how our world works, that is ignored by mainstream literacy definitions and practices. Yet it is only when we include literacy skills for dealing with this kind of activity that we can claim to be developing literacy for democratic participation, indeed, for citizenship" (CLC, 2001).

## A Worker-Centred Approach

Over the years, Canadian unions have developed a checklist to guide the development of our programs. This is the framework within which we talk to one another and the package we present to employers.

Worker-centred learning:

1. builds on what workers already know;
2. addresses the needs of workers as whole persons;
3. enables workers to have more control over their lives and jobs;
4. involves workers in decision-making;
5. reflects the diverse learning styles and needs of adult workers;
6. is developmental;
7. looks to integrate literacy with other aspects of workplace training;
8. assures confidentiality;
9. is open to all; and
10. is accessible.

## The Workplace as a Venue

Union literacy programs build on the sense of community that many people develop on the job. This can help sustain workers for whom it is often very difficult to "go back to school." Schools have a special way of coding, storing and transmitting knowledge, a way that many union members have found alienating and exclusionary. Furthermore, there are not always appropriate programs available through the community college, school board or community-based program. Most significantly, life gets in the way: shift work, child care and other family responsibilities, transportation, and physical exhaustion. Many unions know that if they can negotiate favourable conditions for worker-centred education, the workplace can be an important venue for learning, because it is convenient, especially if the classes take place at least partly on work time.

However, just because the program takes place in the workplace doesn't mean that everything that goes on in the class has to come from the workplace. In fact, the learning will happen more effectively if the materials and content come from the range of activities and interests of the workers, whether from work, home, the union or the community.

## Countering the Productivity Argument

Union literacy is growing just as employers across Canada are becoming increasingly aggressive in cutting back and contracting out, in pushing for de-regulation and for privatization. These aren't easy times to develop democratized learning programs, when so many workers are feeling stressed and insecure on the job.

Too often literacy is framed as a remedy for the ills of the workplace, whether we're talking about industrial accidents or low productivity, problems that we know are caused by a multitude of factors. Unions have grave concerns when workers get blamed for these ills. Too often workplace literacy programs are defined in narrow terms. Sometimes referred to as "competency-based," the training offered is limited to the skills needed for the job the worker is currently performing or to boost productivity. This kind of training is inferior because it is neither developmental — building a foundation for further education and training — nor portable.

Employers tend to get involved in literacy to boost the bottom line. Unions, on the other hand, get involved to enhance workers' lives, to strengthen the union, to improve the workplace, believing that successful workplace literacy programs have to be centred around the needs and aspirations of workers.

## A Cultural Revolution in the Workplace

There is clearly a double standard operating in most workplaces. People in management, technical and administrative jobs have fairly ready access to training, usually at the employer's expense and on the employer's time. Not only do workers at the bottom have little or no access to workplace learning, but their motives are often challenged. At the same time, both employers and unions are learning how rapidly the workplace is changing, and how much there is to be gained by investing in the workforce at every level. Promoting union-based literacy, then, means taking on these attitudes — struggling for respect — and challenging the practices that reflect and reinforce them.

Workers who have the opportunity to participate in a worker-centred literacy program generally develop increased confidence and skills. They can usually communicate better with co-workers, supervisors, the public and customers. They can understand written instructions better, deal with new material more easily and work more independently. They are more likely to participate in further training and education. They will likely feel more valued as an employee and make a more significant contribution to their organization.

At the same time, they will probably feel more confident about helping their children with their homework or participating in parent/teacher meetings. They will have a better sense of their rights as workers and citizens. They will be more likely to stand up for themselves and their co-workers, and they will probably ask more questions. They may become more involved in the union and in other aspects of their community.

Potentially, the workplace, the union and the worker all have much to gain. Nonetheless, the management and the union won't necessarily have easier lives when previously disenfranchised workers begin to taste the newfound skills and openings of spirit that a good literacy program can provide. A more empowered worker isn't always going to toe the line, either on the job or at the union meeting.

## The Role of the Union

Increasingly, unions are seeing the potential that can come out of their involvement in literacy. Many national unions across Canada as well as provincial and territorial federations of labour have launched their own literacy initiatives in recent years. They are promoting awareness of what literacy means and its potential to strengthen the union. They are putting literacy on the negotiating table, and achieving favourable ways and means for workers to learn basic skills at the workplace and at union training centres. They are training union representatives on joint committees to understand their role and to work towards high quality worker-centred programming.

The Canadian Labour Congress (CLC), for its part, launched its Workplace Literacy Project in 1996. It provides co-ordination and technical support to affiliates, and develops literacy and clear language resources through its Learning in Solidarity series of publications. Through the CLC Literacy Working Group, it brings union co-ordinators together to share ideas, tools and encouragement.

## Learning for the Future

There is still a long way to go. Unions need to continue to hone a labour vision of workplace literacy, and find ways to support how the vision gets realized in practice. We need to push literacy up on our bargaining agendas, knowing that gains made in bargaining will not only benefit union members, but will often have a positive ripple effect into unorganized workplaces. We need to work with literacy and social justice organizations to push the envelope of public policy at both the federal and provincial levels so that adult education is not relegated to being a charitable enterprise but is entrenched as a right. We need a publicly supported system of life-long learning. We know that literacy work is not a quick fix. It takes creativity and stamina to pursue an agenda of this kind of "learning in solidarity."

## *References:*

CLC. (2001). *Seeds for Change: A Curriculum Guide for Worker-Centred Literacy.* Ottawa: Canadian Labour Congress.

This article is an abridged version of the original which appeared in *Just Labour*, vol. 1, 2002. The original, full-length version can be found at **www.justlabour.yorku.ca**.

**Tamara Levine** is the coordinator of the Workplace Literacy Project of the Canadian Labour Congress.

# Literate Cities Project: Canadian Association of Municipal Administrators

PATRICIA NUTTER

Over the past decade, the face of municipal government has undergone a drastic change. The early reasons for supporting workplace literacy programs, such as improved health and safety in the workplace, hiring policies that required a Grade 12 or equivalent diploma, the introduction of new technology, and the opportunity to improve labour-management relations, have given way to the issues of the new knowledge society. Restructuring, amalgamating, and designing a municipal government operation that can drive a "smart local government" are all factors that motivate them to operate more efficiently. In addition, local governments will have to attract and retain skilled workers as the "baby boomers" leave the workforce. For example, the City of Winnipeg will lose approximately 50% of its municipal labour force within five years. To meet these demands, municipal governments are setting up workplace literacy and education programs that will assist municipal workers to upgrade their skill base and keep it current in the knowledge-based worksite.

The range of skills required to cope in today's municipal workplaces has grown dramatically. In response, literacy has taken on a much broader meaning. Employees have to understand and use information in new and more complex ways. They have to understand the uses of technology and have the skills to apply it. Critical thinking and problem solving on the job are essential in their daily routines. For instance, there are new provincial requirements in place for water and wastewater management in Alberta, Ontario and Saskatchewan. Workers in these areas must now get certification which requires passing certification courses and exams. Workplace literacy programs provide the assistance workers might need to adapt to a new routine of study, training and test-taking.

## Literate Cities Project

The Canadian Association of Municipal Administrators (CAMA) Literate Cities Project works with municipal stakeholder committees composed primarily of labour and management representatives to prepare for a workplace literacy program. In some cases community partners are also on the committee, as in Moncton, New Brunswick. In the City of Moncton, the workplace committee with about 20 members has representation from all its unions, from senior management, local community college instructors, and literacy educators.

The Project also has numerous partners across Canada that help to raise awareness about the importance of having workplace literacy programs available for municipal workers and their adult family members. They represent municipal managers and unions, provincial and local literacy agencies, educational institutions, program learners and governments. These partners serve an important function. They know what resources and options are available for the new initiative, and they can provide valuable advice. In Bathurst, New Brunswick, for instance, community outreach by the

committee has drawn local businesses into the lifelong learning cycle. People in local businesses are instructing in their own areas of expertise such as landscaping and insurance. Here, personal learning is on the educational agenda as well as learning for work.

## Workplace Literacy Initiatives Across the Country

CAMA began workplace literacy initiatives in 1994 with five pilot projects in the municipalities of St. John's (NF), Bathurst (NB), Moncton (NB), Edmonton(AB) and Port Moody (BC). Since then, CAMA has actively promoted and supported workplace education across the country. With the start of the Literate Cities Project in 2001, CAMA intensified its activities and raised the visibility of workplace education. By early 2003, 60 municipal programs were in place, completed, or in the planning stages.[1]

| **Municipal Workforce Literacy Programs by Province & Territory** | NF | NS | PEI | NB | QC | ON | MB | SK | AB | BC | NT |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Currently in place, completed or planned | **2** | **4** | **1** | **5** | **1** | **16** | **3** | **3** | **7** | **16** | **2** |

## Challenges

The challenges faced by the Literate Cities Project are common to many sectors involved in workplace literacy:

- Overcoming the negative perception of the need for literacy. It is essential for managers to understand the expanded role of literacy in today's workplace.
- Integrating literacy and personal learning into municipal training and development structures. The City of Winnipeg committed three million dollars to overall training and development which included an essential skills program for workers.
- Emphasizing the importance of critical thinking and problem-solving, rather than just high school equivalency, as key to succeeding in the knowledge economy.
- Working through a strictly joint process once the decision to move forward is made.

## Three Areas of Current Activity

To facilitate municipal workplace literacy initiatives, the Literate Cities Project, under the theme of "strengthening and building our networks," has undertaken actions in three categories:

- **Direct intervention at the local, provincial and national levels.** Activities include two Literate Cities 2002 Conferences, assisting with the development of new workplace literacy programs, the development of an electronic discussion format called Literate Cities Link, in partnership with CUPE (through NALD), and the establishment of an Award of Excellence

1. At the time of publication, the numbers of municipal programs in varying stages of planning and implementation has grown to 75-80 worksites across Canada.

for Municipal Workplace Literacy Achievements.

- **Development of tools to support the implementation of workplace literacy programs.** Two new resources have recently been added: *After the Pilot Projects: Re-visiting the Process*, a case study of the five pilot projects, and *A Guide for Planning and Conducting an Organizational Needs Assessment for Municipal Workplace Literacy Programs*. The guide outlines a process for doing an ONA, and has options for the planning committee to consider.
- **A road map to the future.** We have been doing research and consulting partners about what a literate municipal workplace and community might look like. In 2003, a national committee was set up to take a critical look at the position paper, *The Learning Community: Creating a Blueprint* by Michelle O'Brian.

See the CAMA website for the work and the resources of the Literate Cities Project: **www.camacam.ca**

**Patricia Nutter** is Project Director of the Literate Cities Project.

# Canadian Union of Public Employees (CUPE) is Making Literacy a Union Issue


DEBRA HURON AND SYLVIA SIOUFI

Since it was established in July 2000, the CUPE National Literacy Project has been bringing people together within Canada's largest union to make the kinds of changes that can transform workers' lives.

"We find that as CUPE moves forward on literacy issues, we are empowering our members to stand up for equal pay, to fight privatization, and to speak up on a whole range of human rights and economic issues that matter to workers," said Judy Darcy, CUPE's National President.

Having a national office to coordinate the literacy efforts of such a large and diverse union is very important. The literacy project receives funding support from the federal government's National Literacy Secretariat (NLS).

"I have found that people are open to the seeds that our project is trying to plant," says Sylvia Sioufi, the project's coordinator. "We talk about literacy as an access and equity issue. Workplace literacy programs are key to providing support for members who face technological change, contracting out and demands for certification. So we tell our locals that it's time to claim our education."

## Literacy Activists Engage Union Members

Raising awareness means talking to people, and Sylvia has done a lot of talking, and travelling, in the last two years. She has national support from a 12-member reference group composed of CUPE literacy activists. Together, they have been getting the message out to CUPE members, by

- speaking to thousands of CUPE members at provincial CUPE conventions and conferences,
- organizing and delivering workshops on union-based literacy and clear language, and
- helping to start new workplace literacy projects all across the country.

Some of the successful workplace literacy projects include CUPE Local 500's in Winnipeg (see "The City of Winnipeg and CUPE Local 500 Success Story"). In Saskatchewan, where 100 CUPE members from waterworks facilities must pass certification exams, the provincial government has agreed to help the union find out if there's a need for essential skills training. "We suspect that some of our members will find certification exams to be a great challenge, because they will have forgotten or will not have had the opportunity to acquire some of these essential skills," said Naomi Frankel, CUPE Saskatchewan's Waterworkers Project coordinator. Naomi will visit worksites across the province to find out what upgrading workers need and how best to provide it.

## CUPE at the Literate Cities Conferences

In September and November last year, CUPE's Literacy Project helped to plan two Literate Cities 2002 conferences with the Canadian Association of Municipal

Administrators (CAMA).

For some CUPE locals, the benefits of sending members to the conferences were immediate, such as:

- Local 474 at the Edmonton Public School Board, where a team of two union and two management representatives came home from September's conference with the will to implement a workplace literacy project for 600 custodians. By early November, they had signed a new collective agreement that includes plans for a workplace literacy project, something that management had fought before attending the conference.
- Local 21 at the City of Regina, where David Storey is working with his colleagues, who are also outside workers, to launch a new literacy program that is likely to include firefighters, transit workers and inside workers. After coming home from the *Literate Cities 2002* conference, both union and management met in November to develop the Terms of Reference for a literacy project within the City.

## More Efforts and Momentum for Change

Last winter and spring, three of CUPE's provincial divisions hosted courses on workplace literacy issues. The focus was on clear language communication (in Saskatchewan) and on union-based literacy (in Manitoba and Ontario). In North Bay, Ontario, and Harrison, B.C., CUPE members signed up to attend similar workshops organized by the Canadian Labour Congress.

Across the country, CUPE staff in the union's Education Department are some of the project's biggest allies. Here are two examples of their efforts:

- Josey Finley, Alberta education rep, helped the Alberta Federation of Labour (AFL) produce a new video about workplace education, putting the director in touch with CUPE members in two municipalities and one school board. The video is now available for $10 from the AFL. Phone (780) 483-3021 or e-mail afl@telusplanet.net
- In Nova Scotia, education representative Gloria Murphy-Campbell has been working closely with the provincial Federation of Labour and other unions to develop a peer learning guide program. The program will train union mentors to help co-workers participating in workplace education programs. The first training sessions are planned for this summer.

"There's a lot going on, and a lot of momentum for change," says Sylvia. A new phase of funding from NLS will begin this summer, as CUPE continues to build on the Literacy Project's slogan: *Literacy is a union issue!*

For more information on the project or to subscribe to CUPE Literacy News, the project's newsletter, contact Sylvia Sioufi at (613) 237-1590 or by e-mail at literacy@cupe.ca

**Debra Huron** is an Ottawa writer and editor who specializes in clear language. She writes *Literacy News,* the newsletter for the CUPE National Literacy Project.

**Sylvia Sioufi** is the coordinator of CUPE National Literacy Project.

# Timing Right for Workplace Literacy Initiative in Ontario

CINDY DAVIDSON

In Ontario, the word "literacy" received new life in 2002, and what made this most exciting is that it occurred outside of the traditional circle of education. With the "knowledge economy" spreading to all sectors, employers were using the word more than ever, from smaller hotel and tourism chains to big players in the labour market, including the Canadian Manufacturers and Exporters. For the Ontario Ministry of Training, Colleges and Universities (MTCU) the timing couldn't have been better.

While the Ontario government has been involved in workplace education over the years, 2002 saw a renewal of support and the launch of MTCU's new workplace literacy strategy. The strategy, first announced in 2000, was designed to encourage the development and delivery of literacy training in the workplace by promoting literacy and the Literacy and Basic Skills (LBS) program to employers and employees and encouraging their investment.[1] Regional literacy networks will play a lead role in the implementation of the strategy with their links to delivery agencies and the broader community and their experience in community planning and public education. The expectation is that a fee-for-service delivery system would be developed in each region and promoted to employers.

## First Sites for Workplace Development

In early 2002, five networks (out of an existing sixteen) were selected to be "first sites" to pilot the initiative for one year. The selected networks, representing a cross-section of the diverse literacy field in Ontario, included: The Mid North Adult Learning Network (based in Sudbury and serving the lower north-eastern part of the province), QUILL Learning Network (based in Walkerton and serving Mid-Western Ontario), Project READ Literacy Network of Wellington-Waterloo (based in Kitchener and serving the Kitchener-Waterloo-Cambridge-Guelph region), Literacy Link Niagara (based in St. Catharines and serving the Niagara Region), and Literacy Ontario Central South (based in Peterborough and serving the Kawartha-Haliburton-Muskoka area).

With special project funding provided by MTCU and the National Literacy Secretariat (NLS), the networks spent the early months of 2002 developing work plans, marketing strategies and evaluation tools. It was crucial that there be flexibility in the delivery models and in the ability to customize the content of the training programs, but the emphasis was to be on the delivery of essential skills training for employees, offered on site and for a fee. To meet these goals, the first sites needed development work, especially in the

1. Ministry of Training, College and Universities letter to the LBS field, September 1, 2000, Sandie Birkhead-Kirk, Senior Manager, Literacy and Basic Skills.

areas of protocols, policies and best practice principles. The Ontario Literacy Coalition was funded to provide coordination, training and support to the first site organizations as they delved into this new area. One of the major outcomes of the first-site implementation phase was a marketing package for employers that outlined the benefits and value of offering essential skills training to employees.

As the first sites come to an end of the pilot year, it has become evident that while much has been learned and accomplished the networks are still on an upward slope of their learning curve. The network Executive Directors have collaborated on a summary report of their experiences during the first year. Among many recommendations to the Ontario literacy field, one of the strongest is that networks be given the proper amount of developmental time in order to ensure that delivery agencies are in sync with the training needs of employers, employees and adult learners with employment goals.

## Challenges and Opportunities

While agencies have gradually been moving toward a workforce training culture since the reform of the LBS program in the mid-1990s, customized workplace programs based on a fee-for-service structure is still a new facet to programming that offers many opportunities, but also challenges. The development of a coordination model, the building of internal and external partnerships, and the roll-out of marketing strategies played out differently in each first site network region, but there were consistencies that cannot be ignored. It is very clear that for a workplace literacy initiative to succeed, it has to include the following:

- Collaborative partnerships and trust among delivery agencies.
- Strong links to employment-based stakeholders in the community offering similar training.
- Marketing materials that respect the diverse employment sectors, their employers and employees.
- Buy-in from employers and employees.
- A training program that speaks to the employment environment and the bottom line.

These requirements are no small feat for networks and agencies, but not insurmountable. We hope that the lessons learned and articulated in the first site summary report will provide the springboard for continuing support and exciting opportunities.

**Cindy Davidson** is Executive Director, QUILL Learning Network in Walkerton, Ontario.

# Workplace Basic Skills in the UK

FIONA FRANK

As I move on from the Workplace Basic Skills Network, to carry out research into the not unrelated issues of education and immigration,[1] I've spent some time looking back at the last twelve years of working in this area.

It's obvious to anyone who's been around in workplace basic skills in the UK over the past twelve — or ten — or even three years that there have been a lot of changes in this field. When I started doing research into the topic in 1991, the landscape was rather deserted — with excellent work being done by Workbase around the country, and with a basis to work on left by the Industrial Language Training Units, but with very little else going on apart from a few pockets of activity run by some training providers around the country. One was Jane Mace at Goldsmiths College, who was delivering training to the University cleaners and wrote about this in the seminal book *Time Off to Learn* (Mace & Yarnit, 1987). In 1992, in what we then thought was an influx of untold wealth, twenty pilot projects were funded by the government as part of a £6 million "Basic Skills at Work" initiative.

## New Projects, New Visibility, More Commitment

Now, of course, we have massive Government commitment, an adoption of this issue by every Local Learning and Skills Council (LLSC) in England — and new projects and new commitment in Wales, Scotland and Northern Ireland — and new visibility of this previously obscure topic in the media everywhere you turn. Excellent press, focused particularly on the Union Learning Fund model workplace basic skills programs, has raised awareness, in probably every sector, of the usefulness of this type of training both to the organisation and the individual. The Employer Toolkit has been sent out by the government Adult Basic Skills Strategy Unit to thousands of employers over the country, providing a useful "peg" for them to hang any number of new projects on. New targets for basic skills achievement are being adopted by Local Learning and Skills Councils in every region of England; and several sources are saying that in many regions 50 per cent of these targets will be reached by learners in the workplace.

All the generic agencies who have an association with this work have taken on new staff and new commitment to engage with the workplace basic skills agenda. The National Institute of Adult Continuing Education (NIACE), representing the adult learner, has an enormous engagement with the National Health Service University. The Learning and Skills Development Agency (LSDA), supporting all training providers, commissioned John Payne to carry out a

1. I will be starting a full-time PhD later this year at Manchester University Centre for Jewish Studies, looking into the educational experiences (secular and religious) of second generation Jewish immigrants to Glasgow in the early part of the last century — with a view to making connections with the situation of asylum-seekers today. I would be very pleased to discuss this further with anyone who is interested in this topic (particularly those with even one Jewish grandparent). Please contact me on my home e-mail address fionafrank@soundboard.f9.co.uk.

large project charting research in workplace basic skills (Payne & Grief, 2002). The Basic Skills Agency (which has of course been involved in workplace basic skills for many years) has been running the Broker scheme and the National Training Organisation mapping project and is delivering several new regional and national projects.

The Trade Union Congress, with the Union Learning Fund, has played probably the largest part of all the agencies in bringing basic skills to new learners. The Employers National Training Organisation (EMPNTO) has developed new standards for personnel managers in development of their staff's basic skills. The Learning and Skills Council has set up the Basic Skills Quality Initiative, looking at how work-based learning providers can benefit from this initiative. The government-funded Employer Training Pilots, which test financial incentives to employers linked to paid time off for individuals without basic skills or basic qualifications, have just been given a £130 million boost to extend them to new regions of England.

The UfI — which has now taken on as its name just the initials of its original title the "University for Industry" because, contrary to its founders' vision, it will never be a University and doesn't just work for industry — is providing a new means of delivery of learning and new learning sites through its IT-based delivery arm *learndirect*.

The UK Government Adult Basic Skills Strategy Unit's commitment to raising the qualifications levels — and the career structure — of the basic skills teaching workforce is commendable. And The Workplace Basic Skills Network has been funded by the Department for Education and Skills (DfES) for the last three and a half years to support practitioners to improve their delivery, through continuing professional development and the dissemination and sharing of good practice.

## Still a Serious Gap in Development Funding

But from where I have been sitting: within the Workplace Basic Skills Network, a network representing the interests of workplace basic skills providers — there still seems to be a serious gap, between all this commitment, rhetoric and agency activity, and the actual payment of development funding in order to allow experienced and qualified practitioners to work with companies to get programs set up. Questions on funding form the most "frequently asked questions" to our staff and at our events. We know that there's commitment from the Learning and Skills Council to get it right — but we hope it doesn't take too long.

See the Workplace Basic Skills Network Website (**http://www.lancaster.ac.uk/wbsnet**) for a summary of the findings of the independent evaluation of the Building Basic Skills in the Workplace (BBSIW) Initiative. This Initiative was probably one of the Network's most successful achievements. In the summer of 2000, we persuaded the DfES to fund 32 workplace basic skills projects through this Initiative, which we managed. We received more than 140 applications for this funding. We worked with the LSDA and NIACE as well as the UK Government Department for Education and Skills (then the Department for Education and Employment) in judging the bids and deciding which projects should be funded.

The evaluation summary shows that the approach allowed both the piloting of new approaches by organisations which already had experience in delivery, and the involvement in this field by new organisations which had not already delivered programs. We know from our contacts in the field that in many cases this funding was the beginning of long-term, successful partnerships between delivery organisations, employers, unions and

other agencies.

We are told that Local Learning and Skills Councils funding in this area of work is under-spent. Although only 32 projects could be funded as part of the Initiative, at least 80 of the 140 applications we received were excellent projects, well worth funding, with realistic targets, well-written plans for writing student learning plans, and a commitment to continuing professional development of staff thereby ensuring sustainability. We know that some of these projects were funded by other sources, but many have just remained in the imaginations of the bid-writers, who spent some time over the summer of 2000 slaving over a hot tender rather than enjoying the sunshine.

We think the Initiative shows that it's time for new local funding mechanisms to be developed, allowing easy access to targeted provider-led project funding which will pay for the time for training needs analyses to be carried out; for new materials to be developed; for basic skills practitioners to take part in partnership work and attend steering groups; and for delivery to take place in small groups. This would be complementary to the Brokerage marketing initiative and the Union Learning Fund union-driven projects, providing an additional focus for the development of new projects and the achievement of the targets. Why was the BBSIW initiative massively oversubscribed, whereas some current LLSC funding rounds are under-spent? Because the tender was written in a way which was accessible and appropriate for workplace language, literacy and numeracy providers, and publicity about it was targeted to those organisations which had already expressed an interest in working in this area. It should not be hard for Learning and Skills Councils to emulate this example, and to provide assistance on bid-writing to aid practitioners to turn good ideas into concrete proposals. This has been done most effectively by SEEDA, the South East of England Development Agency.

The new government-funded UK National Research and Development Centre on Adult Literacy and Numeracy (NRDC) is developing the concept of "practitioner-researchers," providing training for basic skills practitioners to carry out research linked to their ongoing practice. It would be a short step to include a commitment for funded projects to include an element of research as well as development. York College and the London Language and Literacy Unit, for example, both successfully incorporated research into their BBSIW funded development projects.

The Workplace Basic Skills Network, set up in late 1993, has been listening to its members for the last ten years, which has led me to be so sure that there is a serious funding gap. This gap needs to be addressed to achieve the government target which is for 1.5 million people to have improved their literacy and numeracy levels by 2007.

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# Work-Related Basic Education in the United States: A Mixed Bag

PAUL JURMO

In *Good Practice in Use: Guidelines for Good Practice in Workplace Education*, Mary Ellen Belfiore summarizes guidelines for effective workplace education programs. These guidelines draw on work done by practitioners and researchers in Canada and several other countries.

A similar study done in the United States for the U.S. Department of Education in 1998 likewise identified guidelines for work-related basic education (Jurmo, 1998.) This report broadened its scope to look at work-related learning in both workplace settings (for incumbent workers) and in community adult education programs (for either employed or unemployed learners). This latter study drew on evidence from both workplace education programs (including the excellent work done in Canada in the 1990s) and job-training and adult basic skills programs which attempted to provide education and other services to help adults get and succeed in jobs.

In the five years since that report, the field of work-related basic education in the United States has been a mixed bag. On one hand, there has some promising work by creative practitioners and researchers which could be used as building blocks by the field as a whole. On the other hand, policy makers and funders (at the national, state, and local levels, and within all sectors — government, employers, and unions) have largely shown a lack of awareness, support, and leadership for this work. Compounding this lack of support from policy makers and funders is the fact that those who create and benefit from effective work-related basic education programs are generally not organized as an effective constituency to educate and pressure policy makers for the support they need.

In this paper, I would like to describe a few examples of promising developments in the field.

## New Standards For Work-Related Basic Skills

Equipped for the Future (EFF) is a systems reform initiative of the National Institute for Literacy. Begun in the mid-1990s, this effort drew on input from many stakeholder groups — including employers, unions, and adult learners — to clarify what "adult basic skills" should now mean in U.S. society. The result: "basic skills" now was to be expanded beyond the traditional "3Rs" of reading, writing, and math to include problem-solving, teamwork, research, technology, lifelong learning, and other skills.[1] The EFF skills are also very consistent with the work of adult educators who for years called for a broader and more thoughtful definition of basic skills for adults.

EFF sees these skills as key for any

1. Those who read the reports — including the SCANS report, *Workforce 2000*, *America's Choice: High Skills or Low Wages*, and the American Society for Training and Development's *Workplace Basics* — from the 1980s and 1990s, which summarized the skills that employers wanted in the workforce, will find EFF's list of basic skills very familiar.

adult who wishes to participate effectively as a worker, family member, or community member/citizen. In addition to naming the skills, EFF researchers have more precisely defined each one, breaking them into components to make it clearer to practitioners and learners what sub-skills are needed to, for example, "read with understanding." By so doing, EFF makes it easier for practitioners to know what to teach, for learners to know what they need to learn, and for those who evaluate programs to know what learners are achieving.

Unlike previous efforts to define "what adults need to know," EFF didn't stop with a tidy list. EFF has — again, drawing on research — also mapped out principles of adult basic education to guide practitioners in their curriculum design. EFF holds that instruction needs to be "purposeful" to learners (focused on goals meaningful to them), "transparent" (i.e. designed so that learners understand why they are learning particular things), "contextualized" (built around real-world applications of skills), and "constructivist" (helping learners to build on what they already know). Instruction should also have ongoing assessment built into learning activities, to help learners and practitioners to reflect on what is being achieved and how to keep activities on track, while also providing evidence to incorporate into program evaluations.

## Built-in Training and Assessment Systems

EFF staff have also taken on the mammoth task of developing a training system to help interested adult educators learn how to adapt EFF to their particular situations and, in turn, train others to do so, as well. EFF staff are also working with state and federal policy makers to help them understand what they need to do to provide professional development and reporting systems which support the EFF framework.

EFF staff are also now (a) developing an assessment system tied in with the National Reporting System for adult education programs, (b) creating a work-readiness credential which learners can earn if they demonstrate proficiency via the new assessment system, and (c) piloting EFF in specific industries, to provide tools for those wishing to incorporate EFF into work-related education programs.

This ambitious systems-reform initiative is making real changes in U.S. adult education programs. For those who focus on helping learners develop the basic skills they need for work, EFF provides many useful tools and a nation-wide network of like-minded professionals (linked via e-mail and periodic institutes). This is especially true for those who support the systematic approach to workplace education outlined in Mary Ellen Belfiore's report. (See **www.nifl.gov/nifl/eff.html** for more information.)

## An Organizational Needs Assessment Success Story for Union Workers

In early 2001, a team of workplace educators adapted the workplace needs assessment methodology pioneered in Canada (Folinsbee and Jurmo, 1994) to document the educational needs of subway and bus workers in New York City. The newly-elected leadership of Transport Workers Union (TWU) Local 100 was interested in setting up education and training programs to help its members deal with the new technologies being introduced into virtually every job held by the local's 36,000 members. TWU brought in two staff from the Consortium for Worker Education (CWE), a city-wide network of union- and community-based basic skills, job training, and job-placement programs to help

TWU develop an education strategy.

The CWE staff worked with a committee of TWU members to clarify what questions they needed to answer and where to find needed information. (The CWE representatives had received training in the Equipped for the Future standards and wove EFF's list of necessary skills into their investigations of skills needed by TWU members.) The research team set up focus groups with groups of workers from key departments, including track maintenance, signals, cleaning, car and bus maintenance, and station management. The team found that (a) virtually all workers were concerned about the changes being created in their jobs by technology and other factors, (b) workers wondered what impacts these changes would have on their job security and chances for advancement and further education, and (c) many workers had considerable skills — including familiarity with computers — that they wanted to further develop through various kinds of education and training.

This input from workers — and additional input gained through meetings with Transportation Authority representatives — provided the research team with rich information and ideas. The two CWE representatives — with many years between them as adult educators and researchers — wrote a report which described the context in which workers were now operating, the need for various kinds of education and training programs, and options that the TWU could pursue.

## Now — A Member Education Program in Place

It is now two years later. TWU leaders took the report seriously. Working with the Consortium for Worker Education, the TWU has gotten resources and hired new staff to put a member education program in place. The TWU is now operating classes which help 750 members per year develop computer, ESOL, electronics, math, and other skills they asked for. In recent contract negotiations, the union and Transit Authority management also agreed to set up a joint US$ 9.1 million education fund over the next three years. It is now planning to set up new computerized learning facilities and counselling services, and is developing career maps to identify job titles and skills sets for 35,000 workers. All of this started with a forward-thinking union leadership and a thoughtful, New York version of an organizational needs assessment. (For more information, call Arthur Goldberg at 212-873-6000, extension 2152 or Maureen LaMar, extension 2016.)

## Helping Unemployed Garment Workers Get Ready for a New Future

The September 11th attacks affected many workers in New York City, including garment workers in the Chinatown neighbourhood near the lower-Manhattan site of the attack. Many garment shops closed permanently in the months after the attack, as entire neighbourhoods were closed to deal with construction, security, or environmental needs. For Chinese-speaking garment workers who spoke little English and had little experience outside the garment industry, that has meant unemployment and financial and psychological insecurity in the past year.

In fall 2002, the Consortium for Worker Education received a grant from the September 11th Fund to help these workers develop skills in basic English, computers, and job-readiness, to help them move into new jobs inside or (more likely) outside the garment industry. CWE staff quickly set to work to assess the learners referred

from a Chinese community development organization, develop curricula, hire and train teachers, and schedule classes. This program — called "STEP" (Skills Training for Employment Program) — attempted to put into place several features often included in guidelines for work-related basic skills programs, including:

**Integration of basic English skills with computer and job-preparation skills through:**

- **Cross-training** English as a Second Language (ESL) teachers, computer teachers, the career advisors who provided job-preparation workshops, and the interpreters who helped out in classes where learners spoke very little English. In addition to regular meetings, teachers communicated via an electronic bulletin board.
- **Contextualized curricula** for English for Speakers of Other Languages (ESOL) classes, computer classes, and job-prep workshops which focused on helping learners get the skills needed to get and succeed in the jobs they were most interested in.
- **Ongoing communication with learners** to clarify what jobs they were most interested in, what learning activities they felt were most useful, and concerns they wanted help with.
- **A mix of learning activities** aimed at helping learners learn in various ways, using different learning modalities: For example, learners went on local field trips, organized holiday parties, created publications illustrated with clip art and photos (hard copy and web-posting), and used a computer lab regularly for keyboarding, surfing and ESOL practice.
- **Portfolios** in which learners stored sample work, to enable teachers, learners, staff, and funders to track learner progress.
- **Focus on both job-related and other skills:** The curriculum recognized that the learners played multiple life roles (worker, family member, and community member) and had both immediate needs (e.g., get a job) and longer-term ones. The curriculum therefore focused on (a) communication skills needed to handle tasks faced in a wide range of jobs, (b) skills learners could also use in other situations not directly related to work, and (c) helping learners connect to additional adult learning opportunities beyond this program.

**Intensity of learning activities:**

Funding allowed learners to participate in a minimum of 25 hours per week over a 13-week period. This is in contrast to the more common three to six hours of classroom time typically found in adult ESOL classes. In fact, learners could receive a $300 per week allowance if they successfully participate in 25 hours of classroom activity, making it easier for the unemployed and financially-at-need learners to participate.

**Support for teachers:**

In addition to providing curriculum resources and training to teachers, the program pays what — for adult educators — is a substantial wage, under a contract negotiated with the teachers' union.

For more information, contact Debbie Buxton at 212-647-1900.

These three examples provide ideas and inspiration for those who believe in work-related adult basic education. But in this uncertain time, we need to become more effective as advocates for our work. We need to educate policy makers and funders — who are distracted by many other pressing priorities — about the value of this work and the supports we need to do it.

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# Building Essential Skills Through Training (BEST):
## Massachusetts Responds to the New Skills Challenge

CATHRYN LEA, MISHY LESSER, AND JOHAN UVIN

### New Skills Challenge Requires New Ways of Thinking About Worker Education and Training

At different points in time and with varying degrees of success, Massachusetts has developed an assortment of policy initiatives, demonstration projects, and capacity building endeavours to support worker education and training. These initiatives have been designed to meet the demands of employers for skilled workers and employees for skill development.

From the mid-1980s to mid-1990s, Massachusetts created and operated an effective interagency workplace education system (i.e., The Massachusetts Workplace Education Initiative), which allowed for scores of practitioners and policy makers to come together for the purpose of building quality programming across the state. During this timeframe, a workforce development system that had historically focused its attention on the unemployed began to broaden its gaze to include the under-employed and the incumbent or employed workforce in need of new skills and career development.

In 1998, The Massachusetts legislature created the Massachusetts Workforce Training Fund, allocating $18 million annually to incumbent worker training. At the same time, several federal incumbent worker demonstration and system building grants, as well as skill shortage grants reached the state. Soon thereafter, a broad-based coalition of stakeholders from the long-term care industry came together, resulting in the Massachusetts Nursing Home Quality Initiative. One of the legislative achievements of this initiative was the enactment of the Extended Care Career Ladder Initiative (ECCLI) in 2000.

This influx of federal and state resources into the workforce development system was thanks to the effective partnership-building, strategic planning, and grant-writing skills of many education/training providers, union leaders, academics, workforce professionals, and employer associations. Although there is great variety in the precise configuration of each of the workforce partnerships, there are some common features that seem to help define their success. For example, employer involvement was deemed crucial, because all stakeholders agreed that their shared purpose went far beyond labour exchange or job placement. The ultimate goal was to link learning to work and use this as a tool to help people access prosperous, fulfilling careers. Without employer participation, no learning or career development infrastructure could be built. There were conversations about the regional nature of labour markets and therefore the need to involve regional stakeholders in the planning process for these interventions. In addition, the integration of adult basic education/ESOL and occupational training, and the importance of making wrap-around and support services available at the

pre- and post-employment phase, became the preferred design features used by the practitioner community. As one group of researchers put it:

> *New economic realities have created a need for workforce and education policies that better meet employer demands for skilled workers and the needs of workers for economic self-sufficiency. To address these demands, there is growing evidence that workforce and education systems should be reorganized around "career pathways" that integrate education, training and work and are targeted to high wage, high demand employment. Central to the "career pathways" model is the development of clear connections, or bridges, between basic skills development and entry-level work or training in high wage, high demand career sectors.*[1]

## Massachusetts Looks Outward for New Models

The workforce community then began scanning the country for viable models and found that several national practitioners and think tanks were reporting success with sector projects and career ladder development efforts. Practitioners began to compare their own accomplishments with these promising practices and reaffirmed that the most successful programs appeared regional, had an industry focus, were supported by unions and industry associations, and reflected a deep understanding of labour markets and the people who make them run.

Simultaneously, local funders began to express a willingness or interest to further invest in these kinds of models. The practitioner community became flooded with new workshops, coalitions, and committees dedicated to researching and disseminating career ladder approaches and sector project models. It is on the foundation of this vastly complex array of efforts by hundreds of individuals that the following initiative rests.

## Enter the BEST Initiative

In April of 2001, Jane Swift, the former governor of Massachusetts, established a task force to reform adult education and worker training as her first initiative upon becoming governor.[2] One of the specific recommendations of the task force involved the creation of a new program — the Building Essential Skills Through Training (BEST) Initiative. BEST was conceived to help meet the demand for more highly skilled workers through a model of integrated workforce development services. It was set up as a grant program that would award two-year start-up and support funds to regional workforce partnerships. Required partners included employers, education/training

1. Alssid, J., Mazzeo, C., & Rab, S. *Building Bridges to College and Careers: Contextualized Basic Skills Programs at Community College.* Workforce Strategy Center, New York-San Francisco, 2003.

2. Her mandate came on the heels of a report that startled local public opinion by stating that one in three Massachusetts workers are not adequately prepared for the New Economy. Comings, J., Sum, A., Uvin, J., et al. *New Skills for a New Economy: Adult Education's Role in Expanding Economic Growth and Expanding Opportunity.* Massachusetts Institute for a New Commonwealth, Boston, 2000.

providers, local workforce boards, and employees or organized labour. The program was designed to meet three overarching goals:

1. Help address the front-line workforce development needs of Massachusetts employers, industries, and sectors, particularly those experiencing or anticipating skill shortages.
2. Improve basic foundational or occupational skills of Massachusetts workers to support employment and career mobility.
3. Provide opportunities and resources to Regional Industry Teams to develop and implement innovative workforce development models that drive system change.

Competitive advantage was given to proposals that:

- Were industry driven
- Developed integrated workforce partnerships
- Emphasized basic and foundational skills in the context of work
- Promoted long term employment and career mobility
- Included internships, job placement, and post-employment support
- Expanded access to education and training
- Strengthened the skills of workplace educators
- Were data-driven based on current labour market information
- Focused on outcomes
- Provided evidence of a strategy for developing sustained improvement or change
- Promoted co-investment by the partners.

Six projects were funded in 2002 in health care, finance, manufacturing and biotechnology. All the funded projects bring together companies, local workforce investment boards, education/training providers, workers and/or organized labour, and one stop career centres for the purpose of designing and delivering education, training, and support services to support worker skill and career development.

## Two Examples of BEST Workforce Partnerships: Biotechnology and Hospitals

### Biotechnology

In the case of the Blueprint for Biotechnology project, the partnership is led by the Massachusetts Biotechnology Council, the state's leading employer association for the industry. The BEST Initiative has allowed the industry association to reach out to community colleges, workforce investment boards, and career centres in order to develop a coordinated effort to create a standard state-wide bio-manufacturing curriculum. Participants are receiving training on company time to gain access to quality entry-level jobs at the participating employers. Then they progress up existing career paths to more skilled positions that pay higher wages. Certificate programs in bio-manufacturing are operating at two participating community colleges.

To complement the BEST Initiative project, Commonwealth Corporation approached a group of Boston community-based organizations and organized them to apply for private funding to develop a job

readiness curriculum for bio-manufacturing. Led by the Urban League of Massachusetts, the coalition members are working together to recruit and prepare individuals from their diverse constituencies for vocational training and employment in the biotechnology industry.

### Hospital Industry Consortium

In the case of the Metro South/West Hospital Industry Consortium, the local regional employment board joined with four hospitals in a sectoral project to address staffing shortages in the industry. The project's goals are to:

- reduce shortages of technical and nursing personnel
- improve the earnings of housekeepers, and food and environmental services workers, through education and training
- improve access of public assistance recipients and low income residents to jobs in the health care sector.

Backed by an unusually strong coalition of hospital administrators, the partnership is dedicated to addressing the shortage of nurses, moving workers into higher paying nursing and management positions, and expanding to other hospitals in the region.

Recent comments by Sylvia Beville, Executive Director of the Metro South/West Regional Employment Board that leads the hospital consortia, reflect early lessons learned from the project:

> *In our sector organizing efforts, the most important thing is to listen to the employers and other partners and then to be flexible. I constantly remind myself to stay focused on the outcomes, and to recognize that there must be a hundred ways to get there. The real goal is to get workers better jobs and to resolve any of the workforce dilemmas that the hospitals have, but to get there, we have to make many adjustments. For example, in one of the hospitals where they have double duty managers, we actually had to make two changes: one was to reduce the frequency of meetings and the other was to find other means of communication and consensus-building. The HR director has been fabulous because she's played that bridge role and kept people together, which allows the partnership to thrive.*
>
> *Another key learning is don't underestimate the power of employees' needs. What kept one of the hospitals at the table was participating in a focus group of workers who were talking about their excitement at being given the opportunity to learn and focus on their skill training. The education director of the hospital went to the CEO with tears in her eyes and said, "No matter how busy we are, we have to participate in this program."*
>
> *Third, although we haven't figured out the answer to this yet, here's the question: how do you deliver workplace education in a relatively small organization when drawing workers from three departments simultaneously could jeopardize operations? To address this, we are experimenting with a small classroom tutoring model that doesn't pull everyone out of housekeeping*

*and food services all at once. Participants attend class together once a week and then they receive tutoring for the rest of the week. I know that some educators would scream about this but what we have to ask is, are people learning this way, and if so that's what we have to do.*

*Finally, this is a broader comment, not just informed by our sector project work: you have to realize that relationships go through different stages and you will have dissension and the key is how you deal with the dissension. We're not into a harmony model here.*

*I'd like to close by saying that the success of our efforts owes itself at least in part to our persistence. When I begin building a relationship with the CEO at a company or hospital, I didn't take no for an answer. And in the case of our heath care industry, staffing shortage at our hospitals is so severe so that if you offer something that would appear to address this pressing issue, the employers want to come on board.*

## Strengths and Limitations of BEST

The BEST Initiative grantees are part of a growing movement toward sector projects as a response to the challenges of workforce development in Massachusetts. BEST has enabled workforce development stakeholders to continue creating career ladders in sectors where collaborations were in early stages of development. In its ten months of operation, over 900 incumbent workers received education and training services, tailored to the needs identified by 43 active and engaged industry partners. Thus far, all the BEST projects are successfully addressing the problem of supervisor reluctance to employee training and skill development. It is broadly recognized that without supervisor support, employees may face barriers when trying to apply their newly acquired skills and competencies. Since its inception, the funding partners[3] have supported the BEST Initiative by providing technical assistance to the projects and through a flexible, enlightened support of the programmatic challenges that have arisen through this innovative initiative.

The Initiative's third party evaluator, Dr. Erin Flynn, Vice President of FutureWorks, has shared some of her early observations.

*With the inclusion of community-based organizations and one-stop career centres in the workforce partnerships, these groups have performed a key function by managing the screening and recruitment of qualified candidates for BEST training. Employers at several sites have noted that this is a cost-effective, efficient and valuable service of which they were previously unaware.*

3. Massachusetts Department of Labor and Workforce Development, Division of Employment and Training, Department of Education, Department of Transitional Assistance, with support from the Governor's Office.

*Employees seeking to advance their employment status through BEST training typically require the support of their direct supervisors. In some instances the employees' desire to advance may conflict with supervisors' desire to retain good employees. This tension is inherent in the design of BEST and all demand-driven programs and beckons further reflection by the larger community of workforce practitioners.*

*Further, if a program is to be genuinely demand-driven, it needs to be responsive to changing employer needs and economic cycles. This requires flexibility on the part of sponsoring state agencies both at the programmatic level and in the way funds flow (e.g., what they can be used for; their shelf life).*

*Employer participation in education and training programs is easier to secure in tight labour markets; the economic downturn has resulted in some employers redefining the timeline of their original commitment to BEST.*

Dr. Flynn's comments raise important questions about the strengths and limitations of career ladder programs during a protracted economic downturn. Perhaps the operative image is less one of career ladders moving people upward in a linear fashion, and more one of a complex network of career lattices that increase an individual's employment alternatives and chances for job success.

While more time is needed for the workforce partnerships to complete their work products and for the finalization of the BEST evaluation,[4] it is becoming clear that BEST constitutes more than a competitive grant program. It also signals the creation of an infrastructure capable of capturing and blending multiple funding streams for a strategically defined purpose, and the building of a model for locally-based collaboration in support of sector organization. A second round of funding for BEST utilizing federal funds and focused on older youth is currently being launched. There is also dialogue in the state about how to use lessons learned from BEST, ECCLI, and other career ladder programs in support of the design of a large private-public workforce development initiative, led by private philanthropy.

## Beyond BEST: Strengths and Limitations of Other Career Ladder Programs

As mentioned earlier, BEST is not the only promising initiative in the Commonwealth of Massachusetts. One innovative example from the private sector is the Financial Services Academy and career/success pathway of the New England College of Finance. Another is the Fleet Charitable Trust career ladder initiative. On the public funding side, findings from the baseline and mid-point evaluations of the Extended Care Career Ladder Initiative provide preliminary evidence that career ladder development for workers in long-term care may have

4. A summary of the BEST Baseline Evaluation is available on our website at http://www.commcorp.org/WSS/re/EvalSummaries.htm.

considerable payoffs for both the worker and facility involved. While a discussion of these initiatives is beyond the scope of this article, the chart in Figure 1 illustrates the promise of these programs. This chart is based on the plans of one ECCLI site to create a career pathway for long-term care workers.

For further information about the BEST Initiative, please contact: clea@commcorp.org

For further information about and evaluations of ECCLI and other career ladder programs operated by Commonwealth Corporation, please visit: www.commcorp.org

For further information about new program development initiatives at Commonwealth Corporation, please contact: mlesser@commcorp.org

**Cathryn Lea,** BA, is currently the Project Director for the BEST Initiative, which is being administered by Commonwealth Corporation.

**Mishy Lesser,** Ed.D., was founding project director for the BEST Initiative and is Commonwealth Corporation's Vice President for Program and Resource Development.

**Johan Uvin,** MA, TESOL and Ed.M., is Director of Commonwealth Corporation's Research and Evaluation Department.

Skilled workforce investment professionals from Commonwealth Corporation are available on a consultant basis to assist organizations and agencies in the development of special programs, like the BEST Initiative, for incumbent workers and the under-employed.

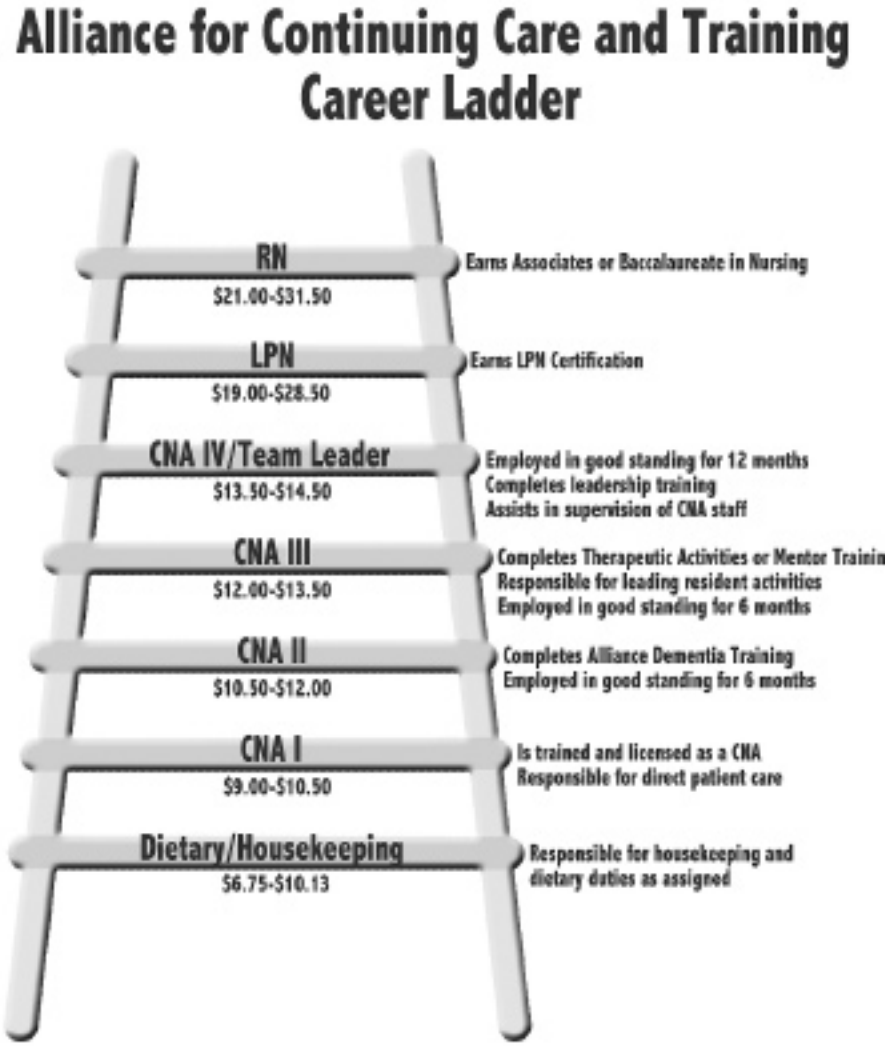


**Figure 1**

SECTION 2

# Research in Workplace Literacy

# Workplace Basic Skills — Elusive Statistics and Real Change[1]

FIONA FRANK

## Workplace Change Approach

The Workplace Basic Skills Network in the UK has paid particular attention, throughout the last ten years, to ensuring that the message coming through its professional development programs, its publications and its events, is one of a "non-deficit" and a "workplace change" approach to workplace basic skills. It is interesting that the UK Government Adult Basic Skills Strategy Unit, in their contribution to the latest Workplace Basic Skills Network bulletin talks about the fact that "basic skills" has a stigma attached to it where alternatives such as "enhancing employability" and "business skills" do not. It's illuminating to stress that they feel that the 'headline figures' such as "the cost to industry of poor basic skills could be as high as £4.8 billion a year" do not register with employers.

The Network's approach of workplace change means that we have encouraged practitioners approaching companies to relate the connections that can be made between workplace basic skills programs and those exact concepts of employability and business benefit quoted by the Strategy Unit. We feel that focusing on the negative statistics of loss, mistakes and inaccuracies which might be caused by workers with literacy problems, unnecessarily targets those workers as potentially being drains on the company's balance sheet — rather than being useful members of staff with relevant skills in other areas, who need some brush-up training to help them to contribute to the new language, literacy and numeracy demands of the changing workplace.

## Where Do the Figures Come From?

It's time, then, to draw attention to where that £4.8 billion figure actually comes from. Too many publications — and too many practitioners — are using secondary sources for this, and other, figures in their reports and publicity, with no knowledge of their origins. For example, the following statistics were quoted in *Lifelong Learning News*, Spring 2002, Issue 5 — a government publication distributed to "workers and practitioners in the field of lifelong learning." The source for all this information was given as "the Department for Education and Skills' *Skills for Life* strategy, 2001."

- Poor literacy and numeracy levels cost the UK £10 billion per year.
- The cost to industry specifically is £4.8 billion per year. A company employing fewer than 100 employees could be losing £86,000 per year. For organisations employing 1,000 employees or more, the cost could be as high as £500,000 per year.

1. A version of this article appeared in *Adults Learning*, the journal of the UK National Institute for Adult Continuing Education, in April 2003.

- ► Productivity per hour worked is 11 per cent lower in Britain than in Germany. Poor literacy and numeracy skills account for one quarter of that shortfall.
- ► 94 per cent of companies in the north-west said that reading and writing skills were important in manual tasks, yet only 61 per cent saw a need to train workers in these skills.
- ► Many employers are not aware of the dearth of basic skills in the UK's workforce. Only 4 per cent cite it as a problem.

A brief tour of the primary sources of these statistics is illuminating.

## The Cost-to-Industry Statistics

The "cost to industry" statistics and the "4 per cent" figure are taken from questions asked of employers in the Government's annual Skills Needs surveys in 1994–96, and from a 1992 Gallup survey of 400 companies published by ALBSU in 1993 as "The Cost to Industry: Basic Skills and the UK Workforce." To quote Peter Robinson (Robinson, 1997)[2] **"the £5 or £10 billion figure which is sometimes quoted for the cost of poor basic skills to British Industry is one of the least reliable figures in the whole debate."**

He outlines the problem with these statistics as follows. In the Skills Needs surveys, a large sample of employees with over 25 employees were asked if they had a skills gap; that is, if there was a gap between the skills of their current employees and the skills which they needed to meet business objectives. Only **18 per cent of respondents** said that there was such a gap; and **only 23 per cent of those respondents** — that is, **4 per cent of all medium and large employers questioned** — felt that that gap was in the area of literacy and numeracy. Nearly three times as many employers complained about the lack of management skills, general communication skills, personal skills such as motivation and computer literacy, as complained about the literacy and numeracy "gap."

It seems to me that it is worth taking these statistics at face value. If "only four per cent of employers" cited basic skills as a problem within their organisation — then perhaps only four per cent of employers had it as an actual problem. The work to be done with the others is to ensure that they understand the additional benefits to be gained by improving the basic skills of their workers even where there isn't an actual presenting problem.

Robinson goes on to talk about the Gallop (ALBSU) survey. This was a survey of 400 organisations employing over 50 people, of which again a small proportion, 15 per cent said that some of their own staff had problems with the basic skills they needed to undertake work related tasks effectively. These respondents came up with some estimates of the costs associated with these poor basic skills (for example, loss of customers due to inaccurate orders; cost of recruiting new staff; costs of duplication of work). Despite the fact that less than 15% of respondents had reported staff with basic skills "gaps," the report then grossed these figures up to £4.8 billion, to represent the costs to **100 per cent of all** 400,000 firms employing over 50 people. The figures have since been inflated to £10 billion to reflect the extra costs covered by small businesses, thus providing, as I have already said,

2. Thanks to John Payne (Payne & Grief, 2002) for bringing Peter Robinson's work to my attention.

a cause for Robinson to doubt the accuracy and veracity of these figures.

My interpretation of the data is that, in fact, **most employers find that most of their workers currently have the basic skills needed to carry out their basic tasks.** When we're marketing basic skills to employers, given these statistics, it is therefore even more important to have a greater understanding of the wider issues of the changing workplace: to be able to talk about the literacy and numeracy that workers need when they're taking part in training activities; when they're applying for promotion opportunities; when they're learning about the operation of new machinery; when they're engaging with changes at the workplace; when they're taking on new responsibilities; when they're taking part in quality meetings, talking to customers; also when they're interpreting their pay slip and their pensions data; and even when they're taking part in union activities and local community activities, and helping their children with their homework.

## Comparison Between Britain and Germany

Information about comparisons between Britain and Germany's economic performance is taken from work by Mary O'Mahony from the National Institute of Economic and Social Research (NIESR). This has recently been updated and further information is available in a paper by Mary O'Mahony and Willem de Boer (2002) available on the NIESR website. Table 1 and table 5 within this report do show an 11 per cent difference in relative labour productivity levels, and an adjustment for "low skills" of around a quarter of that figure.[3]

It is important, however, to note the definitions of "skills levels" used within this research. Germany is quoted as having 20 per cent of employees with "low skills" whereas the UK's figure for "low skilled workers" is given as 57 per cent. The government has, of course, never suggested that over half of the UK workforce has "poor basic skills." Looking closer, it can be seen that the definition of "low skills" used in the report is in fact "those with high school or no qualifications;" that is, it includes all workers without degrees or vocational qualifications. It must also be stressed that, according to this definition, "low skills" will include a high proportion of workers with GCSEs, O levels and A levels.[4] The definition used for "low skilled workers" is certainly not a comparative measure of poor *basic skills* in the two countries and, I would affirm, should therefore not be used in this way. It is merely a reflection of the different importance lent to the achievement of vocational qualifications in Germany and in England. The report itself points out that "the measure [of low skill] is deficient in that many skills may be acquired by informal on the job training and remain uncertified."

## North West Telephone Survey

The North West figures come from closer to home. They are taken from a telephone survey I carried out, as part of a research project I undertook here at the Centre for the Study of Education and Training

3. Interestingly, "Lifelong Learning News," while quoting its source as being the 2001 *Skills for Life* strategy, has actually updated its information, from the difference of 20 per cent between the two countries quoted in *Skills for Life.*

4. The GCSEs, O levels and A levels are school leaving exams taken at 16 and 18 in the UK.

(CSET) at Lancaster University with Mary Hamilton between 1991 and 1993 (Frank & Hamilton, 1993).[5] To me, the importance of the statistics quoted above ("though 94 per cent of companies in the north-west said that reading and writing skills were important in manual tasks, 'only 61 per cent' [my emphasis] saw a need to train workers in these skills") is the relatively high proportion of employers who understood the issues I was talking about, once I took the time to relate them to their particular situation. Many of the employers I talked to about literacy said "No, we don't have a problem." But once I talked about workplace change they often said something like: "Oh, you mean John? Well, we wanted to put him up for promotion but we had to change the nature of his job so he could do it. Oh, yes, we could do with some training for him!"

It certainly illuminated, for me, the lack of interest and understanding by employers of the vocabulary of literacy deficits compared with their full engagement with business benefits of this kind of training. When asked, they were all able to come up with benefits that they could see workplace basic skills training would bring to their companies. These benefits ranged from greater accuracy and an improvement in the company's image, through facilitation of change and improved communication (organisational benefits), to improved promotion prospects, job enrichment, personal development and, of course, confidence building (individual benefits).

It was this research project, plus a Commonwealth Scholarship Fund visit to workplace basic skills providers in the UK by Chris Holland, in fact, which led to the setting up of the Workplace Basic Skills Network in late 1993 (See "Workplace Basic Skills in the UK" in Section I).

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**Fiona Frank** is Honorary Research Fellow, Centre for the Study of Education and Training, Department of Educational Research, Lancaster University and the former Executive Director, Workplace Basic Skills Network.

5. The project also included case studies of workplace basic skills programs in the north of England — and the report, though nearly ten years old, is still relevant and is still available from the Network. See references for ordering details.

# A New Generation of Researchers

MAURICE TAYLOR

I'm reminded of a recent international conference in adult education where the organizers made some serious attempts to bring literacy educators together with academics to talk about research. This event was scheduled as a symposium and advertised as a key pre-conference activity at a university. Having a hand in facilitating the event, which drew over sixty participants, I was struck by several clear messages voiced at this meeting. First, literacy educators believe there is a gap between the kind of research that is conducted by academics in universities and its usefulness in the field. Second, the language that is used to conduct the more scientific literacy research is alienating to many practitioners and is often not given a chance to affect everyday practice. And third, literacy educators have an interest in doing research if they are given some tools, some time, and some assistance. Although each one of these points is worthy of further elaboration, I want to focus in on the most important one — this new generation of researchers — the literacy educators.

Before attending this conference, I had been sketching out some ideas for a national project proposal in workplace literacy to be reviewed by the National Literacy Secretariat. Having listened to the voices from the field, I now found myself struggling with elements of the project design. What is the relationship between practice and practical knowledge? What would make a practitioner pick up the results of this applied research project and read it? Was my discourse or language inviting people into the work? How much training and professional development for workplace educators was actually being built into the design? Who was going to disseminate the findings?

With some advice from a reference group, many of these questions were addressed in the design, and several months later, this national project was launched. Since two researchers from that team write about their action-based research projects in this newsletter issue, I thought readers might be interested in how eight literacy educators were transformed into researchers.

## Phases of the Action Research Project

To begin with, the underlying premise of the project was crafted around the idea that action research can help change literacy practices in teaching and learning. The project itself was designed to help instructors to use action research in various types of workplace practice settings. It was also intended to train instructors on how to use the methodology and actually carry out a research project that focused on getting a better understanding of a problem or achieving a real change or improvement in a practice context. Eight instructors were selected from across the country who were currently teaching in a workplace literacy program. Using the Conference Board of Canada Awards for Excellence in Workplace Literacy Directory, these programs were

chosen from small, medium and large businesses. In the first phase of the project, the instructors were brought together in a two-day training workshop where the techniques for the methodology were taught and a supportive network established. During this professional development activity, instructors identified a pressing workplace issue, question or concern and decided where and how to intervene in this problem area.

In phase two of the project, the instructors were guided through each step of the action research methodology. I acted as a coach for the eight instructors and provided the support and assistance required over a six-month period to complete an original piece of research. In the final phase, the actual write-up of the eight projects was completed, which resulted in a handbook.

This resource, entitled "Action Research in Workplace Education: A Handbook for Literacy Instructors," is available on-line through the National Adult Literacy Data Base at **http://www.nald.ca/CLR/action/cover.htm**, as well as through the ERIC system identified at ED 462557.

## Using the Resource Handbook

As a way of encouraging and inviting literacy educators into the everyday world of practice research, I want to say a few things about how a reader could use this resource handbook. The first part describes action research as a type of practice-based research. It outlines two models which can be used in conducting an action research project and then discusses, in some detail, the major steps of identifying a problem, collecting and analyzing data and implementing an action strategy. The information that is highlighted in this section of the resource is an abridged version of the workshop content that was presented to the eight instructors during the training session.

The second part of the resource describes eight action research projects written up as case studies. This section provides a wide range of interesting projects from various workplace practice settings. These projects were conducted by the practitioner researchers and included such topics as increasing learner motivation, adapting teaching styles, enhancing learning with the internet, assessment procedures, building teams and self-directed learning. The case study write-ups serve to illustrate the actual process in conducting action research and provide good examples of critical reflection on findings that were used to solve very common workplace program problems. In the third part of the handbook, readers find the support information needed to carry out their own individual action research project, such as practical exercises for each step in the process.

## Important Learning

Thinking back to those clear messages voiced at the Adult Education conference along with my recent experience working with those outstanding literacy instructors in the research project, I have learned some important things. It seems to me that the construction of new knowledge needs to be done in concert with learners, literacy practitioners and academic researchers. Such socially constructed knowledge is more apt to be relative and fluid. If we hold so close to the current persuasion that traditional academic theory will guide practice in the field then we've lost an important direction for the future of literacy research. Because literacy practices and beliefs are continuously evolving, academic researchers are always one step behind, trying to ask the right questions. What needs to be done now is to integrate practitioner

research into the development of the more formal adult learning theories and to encourage a new generation of researchers.

**Maurice Taylor** is a Professor in adult education at the University of Ottawa, Faculty of Education where he teaches and supervises graduate students.

# Literacy Practices and Media Perceptions of Adults with Low Literacy Skills

MAURICE TAYLOR

## Year One

The purpose of this two year project which is funded by the National Literacy Secretariat, is to document the literacy practices of IALS Level 1 and Level 2 learners from five selected communities across Canada. These sites will represent different geographical locations that offer a mix of community-based, workplace and family literacy programs. Once these sites have been identified, five practitioners will be selected and trained in ethnographic techniques to collect data on the different literacy practices of adults with low literacy skills that are involved or have been involved in a literacy program. Each field researcher will collect information from two learners. This first objective focuses on documenting the types of literacy practices and, in particular, their informal learning activities that they engage in as a result of their various roles at work, at home and in the community.

The training workshop for practitioners will centre on the use of ethnographic research methods. Ethnography is a qualitative approach that identifies understandings of the participants lives' from their own perspectives. Data will be collected over an extended period using various techniques as participant observations, interviews, questionnaires, artifact collections and learner and researcher journals. The Project Director will supervise each of the five field researchers during this phase of the project. The first year of the project will focus on site identification, field researcher training, selection of the literacy learners, development of the tools and an intensive data collection period.

## Year Two

A second objective of the project in year two is to examine how these documented literacy practices compare with the media stereotypes found in the contextual stories of Canadian newspapers and weekly magazines. An on-line media service will be used to gather the media coverage on literacy for a prescribed period of time. The Access 2000 data base will be used for classification and analysis of the contextual stories.

Both of these objectives will result in two large data sets. The focus of the second year of the project will be on the compilation and analysis of these two data sets along with the development and writing of the products. Once the preliminary analysis has been conducted, a field researcher will be selected to participate in a resident fellowship. This one week intensive study in Ottawa with the Project Director will provide an opportunity for the resident fellow to learn the final stages of data analysis and write-up of the ethnographic information and the media information. Final data analysis will be influenced by the two organizing frameworks of situated learning and informal learning.

Four products are expected from the project: a curriculum guide that illustrates how to use ethnographic methods as a way of developing a literacy curriculum; a case study report of the profiles of the Level 1 and Level 2 learners; a literacy symposium within the Canadian Association for the Study of Adult Education Annual conference and a policy implications document.

**Maurice Taylor,** Project Director, Partnerships in Learning

# The Group of Nine Experience: Action Research

PIETER TOTH

The impact of Action Research, or any form of serious inquiry, never ceases to amaze and inspire. Dr. Maurice Taylor of the University of Ottawa Faculty of Education spearheaded the Action Research Project, fondly referred to by the participants as the "Group of Nine."[1] The project design had three phases — recruitment, implementation, and sharing. For most of the Group of Nine participants, this was their first experience working with colleagues from diverse environments, right across the country, using the same research model for a wide range of topics. While all three of the phases were successfully completed, the momentum did not stop there. Nine individual instructors and program coordinators within the Workplace Literacy Field from across Canada were brought together, introduced to the concepts of action research, exposed to different ways of thinking and questioning, and then set loose on an unsuspecting nation: after two years, the ripples are still expanding!

## The Dofasco Experience

My research was based at Dofasco, Canada's most successful steel producer. Dofasco's advanced facilities in Hamilton, Ontario, produce high quality flat rolled and tubular products as well as a wide variety of processed steel products.

In 1997, Dofasco initiated the development of a Workplace Essential Skills Program to offer employees the opportunity to improve their literacy and technology skills. The company chose one department, Plant Services, to spearhead the initiative from within the company and contracted with a number of community-based educational service providers to design the curriculum and provide instruction.

Dofasco partnered with a local broker, the Adult Basic Education Association (ABEA) to coordinate instructional service providers within the Hamilton Community. This program has been highly successful and has continued to grow in both the number of students and variety of the courses being offered.

As the Dofasco program began to expand, it started to experience subtle changes or "growing pains" common for any instructional program moving from a small to a mid-sized initiative. My action research addressed this issue through an inquiry into instructor team building and its impact on program effectiveness.

## Instructor Team-Building

While working through the core processes of Action Research in the Dofasco context, it became clear to me that instructor team-building would be the main focus of the project. I designed an intervention strategy, developed success criteria, collected pre-

1. The group began with nine researchers and eight completed their studies. One person was unable to continue with the research study due to changes in the workplace but did participate in the brainstorming and discussion sessions with several of the projects.

Sheila Foye, a teaching assistant and Dofasco volunteer, works with Less Klodnicki, a Dofasco employee

intervention data and then implemented the plan. After the intervention was completed, I collected post-intervention data, processed the results and then spent some time reflecting on the entire process and sharing the results with other practitioners.

The intervention plan consisted of a series of team-building sessions for the instructors, including training and workshops provided by a professional team-building consultant (generously provided by Dofasco Inc.), and the development of a more formalized team approach to curriculum development and program delivery. The data collection and analysis were carried out using the techniques and protocols we developed with Dr. Taylor and outlined in the Action Research Handbook. The results were shared with the Group of Nine participants and several other colleagues before the final reflections and conclusions were developed.

From a strictly technical point of view, based on a comparison of the pre- and post-intervention data the answer to the question, *Can instructor team building increase the effectiveness of the program?*, is yes. This answer also meshes well with the intuitive understanding that two heads, or ten heads as the case may be, are better than one. There were two issues that emerged during the sharing and reflection portion of the project that add more depth to the technical results and can be applied to any workplace essential skills team that has more than one instructor.

## Issues of Importance

The first, and foremost issue, is the importance of communication between the Essential Skills Team members, the broker organization (if one exists in other contexts), the community providers, and the instructors themselves. It is imperative that the program, and any other instruction-based initiative, stand successfully on the strength of the curriculum and delivery methods based on the outcomes and skill development inherent in the courses and not on the personality or performance of individual instructors.

The second issue refers to the use of the brokering model with as many community providers as possible. While this model has its obvious benefits in terms of community involvement, accountability, cost savings to the employer, and public relations appeal, it is crucial to recognize its limitations as well. The greater the number and variety of providers, the more essential it becomes to ensure that all the instructors are involved in the team-building process. As the program continues to grow, its future success will be closely tied to how well these two issues are addressed.

*Building Teams for Better Success*, the final report of the Dofasco Action Research Project was actually only the beginning of the story. The instructor team at Dofasco and several of the Group of Nine participants have continued working together to streamline the team-building process as well as developing exciting new curriculum and outcomes for learners, volunteer-tutor training sessions, student tracking and evaluation materials. From a personal point of view, this experience has revitalized my passion for teaching adults in the literacy field and, working with colleagues that share that passion, bringing our best efforts for our students and ourselves…and having a whole lot of fun too!

**Pieter Toth** is the Program Coordinator for Adult-Based Continuing Education and Training Corporation, an organization dedicated to skills development and literacy in Hamilton, Ontario.

# An Assessment Procedure to Evaluate Retention of Learner Skills: Action Research

GRACE NICHOLSON

In the spring of 2001, Maurice Taylor approached Irwin Seating Company Toronto to participate in his national project funded by the National Literacy Secretariat on action research in workplace education programs. Reg Bernard, who was at that point Irwin Seating Company's Vice-President, was thrilled to participate and encouraged me to contact Dr. Taylor for further details.

Following completion of some preliminary readings and attendance at an informative as well as enjoyable two-day Action Research Workshop in Ottawa with the other project participants, we were asked to return to our workplace programs and implement action research methodology to investigate a question. After some guidance from Maurice Taylor, I settled on the following question: "How can I develop an appropriate assessment procedure to evaluate the retention of skills learned upon the closing of a long-term workplace training program?"

## Irwin Seating: A Long-Term Training Relationship

The program at Irwin Seating was, without a doubt, a long-term training relationship. In 1996, Irwin Seating, with employees numbering less than 100, launched an Essential Workplace Skills program following a comprehensive needs assessment of the company's communication skills that was conducted by the Etobicoke Board of Education's Workplace Training & Services Department. To show their employees the company's genuine commitment to learning, all classes were held completely on company time.

Working with the organization, we determined the program's framework and learning outcomes. Thirty employees took part in one or more of a series of programs that were offered: Essential Workplace Skills (200 hours); Essential Workplace Skills: Basic Level (100 hours); Effective Communication in the Workplace (200 hours).

When the last training group finished in July 2001, I began to consider how to develop an assessment procedure to evaluate the retention of learner skills. The term "assessment" usually brings to mind formal testing; however, I wanted to develop a more robust assessment procedure. One of my concerns was that given the program's length and cost, concluding the training with the requisite handing out of certificates and shaking of hands would be a weak finish given that a four-year training relationship had been established. If there were no assessment mechanism in place, it would be all too easy for Irwin Seating Toronto to ask, "What was all that training for?" To avoid this possible dissatisfaction and disillusionment, I believed it was critical, as a training provider, to put an assessment procedure in place to ensure post-training customer care.

## Data Collection and Analysis

In order to determine the best methods for the training participants to retain their skills, I collected data in a variety of ways: I reviewed all of the participants' mid-program progress reports; conducted a series of interviews with the President and Vice-President of Manufacturing of Irwin Seating Toronto; and finally, distributed questionnaires to program participants as well as some of the employees outside of the training program. I then sorted the data into one of three groupings: what the training participants were saying; what those outside the program were saying; and what the future needs of the organization were.

Training participants proudly identified a wide variety of situations in which they could practice their oral skills — both social and work-related. Those outside of the program recognized the need for the organization to provide the participants with as many opportunities as possible to utilize the skills they had acquired. The rate of participation in company initiatives could serve as a key way to assess the retention of learner skills. What were the future needs of Irwin Seating Toronto? As with other growing organizations, there was a need for effective communication at all levels of the company. As a result of their growth, other business forces, and a keen desire to integrate business practices such as Lean Manufacturing, Irwin Seating's management identified a need to formalize its policies and procedures.

## New Company Initiatives

In analyzing all of the data sources, a common action strategy emerged. Irwin Seating Toronto decided to institute company initiatives that would provide training participants with opportunities to utilize their communication skills. The rate at and manner in which employees participate in the company initiatives would ultimately serve as the benchmarks for the assessment. Irwin Seating Toronto pursued the following initiatives: publish a company newsletter, *Toronto Talks;* revitalize the employee council, *Irwin Communication Team;* write and distribute an Employee Handbook with the assistance of the Effective Communication in the Workplace program participants; install electronic sign boards in the plant and office areas; utilize written surveys on an on-going basis to solicit employee input; and revise the Performance Appraisal system to include Peer Reviews with Production employees.

Early indications show that employees are participating in these new company ventures. Recently, the President made an interesting observation on the effectiveness of the company's initiatives in assessing skills. He recounted that in the fall, they held their company barbeque. Together with the President, employees from one of the manufacturing departments organized the event. He proudly spoke about how effortless it had been to communicate with the employees, and how he could not have done something like that a few years ago. It solidified in my mind the power and appropriateness of instituting company initiatives as a way to assess employees' skills retention. As Irwin Seating Toronto continues to provide opportunities to engage employees in a learning culture, they will be able to regularly monitor and assess their newly acquired communication skills.

**Grace Nicholson,** a Training & Communications Specialist in the Human Resources Department of a Magna International division, has worked in the field of workplace training for the past 15 years.

# Plain Language: Its Effect on Organizational Performance

ROSE GROTSKY

Leading organizations worldwide have identified clear documentation, internally and in the marketplace, as a performance improvement and quality initiative. More specifically, they are using a plain language approach to communication to help improve operations and service quality. A spokesperson for the Alliance of Manufacturers and Exporters Canada remarks:

> *"We need to look at all areas where we can improve. Although we've been prepared to spend millions on new equipment, we've been reluctant to focus on hidden issues. We often blamed workers, instead of ensuring that they received clear and accessible information."* (Grotsky, 1998, p. 13)

## Measuring the Value of Plain Language

In recent years organizations have begun to cost-justify their investment in improved documentation by measuring and reporting economic benefits. For example, they are calculating reduced costs resulting from improved productivity.

Federal Express used plain language principles to reorganize, redesign and rewrite its *Policies and Procedures* manuals. By improving the search time of employees in Ground Operations, Federal Express reports at least $400,000 (U.S.) a year in productivity gains. (Grotsky, 1998, p. 29)

Companies are also measuring *increased benefits* resulting from a stronger relationship with customers.

Australia's Royal and SunAlliance overhauled its home insurance policy and application form. Concerned about the gap between the language in its policy and the language understood by customers, the company saw its plain language initiative as a vital part of customer service. Royal and SunAlliance calculates a greater return on investment because it returns fewer incomplete forms and is able to process more applications immediately. (Grotsky, 1998, p. 39)

## It Was Just a Matter of Time in Canada

In 1998 Toronto-based Praxis Adult Training and Skills Development published *Get to the Point: A Strategy for Writing Clearly at Work.* The guide presented a business case for using plain language. To prepare *Get to the Point,* we contacted over 100 business and union leaders, employees, industry associations, sectoral councils and workplace literacy practitioners in eleven sectors and industries worldwide to identify organizations that had used plain language to improve performance.

Although our research revealed that some Canadian organizations had implemented plain language *activities*, most of these activities had been short-term and on an *ad hoc* basis. In general, they had neither received a strong and continuous commitment from top leadership nor had been strategically linked to corporate goals

and business objectives.

Furthermore, Canadian companies had neither *systematically* studied how plain language had contributed to their operations nor isolated and measured *how much* value plain language had added.

## Our Response to the Need

With a grant from the National Literacy Secretariat, Praxis is piloting a groundbreaking pilot project. We are systematically studying the *business impact* of introducing plain language in the Canadian private sector. We intend to demonstrate the influence and positive effects of plain language on organizational performance and the corporate *bottom line*.

Our overarching goal is to convince Canadian businesses to:

- change their attitude toward using a plain language approach to communication;
- allocate resources for plain language over the long term.

## A Snapshot of Our Approach to the Project

For our *experiment* Praxis has partnered with two large Canadian companies in the telecommunications and financial services industries. We put together an interdisciplinary team of experts in plain language, on-line documentation, usability, measurement and evaluation, financial analysis, and organizational change to develop and implement two document revision initiatives.

Our team created an analytic framework to compare how intranet documents at each company perform before and after we improve them. Specifically, two groups of end users of the documents at each host company were observed. One group used the original documents, and the other group the plain language versions.

Currently we are comparing differences between the groups in a variety of performance measures to determine whether or not benefits might accrue to each company as a result of our plain language interventions.

*Quantitatively* we expect that using plain language documents for internal online communications will show tangible benefits to each company by reducing costs and improving user performance.

*Qualitatively*, we expect that the benefits of using plain language documents will include greater employee satisfaction and a willingness from each company to modify current documentation practices.

Finally, we anticipate that the process of conducting the study in each company will result in a change in organizational attitude toward plain language as a better way to *operate*.

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# Behind the Mask: Researching Literacies and Identities in the New Workplace

CRINA VIRGONA AND PETER WATERHOUSE

We write from the antipodes. We operate, as practitioner-researchers, from a small private company. We are about as global as our local fish and chip shop. However we very much emulate the philosophy of "acting locally and thinking globally" and it is in this vein that we research, write and read professionally. Let us tell you briefly about some research projects we have conducted over the last 18 months.

## Generic Skills and the Displaced Worker

One project was on generic skills and the displaced worker (Virgona et al., 2002). This project attempted to pick up on the discourse of generic skills championed by employer organizations and skills management groups, and to find out how this discourse resonated with experienced workers as they re-entered the job market. "Generic skills" has come to mean many different things. Recently it has become the catch phrase that fills the gap between technical competence and total commitment to company and logo. This employer-driven discourse encroaches on the dangerous territory of employee values, attitudes and beliefs which it attempts to name, prescribe and measure.

In our research, we wanted to understand what generic skills meant to displaced workers, how they had developed and applied their skills and how they adapted them. The project uncovered issues of labour market bias and disqualification; of skills shifts in response to global work cultures and the remodeling and re-naming of skills as job seekers read the job market. We were interested to observe the slippage of the discourse between policy makers and practitioners as they vie to control, name and embrace "new" generic skills and behaviours. Most practitioners believe that generic skills can be understood and developed only in the context of the workplace. Policy makers however use the term as if skills were autonomous acquisitions that are transparent and transferable. We concluded that both uses of the term have value but can mislead the community in their understanding of the nature and application of skills.

That project is finished now and the report is with the publishers. It will become available through the National Centre for Vocational Education Research (NCVER), the research arm of the Australian National Training Authority (ANTA) (www.ncver.edu.au).

## Use and Value of Qualifications to Employers

Our other significant research project last year investigated the use and value of qualifications to employers (Townsend *et al.* in press). The researchers ventured around Australia in rural and city locations, in small and large companies, seeking answers from employers about their attitudes to Vocational Education and Training (VET) and qualifications. Predictably it revealed an

ambivalence. There was the usual concern that specialist skills are not thoroughly addressed, or not addressed at all, as was the case with the surf board manufacturer. On the other hand there were those who found that VET training allowed them to develop skills within their workplaces with a level of interpretation that served the interests of all parties. This project was likewise funded by NCVER and the report will be available on the above website in time.

## Workers in a Changing Work Environment

Both projects fed our continuing interest in the nature of competence, who has authority to define it and how it is policed. This is the common thread between the two projects, but it is also central to our new and current study. This project, under the banner of the Australian Literacy Research Program, is based upon the knowledge that the Australian workforce is becoming increasingly casualised. (Australia boasts a figure of 41% of the workforce who are not permanent employees.) In the past, workers with literacy dependencies were supported through staff networks in dealing with challenging literacy tasks. They were often "buddied" with people who could help. In a casualised workforce these relationships may not be possible.

A further complication for vulnerable employees is that the literacy demands are increasing. Our economy is wedded to policies of outsourcing work and managing suppliers through rigorous auditing systems. These trends are particularly observable within the industries of aged care and food manufacturing and preparation. Both these industries have been the subject of considerable litigation as a result of food poisoning or inadequate care. As a result, issues of risk management have become synonymous with quality management and exercise dominance over concepts of competence, and hence literacy, in these industries.

Within this environment, our project has set out to investigate how workers, particularly contingent workers, manage within this changing work environment in the two identified sectors. As is often the case, the deeper our involvement the more new questions arise. The central issue that is beckoning to us is how key texts in industry are interpreted to define competence, and literacy as it is embedded in competence.

## Aged Care Industry

Aged care is an industry that has been managed and staffed mostly by older women motivated by humanitarian concerns. They have worked in autonomous ways within a community of practice particular to different facilities. Those days are gone and people whose primary motivator was heart-based are being replaced with people who are systems driven. The accreditation document that authorizes institutions to operate and receive government funding is, in many ways, a document that values humanitarian concerns. It talks about the need for aged care residents to determine their own futures. It respects individual autonomy and the ideological and lifestyle affiliations of residents. But it is read and enacted in very particular ways by auditors and facility managers. Under new management philosophies, set practices have been defined as the interpretation of the principles and often, those practices leave little room for initiative or authentic personal interaction.

Workers at one institution talked about the robust interaction of years gone by that has now been sanitized and scripted. They sense that their personal commitment, caring and investment must now be hidden

behind an impersonal mask which purports to professionalism and quality care. Some feel the authenticity of their work being compromised (Waterhouse et al., 1999). The "loves" and "honeys" and "darlings" that were endowed spontaneously in the past have been replaced by "Mrs. B" or "Mr. A." Terms of endearment and first names are now said to be disrespectful unless negotiated beforehand. And the kisses and hugs offered by some residents are now censored for their potential to be intrusive and violating, threatening the professional relationship between residents and carers. Aged care workers recognize that the "no-lift" policy is essential for their health but they struggle to reconcile this with the recommended lifting machines. One nurse bemoaned:

> *I can't help thinking of those cranes at the port that pluck out the cargo from the hold and carry it dangling over to the wharf.*

While risk managers seek out all points of possible vulnerability to legal suits, residents may perceive themselves reduced to noxious bundles of flesh.

There is no doubt that new measures have been important for the protection of residents and staff, but one wonders at the price and the alternatives. The government-endorsed readings of the accreditation texts have established such weight that employees are afraid to deviate in case they expose themselves as incompetent or threaten the accreditation of the institution. Of course when backs are turned and authorities are out of earshot, workers sometimes remove their enforced masks and break the rules. However there are few who do not believe that their interaction is mediated by a very big brother. The social consequences of this have been discussed by writers such as Sennett (1998), Wilmott (1993) and Saul (1995), who believe that the intrusion of controls into the personal interaction and belief systems of individuals invades personal autonomy and ethical identity.

The implications for this on casual workers with literacy needs is only marginally more interesting than its impact upon the industry, individual workers and residents. All workers need to develop a command of the literacies and the communication practices that the key texts call for, or rather their interpreters expect to see. We are still in the midst of data gathering and so far our venturing has not taken us outside the aged care industry. Conclusions are yet to be drawn. Let us see where the study leads us.

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**Crina Virgona** and **Dr. Peter Waterhouse** are experienced practitioner-researchers who, with a group of colleagues, own and operate Workplace Learning Initiatives Pty. Ltd, which provides accredited training, research and consultancy services from Melbourne, Australia.

# Something to Hang Your Coat On: Learning in a Food Manufacturing Company

CHRIS HOLLAND

This paper discusses relationships of power at a manufacturing workplace, and how these impact on literacy provision. Drawing from current theories in the New Literacy Studies (see for instance, Gee, 1996; Street 1984, 1993, 2001) the paper examines transitions from a traditional to a "high performance" culture, particularly in regard to training initiatives. It explores workers' literacy practices associated with company high performance initiatives, health and safety and training, and what this means for literacy practitioners.

## The Food Manufacturing Company

Originally family owned, this company was taken over by a consortium in 1995, and has since made significant attempts to build a culture of "shared goals." However, a culture of surveillance and mistrust pervades. There is also evidence of deep seated resistance, not so much to high performance goals, but to the perceived "doublespeak" of management in terms of these issues. Gee (1996) and others (Gowen, 1992; Lankshear, 1997; Hull, 1997) have written extensively about implications for workers of the so-called "quality revolution" promoted by management gurus (Peters, 1992, 1994). The workers in this company voice scepticism about "improvements." They display a genuine interest in quality, particularly through the proper adoption of health and safety procedures, and training.

## Investing in People

This company's primary customers are multinational companies in the UK and Europe. One of the ways a company can indicate to local and international customers that it can produce high quality goods is to achieve the Investors in People award. Companies receive this award when they can show that they have invested in the training of all sectors of the workforce, that people learn and develop "effectively," and that learning is linked to external qualifications "where appropriate." Most companies in the consortium have already gained the award.

## Learning the Ropes

There are a number of training initiatives that shop floor level workers must undertake in this company. The first is a 3-hour induction for job applicants who may or may not be accepted as employees. The stated aim of the induction is to "provide new starters … with a range of essential information regarding the Company's rules and regulations." The induction takes around three hours, and includes a short talk by a union representative in the company, a video (2 hours, 50 minutes) with breaks to answer three written questionnaires checking applicants' understanding of the video material, and a short factory tour.

Those who are recruited are employed on a temporary basis. The second training for these people (and the first as employees)

is computer-based training, comprising ten modules on health and safety. All new starters complete an interactive computer programme in their first weeks of employment. They complete the programme at their own pace, which can take up to three hours, as for some there are computer skills issues and for others, language issues. This training takes place in a private room.

The third essential training for new starters is face-to-face individualised supervision by a co-worker who has been appointed a "training buddy." The company aims to have a training buddy for every shift and every operations area. New starters are given between two and five weeks to "learn the ropes" and may be dismissed if they are unable to manage their tasks quickly and efficiently enough after this period.

The fourth training initiative is less direct. It involves the development of training manuals to be used in each department (eventually to become the basis of National Vocational Qualifications (NVQs) training). In order for the manuals to be developed, two shop floor workers who were considered to have the appropriate abilities for the task were appointed as "training co-ordinators." The manuals were duly developed and distributed to supervisors for use with shop floor workers including operators and charge hands.

Finally, the company has taken advantage of the Union Learning Fund, set up by the Government in 1998 to build "basic skills" (language, literacy and numeracy) competence in the workforce. In cooperation with the local union and further education college, it has set up an "Opening Doors" programme for workers. The programme is promoted to shop floor workers by the union and the two "union learning reps" appointed by the company.

## "Buying" the Ropes

Gaining "buy-in" to company goals is a clear objective of this company's management. One of the most obvious signs of this is the erection of huge billboard sized wall displays of Key Performance Indicators, Continuous Improvement and Health and Safety news. These boards are aimed at informing workers of the organisation's goals and progress towards them, and achieving "buy in" to that vision.

These boards display "Key Performance Indicators" for efficiency, waste, service, quality, health and safety. These are charted in complex graph form, against

targets set by the continuous improvement teams. Management requires all workers to attend regular briefings which are given by supervisors in front of the boards. However, there is intense competition between departments to set and meet higher and higher production targets, so finding time for such meetings is not a priority for supervisors. As well, the noise of the factory floor means that briefing sessions are ineffective. The supervisor can not be heard, and even if he could be, the graphs and other information are too dense and unclear. A clear message that training is less important than production targets is given by production information being presented graphically with monthly targets while training information is presented as a narrative, with no targets.

In another attempt to gain buy-in, the company invites/expects workers to participate in a "suggestion scheme" whereby suggestions for improvements are submitted on a monthly basis, with the possibility of winning a reward for the best suggestion. However, the suggestions that are accepted are those which boost production rather than those which attend to quality or training concerns. These and other initiatives have significant implications for language and literacy practice, and necessitate training support from the organisation:

- Participation in briefings about targets set for each key performance indicator
- Contribution to improvements through a "Suggestion Scheme" and team meetings
- Provision of information to the company about safety issues through completion of a "Near Miss" form, and at team meetings
- Sharing of information with co-workers and new starters about work routines, shift changeovers, downtime, etc.
- Negotiations and paperwork for those who have been appointed as "training buddies"
- Noting and reporting machine faults and breakdowns
- Recording statistical information (e.g., production numbers) on in-house computer system

## Rhetoric and Reality

A picture is emerging of management immersion in quality rhetoric and workers experiencing the mismatch between this rhetoric and the reality on the shop floor. A training buddy's requests for a slowing of the line during training are repeatedly refused. She refuses to complete a new training form which requires her to state her opinion on whether the company should continue to employ the individual she has been training. She believes the training period is insufficient and the conditions for training are inadequate (she is often not allowed time off her line to train).

Despite management talk of openness and democracy, fear of job loss is high. The health and safety representative explains:

> *…a lot of people won't open up, they will not, they know that they're often being asked to do things that are wrong but they would not say, sorry I've had training and I'm not supposed to be doing that, they just say, yes, right, okay. They're intimidated, they're frightened…of them saying well if you don't like it, you know where you can go then. …No because they're all temporary jobs when they come in. Nobody gets a permanent job when they come in unless it's advertised as a permanent position. There's a lot of insecurity down there.*

She also sees that the quality talk isn't matched by follow-through and consistent efforts on the floor.

> *I worked on the floor and you don't see meetings, you don't see the Investors in People, you don't see personnel, you don't see anything, you just see the daily, daily thing that you're doing, and if you can't see anything changing then you don't think anything's being done because no body could even care less…You get a team brief, but it's the consistency and the continuity, it doesn't follow through like it should do.*

Finally, in her role as a trainer, the safety representative recognizes the mismatch between what's written in a manual and how the work actually gets done.

> *I've always said to people I wouldn't ask you to do it if I couldn't do it myself, so I was very reluctant to train out something that I didn't know nothing about and I came up against it in the next shift. …I tried to train a guy up on what they call a 'kibbler,' it's a machine that mixes, and I'm trying to explain to him that you have to do this and you have to do that and he said to me, 'Do you know anything about kibble?' I said, 'No, I don't, I only handle health and safety, but this is what it says,' and he says, 'Oh, that's all right on paper.'*

## Literacy is a Social Practice

As the safety representative's transcript shows, she has severe problems with the way she is required to train people. She believes that talking about the work, and building trust and rapport is an important aspect of training, and she is aware that manuals may differ from what people actually need to do.

> *I get into an awful lot of trouble for stopping and talking to people. You haven't got time to do that. …I'm educating them to come, to get… my way… across to them, not that I change their minds but I might just put a little seed of doubt in their minds, and they'll think well she might be right, we'll give it a try.*

In another example, Maureen and Patsy, both operatives, are now in charge of writing operating manuals for the whole plant. They succeeded in their interviews for these jobs because another operative took confidential copies of the job descriptions to them well before the interview.

> *She told me when the job will be advertised on the notice board so all the paperwork she got on the training co-ordinator she gave me, whether she was suppose to or not I don't know, but it was like inside information for me. So I read through it all, basically knew what they were going to ask questions about.*

The computer-based development of training manuals takes up most of their time. Both women feel they would be better employed working to support the training buddies and new starters on the shop floor:

> *I think we should be based on the shop floor, for easy access for the training buddies and anyone else. …I think it's daunting that if you can't do a job you don't know who to ask about it.…I don't think the operative would know where to work in a training manual, if they wanted to look anything up. And it's a lot easier for me to go out on the line and show somebody how to do something then find it on a piece of paper, and say read through it.*

The job description did not mention computer skills. Maureen has taught herself well to use the computer, and, through the union, enrolls in a funded computer course at a local college. She creates Power Point presentations ridiculing management actions and disseminates these to trusted co-workers; she changes files of instructions which she thinks are counter to the effective running of the shop floor; and she teaches her co-worker the computer skills she needs to keep her job.

## Conclusion

This story is a story of training that could have benefited the whole company, including workers and management, going wrong because in the end, it was just "something to hang your coat on," window dressing for the customers.

The boards were inaccessible to workers in terms of time and space, but also in terms of the way information was presented. Workers had issues with quality and training, but these issues were not rewarded, and so few made suggestions. While workers managed the paperwork, there were several instances of workers choosing not to complete or to complete differently from expectations in order to protect themselves or co-workers, or to make work more efficient. People were disillusioned with management doublespeak around quality and training, but didn't speak up for fear of job loss. Mostly they supported each other to find other ways to get the job done and to maintain or improve their positions and training.

Workers in charge of training demonstrated that literacy is a social practice, but found their ability to use and develop literacies on the factory floor were limited by supervisors and line managers focused on production targets.

This research has important implications for literacy practitioners working in companies with shop floor workers. At face value, the fact that people could not/did not read graphs, did not complete forms or completed them "wrongly," and didn't use manuals, for instance, could lead a practitioner to believe that these people had literacy skills deficits. This research shows that it is essential that practitioners spend time talking with workers about their work (and what they can do), not just about their "literacy skills needs." Without some picture of the issues on the factory floor for workers practising literacy, practitioners will at least get the "needs" wrong, and will at worst alienate the very people they are wanting to assist.

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# Reading Work: A Social Practice Approach to Workplace Literacies

NANCY JACKSON

> *To be literate in a workplace means being a master of a complex set of rules and strategies which govern who uses texts, and how, and for what purposes. [To be literate is to know] ... when to speak, when to be quiet, when to write, when to reveal what was written, and when and whether and how to respond to texts already written...* (Hull, 1995, p. 19)

*Reading Work: Literacies in the New Workplace* is a forthcoming book about workplace literacy in Canada. It explores the idea that being literate means not just reading and writing or performing tasks with print, but actually understanding the meanings and participating in workplace activities as a full member of a social group. It paints a picture of workplaces as complex communicative environments full of agreements and disagreements, satisfactions and dissatisfactions, participation and resistance, confidence and apprehension, and risk and opportunity related to changing work requirements. Literacy is at the centre of this story of complexity and change.

The book is written by a group of workplace educators and academics[1] who did ethnographic research in four quite different work sites across Canada: a food processing plant that supplies the international fast food industry; a textile factory that makes specialty products for international markets; a state-of-the-art tourist hotel that is part of a multinational chain; and a high-tech metals manufacturing company that makes parts for a world market.

Each researcher in the In-Sites group spent from eight to ten months in one of these workplaces, got to know people and their work, and listened to their stories. Our goal was to look systematically at what people actually do and what they understand when they participate in various literacies in these workplaces. We also wanted to know what is happening when people do not engage with these literacies, even though they are expected to do so. Through this kind of close-up exploration of front-line experience at work, we have tried to understand the nature of literacies at work and what they mean from the point of view of people actually doing them.

Of course, we discovered that there is not one answer to these questions. There are diverse and sometimes conflicting answers, depending on where people are located in the culture and power relationships of the workplace. That's why we became more and more convinced as we went along of the power and significance of a social practice approach to understanding literacy.

1. The In-Sites researchers and authors of the book are: Mary Ellen Belfiore, Tracy Defoe, Sue Folinsbee, Judy Hunter and Nancy Jackson.

## From Skills to Social Practices

For nearly two decades researchers, theorists and innovative educators around the world have been talking about a major shift in thinking about the nature and meaning of literacy. They have moved away from defining literacy narrowly as the technical skills of reading and writing. Instead, they are stretching the meaning of the word to include the many ways that reading and writing are interwoven with knowledge, practical activities, social relationships and cultural meanings. They see "becoming literate" as intimately bound up with how children and adults learn to use texts and images in daily life, as an integral part of participating in schools, families, workplaces and communities. This broader view treats literacies as plural and as complex, cultural and social practices.

We have found the metaphor of a tapestry very helpful in grasping these ideas. A tapestry has multiple threads, densely interwoven to make a whole cloth with a pattern that is inseparable from the cloth itself. Without the threads, there is no pattern, no cloth, no tapestry. And conversely, if one strand is pulled out of the tapestry, it becomes "just" a thread. It loses the meaning and beauty it has as part of the weave. These same ideas can be used to understand literacies in the workplace. A whole working environment is made up of many threads, including literacy threads. But if individual literacy threads are pulled out of their place in the weave of everyday working life, they lose the meaning they have as part of the whole.

This idea is remarkably simple, yet complicated to apply in practice, especially when it comes to learning. But it is essential, because when the everyday meanings are stripped away from literacy practices, it turns out that so are many of the conditions needed for their effective learning. This is a serious dilemma for all stakeholders in the field of adult literacy.

## Changing Work, Changing Meanings

Meanwhile, workplaces too are under enormous pressure for change to survive in conditions of increasing international competitiveness. New electronic technologies and new management methods have brought an avalanche of new "texts" into workplace life. Examples include computerized manuals and records of Standard Operating Procedures; software programs providing a script for employees interacting with the public; and intensified use of visuals like charts, tables, graphs, symbols, and photos, all in addition to greater use of traditional modes of communication like bulletin boards and chalk boards.

It is conventional to interpret many of these workplace developments as evidence of higher skill requirements. Most current literacy policy follows from this assumption. But our research investigates this assumption more closely, focusing on the nature of these changes and their implications for both literacy learners and teachers. We discovered that as work changes, so do the nature and meanings of literacies in all kinds of working environments. This challenges us as educators to become more "workplace literate" as well.

In taking up these ideas, we are following in the footsteps of many researchers before us who have warned against relying too heavily on prevailing views of skill requirements as the starting point for understanding what it means to be literate in the workplace. They argue that starting with this notion abstracts people's actions from the situation in which they take place.

This makes workers appear as isolated actors and skills appear as strictly individual traits, rather than as threads that take their meaning from a weave of workplace culture and social relationships.

*Reading Work* is about this journey of discovery of workplace literacies as social practices. The book is in two parts, and speaks with several different voices. **Part One** presents stories of literacies-in-use in the four research sites, as told through the eyes and the voice of our own experience doing ethnographic fieldwork. In **Part Two**, we put back on our familiar hats as workplace educators and academics and try to share our reflections on what we have learned, and what we hope others may learn, from these workplaces. An **Appendix** offers a narrative account of how we did our research and how we handled some common hurdles in ethnographic research methods.

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SECTION 3

# Workplace Literacy Programs and Materials

# The City of Winnipeg and CUPE Local 500 Success Story

KATHY TODD AND RHONDA TONE

The City of Winnipeg and the Canadian Union of Public Employees Local 500's (CUPE L500) Essential Skills program has exceeded everyone's expectations. The highly successful Essential Skills program is open to all City of Winnipeg employees who are members of CUPE L500. Our program just completed its second year of operation and had over 150 participants, double the number that participated in the first year. This program had the honour of being the recipient of two CAMA (Canadian Association of Municipal Administrators) awards, specifically for "Development of Effective and Successful Partnerships" (2002) and for "Creative Design of Workplace Education Programs" (2003).

The courses being offered in the 2003–2004 program are:

- GED Preparation — twice a week for 22 weeks
- Introduction to the GED — twice a week for 22 weeks
- Math Skills — once a week for 26 weeks
- Reading and Writing Skills — once a week for 26 weeks
- English as a Second Language — once a week for 26 weeks
- Introduction to Computers (3 levels) — once a week for 10 weeks
- Study and Test Writing Skills — once a week for 4 weeks
- Academic Essay Writing — once a week for 4 weeks
- Introduction to Accounting — once a week for 10 weeks
- Basic Skills for Public Works Spare Foremen — once a week for 8 weeks
- Oral Communication Skills — once a week for 6 weeks
- Interview Skills — once a week for 6 weeks

This success story was born on May 12, 2000 when the City of Winnipeg and CUPE L500 negotiated a $3 million Education Training and Staff Development Fund in their Collective Agreement. This resulted in a Letter of Understanding that created a joint management/union committee to administer the fund. This Joint Union/Management Committee on Education, Training and Staff Development, known as the Joint Committee, consists of six Management members and six CUPE members. The Joint Committee reports to a Senior Steering Committee made up of the Mayor of the City of Winnipeg, Glen Murray, the City's Chief Administrative Officer, Gail Stephens and Paul Moist, the President of CUPE L500.

The Essential Skills program is coordinated by the *Essential Skills Sub-Committee*, which reports to the Joint Committee through its Chairperson and has a budget of $150,000 for three years. *The Essential Skills Subcommittee* is made up of City employees who are members of

Learning together in one of the popular computer courses

CUPE L500 and is a working committee. It is responsible for all aspects of running the program from recruitment of participants, hiring educators, determining programs, purchasing books and supplies, and monitoring the program to planning the yearly Celebration of Learning event.

## Why Are People Participating in the Program?

When asked, learners offered three reasons for their participation. The number one reason for participating is for personal self-improvement. "I never thought it would be possible for me to obtain a GED," stated a learner. "It has opened up a whole new world to me now that I know I can learn. My self confidence has just soared!" The second reason given by learners for participating was to become role models for their children. One learner stated, "How can I expect my kids to get their grade 12 if I don't have it?" A third reason given for participation was for promotional opportunities. The "educational bar" is being raised throughout the organization and learners are finding that they need to develop new skills and obtain new certifications. Many positions now require a Grade 12 or GED certificate. A very timely example of new certifications is the mandatory requirement to certify Water workers. In Manitoba, the requirements for certification of Water Workers have not been established but we know there will be a large number of workers who will have to raise their level of reading, writing and numeracy skills.

## What Did Learners Like About the Program?

On the evaluations learners expressed three reoccurring themes as to why they liked the program. First, they liked the friendly, supportive atmosphere that was created. Second, they liked being able to work at their own pace and that no pressure was placed on them. Third, they liked the excellent educators. "The classes are so different from when I went to school," stated one learner. "If it was set up how it was when I went to school I would have quit!"

## What Are the Benefits of This Program?

This program is still in its infancy but benefits are already being realized. The most obvious benefit is that learners are achieving their GED certificates and earning Certificates of Participation. This has already resulted in people being promoted within the organization. After having received a GED certificate a learner stated, "I not only applied for a job that I couldn't apply for last year but I actually got the job!" Other very important, but less concrete benefits are also being reported. People are saying that they now have more confidence in themselves and feel much better about their


**ESSENTIAL SKILLS DISPLAY:** the booth set up by the Essential Skills Subcommittee. Committee members are wearing graduation gowns and giving out small diplomas (information on the program).

**FRONT:** Kathy Todd, Karen Byzuk, Karen Ross
**BACK:** Susan Szabo, Marilyn Cooper.

jobs. Participants are also saying that they have more confidence in what the future will bring. A culture of continuous learning is being developed. Participants from the first year are now moving on to higher education. Without the Essential Skills program to "kick start" this process it is doubtful that these individuals would be where they are today.

## What is Included in the Broader Joint Training Programs?

The education and training offered by the Joint Committee falls under three broad categories. The first category is **Department Programs** where Departments submit proposals for funding that provide training specific to their needs. Examples of this type of training are Concrete Finishing, Arborist License and Property Assessor Training. The second category is **Individual Training.** This takes the form of a scholarship program that allows individuals to apply for funding. Examples here include University and College courses, Golf Instructor and Conflict Resolution. The third category of training is **Global Training.** This is training that benefits the whole organization and is open to all City of Winnipeg employees who are members of CUPE L500. Examples of Global Training include the Essential Skills Program as well as the E-Learning Centre, Career Planning and Respectful Workplace.

## What Does the Future Hold?

The future looks bright for the Essential Skills program. A new three-year Collective Agreement has been signed which includes a renewed Letter of Understanding for Education, Training and Staff Development and an additional $3 million in funding. The Essential Skills curriculum has been expanded for the 2003–2004 year and 140 applications to the program have been received in the early stages of recruitment. "This program is just wonderful and has opened up a whole new world to me," stated a learner at last year's Celebration of Learning.

**Kathy Todd** is a CUPE Local 500 executive member, a member of the Joint Committee for Education, Training and Staff Development, and also the Chairperson for the Essential Skills Committee.

**Rhonda Tone,** Manager of Human Resource Development, is the City's Chair for the City/CUPE Joint Committee on Education, Training & Staff Development.

# A Workplace Program Takes a Different Approach to Learning at Work

RUTH FARRELL AND TRACY DEFOE

## Who and What is Team Time?

Team Time is a project of Canadian Manufacturers & Exporters BC Division and Teleflex Canada Ltd. Team Time is a training model that combines Continuous Improvement content and methods with experiential team learning. Tracy Defoe and Ruth Farrell, two workplace education consultants working with Teleflex Canada, are the educators behind the Team Time model. The National Literacy Secretariat, Human Resources Development Canada, provided a grant for about half the costs of the model development and a Steering Committee guided the project.

Team Time's goal is meaningful participation for everyone. Specifically, the overall goal is to develop and pilot learning activities and materials that will work to support learning in a workplace undergoing changes toward becoming a Lean Manufacturer.

Team Time follows a participatory approach to developing materials. We tried to make the materials and the experience of being in the sessions more "pull" than "push." We see a need for many kinds of learning groups, and we know that often coaching one-to-one or small group teaching to support Team Time is essential. Finally, Team Time has goals to support people to be teachers and learners at work.

> ***Team Time's goal is meaningful participation for everyone.***

## Team Time Sees Workplace Literacy as Social Practice

- Different points of view are real and often valid.
- Where change is rapid and ongoing, questions are more lasting than answers. At the same time, we are not starting from zero. People already know a lot. In the Team Time approach, we acknowledge and draw out what people already know, what they have learned through work experience and what they believe.
- The model is based on adult learning for high retention — and it teaches about learning styles and preferences so that the activities are reasonable and the purposes apparent.
- Everyone has multiple roles and many things to learn.
- Team Time draws on real situations and real working groups.
- Materials can be developed only by the teamwork of a diverse group of people. Customization and revisiting material is always necessary. Team Time assumes continuous improvement and revision.
- Many people need individual or small group support to be able to participate in discussion, documentation, Intranet use, reading and interpreting data and other workplace literacies.

## A Practitioner's View: Building Participation Stretches Creativity

### RUTH FARRELL

Our primary goal as workplace educators is to build participation at work: to make conversations, meetings, informal learning and formal training times and places for people to get involved, to understand new ideas and share their thinking and suggestions for improvement. From this goal comes the moment by moment opportunity to learn more about the employees and how they learn as individuals and group members and to build meaningful, relevant learning activities and resources. Even the company as a whole is like an organism that has certain learning predilections, certain strengths and soft spots. This becomes a highly dynamic and creative work process: each day we listen with intent to synthesize the current learning and communication realities of workers and managers with our current (teacher's) understanding of education theory and lean manufacturing principles.

Embedded in the complex structures of workplaces are the differences of education, job tasks, autonomy and communication expectations. Embedded too are the abiding commonalities of working in groups and the urge to improve work and communication processes. In a very basic way we work to reveal the commonalities and find ways for employees to work from their strengths, thus building the learning and growth potential for the whole workplace organism.

Much of our teaching activity takes place in informal conversations in hallways, on the shop floor or in the office of an manufacturing engineer, a quality inspector, a shipper/receiver or a production manager. We coach, we mentor, we encourage and we laugh. Often production stress overwhelms our capacity to schedule and run regular group sessions. But when we do get a group scheduled for 1 hour to meet in a room, we try to set up the best learning environment we can for that sixty minutes. Considering who will arrive, we might move the furniture, plot for optimal grouping of participants, inject colour and tactility with props, Post-it® notes, felt pens, digital pictures of work, training and workers. We plan and choreograph every one of those sixty minutes so that the participants feel comfortable while being offered the chance to take up a learning challenge and to share their knowledge with other people in the room.

We often start with word cards. Sets of six or eight cards with one word written on each have become one of our standard tools for building group participation and understanding. Sometimes we give a card to each person, sometimes we ask them to each take one — whichever

Ruth Farrell leads informal learning on the shop floor.

they want. Sometimes we stand in a circle each holding our card, sometimes the cards are spread out randomly on a table around which we all stand. Then we share what we know of these words and learn all the different perspectives on the words, we flesh out the current state of the group's understanding and we build a strong platform for learning. Sometimes we then go out to the work areas to look for examples of these words — in pairs or small groups — and again we learn more about perspectives and how people are currently applying their thinking.

Our efforts to find and share common meanings, choreograph group work and appeal to different learning styles serve two educational purposes. Employees and work groups get the chance to understand and remember training events and they get the chance to express their current state of interest and need. With these educational tools we glean more stories as we ceaselessly listen and gauge which words and concepts have the most resonance to take the work groups to their next learning challenge. It is an intense and ongoing creative process — and I love it.

Tracy Defoe and a group of machinists explore what they know about Continuous Improvement ideas like "adding value" and "metrics" with word cards, chocolate coins, a meter stick and stand up learning.

**Tracy Defoe** is a workplace educational consultant and researcher based in Vancouver, B.C.

**Ruth Farrell** was a passionate workplace educator. This article about her work was written a few weeks before she died in a car crash on vacation in Mexico in April, 2003.

# Workplace Training for Small Businesses

ANN CURRY

In Saskatchewan, the big question is how to get essential workplace skills training to small workplaces, since they make up the majority of businesses here (74% of businesses have five or fewer workers while 94% have fewer than 50). A small workplace magnifies the time, personnel, and resource constraints of large companies, with the result that essential workplace skills training may not even be considered an option leading to business and personal success. The difficulty of providing training to small workplaces, however, does not mean that we shouldn't try. In 2001, with special funding from the National Literacy Secretariat, the Learning at Work project of the Saskatchewan Labour Force Development Board (SLFDB) established six pilot projects around the province, all with different partners, but with a community-driven plan of action. The purpose of these pilots was to understand how to promote essential workplace skills training to the small workplace and how the small workplace could best access this training.

## Six Diverse Projects

A brief description of each pilot will illustrate the diversity of approaches possible as well as the variety of training needs and partnerships used:

**Estevan** — Several partners (e.g., Saskatchewan Rural Resource Centre, the Agriculture Institute of Management in Saskatchewan, Chamber of Commerce, and Regional College) were involved in the planning, promotion, and delivery. The focus was on "soft skills" (e.g., Interpersonal skills/ communication) as a result of a survey about training needs done by the Chamber. The delivery was a series of six Lunch and Learn events with both local and more high-profile speakers brought into the community for the events. Local businesses had to commit to sending at least one person to each event; 22 businesses (44 participants) were involved.

**Swift Current** — The local partner was a private training company with the support/ advice of the Chamber of Commerce and the Entrepreneurial Centre. The focus of the training was assistance to individual workplaces on using the Guide to Essential Workplace Skills, a self-assessment tool for use in the workplace. The delivery was in the form of visits to the workplace by the trainer with one-on-one discussions with employers.

**Saskatoon** — The partner was a community-based literacy organization, READ Saskatoon, with facilities support provided by the Saskatoon Public Library and training support from volunteer tutors. The training focus was on writing for the workplace, and individuals signed up as a result of advertising in a variety of media. The delivery was a series of workshops provided by an instructor and volunteers, using individual, small group, and whole class instruction.

**Yorkton** — The partners were the Regional College and a local business. In addition, SkillPlan donated half the assessment booklets. The training focus was on preparing an Essential Skills Profile for one occupation, and providing appropriate training as a result of the assessment. The delivery was profiling at the business around the shifts of the workers, assessing at the college, and providing one-on-one tutor training to the workers.

**Nipawin** — The partners were the Regional College (four campuses) and four local Chambers of Commerce. The training focus was on "soft skills," particularly conflict resolution, as identified in surveys of Chamber members. Delivery was a workshop in each of the four communities given by a trainer hired by the College.

**La Ronge** — The partner was La Ronge Motor Hotel (owned by the Lac La Ronge Indian Band) with support from the Regional College and Saskatchewan Tourism Education Council. The training focus was to provide both a literacy learning centre for all hotel staff as well as specific literacy coaching in order to attain national certification for one department of the hotel, the housekeepers. Delivery was the provision of a learning centre on-site at the hotel open for three hours a day, five days a week, and staffed by a former employee who had taken tutor training; coaching was done by the same staff person at hours chosen by the housekeepers.

## Lessons Learned

Collectively, these six pilots provided a wealth of information from which we can draw lessons, but it is also necessary to remember that there are several groups for whom these lessons will be important: the clients or participants, the deliverers/trainers/instructors, the organizations involved, and the community at large. The lessons learned can be grouped under the headings of context, planning, delivery, and future sustainability.

By context we mean the environment that will support implementation of essential workplace skills training, and this comes from a focus on raising public awareness around workplace literacy issues. In addition, planners must be aware of the limited amount of time that the relatively few business/labour leaders have in small communities and work to conserve the time of these important partners. Finally, deliverers/trainers must thoroughly understand the mindset of the workplace.

Planners have to take into account several issues. First, the timing of the training is crucial (not at spring seeding!). Second, planners must consider how long the training should be (what can individuals and businesses afford). In addition, planners must be prepared for a lot of "leg-work" initially and throughout the delivery of the training. Those responsible for planning must also look at "soft skills" as being important training needs, as a mask for other essential skills gaps, and as a training entry into the workplace. Finally, the workplace itself should be considered as a delivery site to provide a meaningful context for the training.

At the delivery stage, consideration should be given to the impact of the training style and the importance of matched objectives between deliverer and participant. Furthermore, specialized trainers are a necessity so that time and money is not wasted. Finally, follow-up is crucial so that participants feel the training providers are accountable and so that the training providers can improve their offerings the next time.

For future sustainability, certainly core funding is required. The learning of the partners during the provision of training makes future offerings easier to implement, as will the creation of local champions through the success of pilots. Finally, the recognition that a learning culture takes time to develop helps those involved in workplace literacy training to stay in the game.

## Successful Models

In Saskatchewan, successful models of workplace literacy programs for small businesses need to be based on the following points:

- Partnership — in order to make essential workplace skills training cost effective, accessible, and applicable to the small workplace
- Community ownership — training based on community needs, using community resources, and promoting community successes will lead to sustainability
- General and specific training offerings — all training initiatives should have this option in order to meet participants' needs
- Workplace-based training — provides the best opportunity for specific training combined with a variety of delivery mechanisms
- Soft skills as entry point — promotion of this training may allow for later discussion/identification of other essential skills and training needs

Finally, it is capacity-building at the local/regional level that leads to sustainability. This capacity-building involves a lot of public awareness, pilots to demonstrate success, development of local champions, and ongoing activity.

Since 2001, the SLFDB has continued to forge and support community-led partnerships focusing on essential workplace skills training for employed workers. The demand has been overwhelming, leading all levels of government, local groups/agencies/institutions, and individuals to acknowledge that workplace literacy, or essential workplace skills training, must be on our agenda to ensure our place in the new global economy.

Please check the SLFDB website for full reports and description of tools: **www.slfdb.com**

**Ann Curry** is the former project manager for Learning at Work, a project of the Saskatchewan Labour Force Development Board.

# The Harvard Bridge to Learning and Literacy Program

JOHN ANTONELLIS

## Program Mission

The Harvard Bridge to Learning and Literacy Program (The Bridge Program) is a worker education program that provides training and development in basic literacy and computer skills, English for Speakers of Other Languages (ESOL) and General Educational Development diploma (GED) preparation to entry-level service workers at Harvard University during their workday. The objective of the program is to develop workers' skills to perform more efficiently and confidently in their present jobs and everyday lives, and also to give them the necessary skills to pursue other jobs. Ultimately, with these increased skills, workers will be in positions to explore more diverse academic and career choices and maximize their potential. Developing a more capable and competent workforce is also an integral goal of the Bridge Program.

The Bridge Program serves the University's service workers[1] — custodians, security guards, groundskeepers, and dining, transportation, parking and mail service employees. Some of these individuals lack basic reading, writing, and math skills; some never finished high school. Among the large number of foreign-born workers in these jobs, many have limited English language skills, and many also have low levels of literacy in their native languages. These limited capabilities often impede their ability to perform their jobs at high levels. Without further education, these workers will have few opportunities to improve their abilities and opportunities. Accessing educational opportunities, however, is particularly difficult for these workers because of time and logistical constraints: many hold down two or more jobs, support families, rely on public transportation, and lack the language skills necessary to learn about or participate in Boston-area training programs. The Bridge Program significantly enhances their access to training by providing workers with paid release time to take classes at campus locations easily accessible to them.

## Program History

The Office of Human Resources (OHR) began discussing the possibility of offering ESOL and literacy courses in 1998. That year the Office of the Vice President for Administration (VPA) wrote a proposal outlining the intent and logistics of implementation and secured university funding. Forty-four students participated in the 1999–2000 Bridge Pilot program. All were employees of the Harvard Faculty Club (a restaurant and inn).

Gradually the program began to expand, serving more and more university departments and eventually the contractors.

1. This includes both Harvard employees as well as employees of several union and non-union contractors that serve the university: ACME/Pioneer Janitorial, Restaurant Associates, Sodexho, UNICCO, White Glove and One Source.

The growth of the program also coincided with a campaign initiated by front line employees to bargain for an increase in pay that became known as "the Living Wage Initiative." A unique partnership between university undergraduates and the workers developed and the initiative received a great deal of media attention. The university showcased the Bridge Program in an effort to demonstrate its commitment to frontline employees, and eventually agreed to workers demands for a living wage. By the fall of 2002 the program was serving 442 workers. An additional 38 workers who could not attend classes were also working with tutors on their own time.

Students in this GED class studied math, science and writing with their instructor in preparation for summer testing.

The impact that these classes have made on learners has been profound and has impressed many high level University officials, including the office of the president. After just two semesters of literacy instruction, students in the faculty club who had previously been unable to read notes left by guests (e.g., requests for new towels, a need for a new light bulb) were bringing them to class proudly demonstrating their ability to read them. In the past, workers would bring these notes to their supervisor for translation.

## How the Program Works

All students interested in the Bridge Program are assessed by completing a short registration form to determine their basic reading, writing and speaking skills. Those with higher-level skills register for classes at the Harvard Division of Continuing Education's Extension School in their Institute for English Language Programs (IEL). Students who do not have the literacy level to succeed in the Extension School's IEL academic ESOL classes are placed or wait-listed for space in one of the Bridge Program's classes. Regardless of whether the learner attends classes at the Bridge or at IEL, they receive four semesters (two years) of paid release time to attend classes free of charge. Semesters are sixteen weeks long and students attend classes for four hours/ week.

One program goal is to increase the

literacy level of learners so that they will be able to make full use of their benefits and continue their education. After completion of their four semesters, students can continue their education through the University's tuition assistance program that offers courses at a greatly reduced cost, $40 per Course/Semester. Depending on the extent of their prior literacy and schooling and on the speed at which they progress, four semesters is sufficient for some students. A sizeable number, however, need class time beyond the amount they are given as paid release time. A limited number of participating departments have elected to allow their employees to take six semesters of paid release time; most departments find this difficult and are encouraging their employees to study on their own time whenever possible. The Bridge Program helps with this by providing computer classes and individual tutoring.

The Bridge Program offers a range of courses. Four levels of ESL instruction prepare learners for the faster paced academic ESL courses offered at the Extension School's IEL program. Two classes, Literacy I and Literacy II, while addressing listening and speaking, focus on the development of reading and writing skills. While a student in a Literacy I class may begin with letter recognition and basic decoding skills, a student in a Literacy II class will be reading short simple text and writing simple sentences or short paragraphs. A class called Bridge ESL is a transitional course where grammar structure is formally introduced, beginning with parts of speech and verb tenses. Students who have successfully completed this class are ready to attend the IEL classes. A class called Speaking and Listening is offered for students who have advanced reading and writing skills but want to improve their oral/aural skills. For some students, this class is an alternative to the IEL classes, for others it is another step along the way.

In addition to the ESL classes, the Bridge Program offers General Education Development (GED) and pre-GED classes for native and non-native English speakers who are either working towards attainment of their GED or interested in honing their academic study skills. Introductory and Next Step Computer classes are also offered; however, they must be taken on the employee's own time.

The Program offers tutorial assistance for students in the classes who need extra help, students waiting for placement in a class, and for students who have completed their four semesters and want to continue their education. A resource center in the Bridge Program office contains computers for student use, career information, higher education information, and skill and interest inventories. Staff members are available to help workers explore job possibilities, career options, Harvard policies and benefits, and additional educational opportunities, and to assist with such life-survival issues as bill paying and establishing credit.

## The Bridge Program in Contrast with Massachusetts-Based State-Wide Initiatives

Workplace Education in the state of Massachusetts has undergone a number of changes over the last few years. In the midst of a politically unfriendly situation (e.g., Massachusetts voters overwhelmingly voted to terminate bilingual education programs for K-12 learners), there are a few encouraging programs. Some of the innovative state-wide programs described below target industries and sectors as well as individual companies, teach foundation skills along with job skills and focus on

establishing career paths for individuals. In contrast, the Bridge Program is a worker education program that places its primary emphasis on meeting the educational needs of the students so that they will have greater educational opportunities and greater job mobility. Improvements in job performance occur as well, but the program curriculum is not customized to their jobs.

**The Workforce Training Fund** (WTF) is a state fund financed entirely by Massachusetts employers, through a surcharge attached to their unemployment contributions. Enacted into law in July 1998, its purpose is to provide resources to Massachusetts businesses and workers to train current and newly hired employees. The WTF funds a broad variety of training initiatives including foundation skill development (ESOL/ABE). For more information go to **www.detma.org.**

**The Extended Care Career Ladder Initiative** (ECCLI) is a publicly funded program that seeks to create career pathways at long term health care facilities beginning with food service workers and housekeeping staff and extending through nursing staff. Foundation skills are taught alongside job skills. For more information go to **www.commcorp.org/wss/ECCLI/default.htm.**

**The Building Essential Skills Through Training Initiative** (BEST) pools the resources of several Massachusetts agencies, including the Division of Employment and Training, Department of Labour and Workforce Development, and the Department of Education, to fund projects that will close the gap between the skills employers need and the skills that incumbent workers have. For more information go to **www.commcorp.org/bes/WLS/best/default.htm.**

**John Antonellis** teaches English as a Second Language at the Bridge to Learning and Literacy Program at Harvard University.

# ISO 9000: An Essential Skills Curriculum

RENETTE MUISE

In 1998, the Nova Scotia Department of Education received a grant from the National Literacy Secretariat to develop an ISO 9000 Essential Skills Curriculum. The creation of this curriculum was in response to the evolution of the global marketplace which required companies to become ISO 9000 registered in order to remain competitive. A company's compliance with ISO 9000 standards ensures that it has a consistent Quality Assurance system, and that's good business. Since ISO 9000 is a documented quality system using procedures outlined by the International Standards Organization, it is imperative that employees understand the importance of obtaining ISO 9000 registration for their company, and how this will affect their jobs and how they perform them.

## Essential Skills for ISO 9000

ISO 9000 registration requires enhanced literacy skills to manage the increased need for documentation. This means that workers will need the essential skills that ISO 9000 requires:

- reading (understanding and interpreting job descriptions)
- writing (creating and editing job descriptions and other documentation)
- teamwork (working effectively in a team-oriented environment)
- problem-solving (working towards continuous improvement)
- math (using statistical process control)
- verbal (clearly stating and explaining job tasks to auditors)
- document literacy (completing and understanding flow charts and graphs)
- critical thinking (clarifying, summarizing, specifying and generalizing)

The ISO 9000 Essential Skills Curriculum was created to enhance the essential skills of employees. While demystifying the language of ISO 9000, the curriculum takes employees through the various stages of the registration process and describes the standards that the company must meet to ensure quality. Through a series of independent and interactive exercises, employees enhance key essential skills and gain an understanding of the importance of ISO 9000 registration to their company and to themselves. The curriculum is divided into four units encompassing over 300 pages of detailed lesson plans.

**Unit 1,** ***Introduction to ISO 9000,*** is divided into two sections.

- Section 1, *The Need for Quality Assurance in Today's Society*, addresses the importance of quality at the workplace, defines quality assurance and why it is needed, and how employees can manage

the changes that ISO 9000 brings to the workplace. Workplace Education Programs can be instrumental in helping employees accept and support changes in the workplace.

- Section 2, *The International Standards Organization*, provides a history of ISO 9000 and describes what the ISO 9000 standards are. Additionally, this section outlines a parallel quality assurance system developed and used by the food processing industry, known as HACCP (Hazard Analysis Critical Control Points).

**Unit 2, *ISO 9000 Implementation,*** is also divided into two sections.

- Section 1, *The Language of ISO 9000*, introduces employees to the key terms of ISO 9000 as well as commonly-used acronyms of the standards system.
- Section 2, *Preparing for ISO 9000 Registration*, helps employees to understand why the organization has embarked on the time-consuming and rather expensive journey toward registration. The section outlines the steps required for a company to become registered, as well as the importance of timely and accurate documentation. The section concludes with the importance of the company's Quality Manual, and the auditing/registration process.

**Unit 3, *Your Job and ISO 9000,*** is comprised of four sections.

- Section 1, *Writing Job Descriptions*, is the hands-on writing skills component of the curriculum. In this section employees identify and document their job descriptions and specific tasks they perform. While developing writing skills, employees learn that clear and accurate job descriptions are critical to a successful audit. The audit is a review by an outside agency to ensure that employees are "doing what they are saying" and "saying what they are doing."
- Section 2, *Processes and Procedures of ISO 9000*, addresses the importance of Process Control and Quality to all stakeholders: employer, employee and consumer.
- Section 3, *Flow Charting*, provides employees the opportunity to "write" in a different form. Employees are introduced to the specific symbols and terminology of flow charts as they relate to ISO 9000 and how flow charts are used to document work procedures.
- Section 4, *Problem-Solving to Improve Work Processes* encourages employees to develop work-related problem-solving skills and techniques, and to apply them to specific work situations. Employees work through fictitious case studies as well as work-specific scenarios that they suggest.

The final unit of the ISO 9000 Essential Skills Curriculum, **Unit 4, *Total Quality Management: Making it Work for You,*** re-emphasizes to employees their key role in ensuring that customers purchase and receive the quality product(s) that they expect. This unit emphasizes the importance of the company's Mission Statement in the quality process, and the integral role that employees play in supporting the Mission Statement. The unit also emphasizes that registration as an ISO 9000 company is only the beginning of a continuous quality process.

Those employees who actively participate in the process of ISO 9000 understand why it is needed and what it means to consumers. They truly gain an understanding that continuous quality improvement requires continuous learning. This concept will create quality assurances all around — a quality workforce through the acquisition of essential skills, quality service, and a quality product that will have appeal in the global marketplace.

**Post Script:** The Essential Skills Curriculum for ISO 9000 and its accompanying promotional brochure are currently being revised to reflect the recent changes of the ISO 9000 standard to the new ISO 9000: 2000 standard.

**Renette Muise** works as a Skills Development Coordinator with the Nova Scotia Department of Education, Skills and Learning Branch.

# Practical WHMIS … an e-learning Tool

JUDITH BOND AND MARNI JOHNSON

Workplace Training and Services Inc. (WTS) has worked in a variety of sectors (aerospace, hospitality, food, manufacturing, and information technology) in the Greater Toronto Area and Southern Ontario. Our niche is working with employees who have communication issues because of literacy or second language interference.

One of the critical areas that management, union and employees identify as a training need (because of language) is health and safety; in particular, WHMIS or Workplace Hazardous Material Information System.

Much of the current health and safety training is done in-house by supervisors or training staff. These individuals generally have little or no experience adapting training for employees with literacy or second language issues. We have found that the training often doesn't "take."

*Nine support employees in a medical centre who regularly handle and dispose of needles did not recognize the biohazardous WHMIS symbol.*

*A worker ate his lunch at his work station. Clearly marked pipes (WHMIS corrosive symbol) ran over his head. Chemicals used to produce the bricks of foam sat at his feet.*

*A worker washed toxic chemical dyes from screens. He was not wearing the gloves, apron, mask and rubber boots needed for protection.*

## WHMIS Online

In 2000, OWLware, a Toronto based software developer and web host, approached WTS. They were looking for a partner who could identify a potential training opportunity and who could also be the subject matter expert.

When we thought about training opportunities, we recommended WHMIS because of our concerns. Often, our learners find in-house training challenging and they may not always realize the critical impact that their lack of understanding could have on the quality of their lives.

WHMIS is a federally legislated program developed to protect Canadian workers. There are compliance issues for companies, including employee training as well as clearly written statements about "the right to refuse unsafe work" for workers.

Developing **www.practicalwhmis.com** took the better part of two years with both

partners working part-time on the project. Although we had lots of experience writing for workplace learners (*PaperWork Plus* series, *CanadaWorks*, *Through the Looking Glass*) we were new to e-learning except as learners. We used our experience, our knowledge of content, language and common sense to develop the content at www.practicalwhmis.com.

## Starting Out — Asking Questions

The first step was to ask such questions as:

- ► What information was critical?
- ► What supports do we include?
- ► How do we keep it accessible?
- ► How do we help learners new to the computer environment?
- ► What, if any, assumptions can we make?
- ► What competency levels do we target for language?
- ► How do we field test?
- ► How do we evaluate and measure learning?
- ► How do we accommodate different learning styles?
- ► What will be the limitations of the medium?
- ► How can we keep it interesting?

OWLware had a whole different set of questions. Fortunately, their experience complemented and enhanced what we planned to do!

## Three Key Areas

WHMIS content is static. There are symbols, labels, MSDS, rights and responsibilities, protective equipment, etc. Our plan had to include all of this information. But in asking all our questions we identified three key areas that would drive anything that we did:

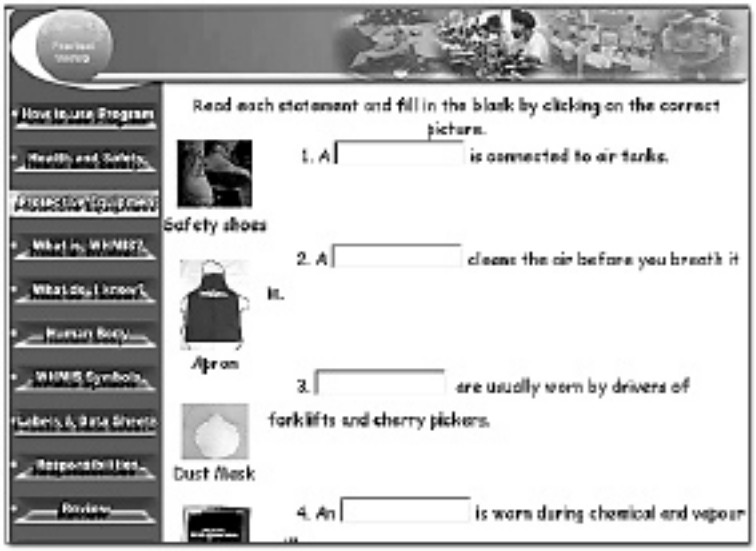
1. Many front-line workers have little or no computer experience. They may use computerized equipment such as scanners and Statistical Process Control (SPC) systems but do not use a computer as a tool for living and learning.
2. The vocabulary of WHMIS is sophisticated, dense and specialized. It includes chemical and medical language.
3. WHMIS is a 100% type of learning. Handling hazardous material with a 60–70% understanding is a potential life and death issue.

*One assumption we had to make…a co-worker, supervisor, volunteer or instructor would turn the computer on and help with the log in.*

## Working Through the Units

In order to address the potential computer barrier, we asked Mary Hall (co-author of *Processing Words: Computer Supported Language Lessons for ESL and Literacy Students*) to develop the first unit as an introduction to using the computer to navigate the course. She limited the information to those skills that would actually be needed: using the mouse and keyboard, relevant keys, scrolling, etc. If a learner is comfortable with the computer environment, they can skip this unit.

In order to give learners the opportunity to practice vocabulary needed for the WHMIS content, we started with general information about health and safety and protective equipment. There is an extensive glossary included. When a learner sees a


word in blue, they can click and get to the glossary for more information, perhaps a picture. OWLware worked with us to develop pictures, sound and action to explain concepts.

Each content unit ends with a quiz. The learner needs to get 100% in order to move to the next unit. They can take the test until they get it right. The questions will be a random selection and slightly different each time.

After a lot of practice with vocabulary and using the computer, the learner takes a pre-test "What do I already know about WHMIS?" The final unit is a review and the learner takes the same test. Again, the learner can take the test until they get it right.

We chose WHMIS as the context for our first venture into e-learning because we believe that access to information is critical to an individual's success. We also feel that the content can stand alone if necessary. A learner can work at his or her own pace for as long as required (up to a year). We also know the content. At WTS, we have successfully completed WHMIS training with the IAPA (Industrial Accident Prevention Association). WHMIS remains a part of every workplace curriculum we develop…it's that important!

AlphaPlus has agreed to market and promote this e-learning tool. If you are interested in purchasing access to **www.practicalwhmis.com** or viewing a demonstration, please contact:

**Monika Jankowska**
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Centre AlphaPlus Centre
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**Marni Johnson** and **Judith Bond** are the directors of Workplace Training and Services Inc. (WTS), Toronto and have been operating for over 13 years.

# Frontline HACCP:

## Training Materials for Production Workers

"Hazard Analysis Critical Control Point (HACCP) is a food safety program that focuses on the identification, evaluation, control and prevention of hazards at all stages of the food production process….*Frontline HACCP* is an introduction to HACCP and related content for employees in the food processing industry, especially for those on the shop floor or 'frontline' of production. It is a collection of highly visual, limited-text, plain language materials addressing the basics of an HACCP system and the prerequisite programs or good manufacturing practices that support it. The goal of *Frontline HACCP* is compliance — that workers will acquire the knowledge, skills and attitudes they need to follow proper procedures."[1]

The Alberta Food Processors Association (AFPA) was one of three partners involved in the development of *Frontline HACCP*. The materials are for trainers in the food processing industry who are working with the HACCP program and practices. The materials are generic and trainers can customize or supplement them with their own workplace specific examples.

Janet Henderson, Vice President, Training and Development, of AFPA says, "HACCP has specific food safety goals that must be met for different sectors of the food processing industry. Our mission within the AFPA is to build capacity within food processors of Alberta and, by association, with workers so they can maximize their potential in the community and in the workplace."

1. The Alberta Food Processors Association. *Frontline HACCP: Training Materials for Production Workers.* 1999. Contact Janet Henderson, Vice President, Training and Development, Alberta Food Processors Association: 403-201-1044.

# Innovation at Boeing: Math and Reading Modules for Deaf Employees

SUE TURNER

## Background

Boeing Canada is a leader in workplace education. Not only does Boeing offer its employees English and Mathematics Essential Skills courses that use only workplace documents, but it also specifically tailors these courses to address language and cultural diversity. This results in a population that is able to participate in the intricacies of aerospace manufacturing and meet the standards set by national and international regulatory agencies such as the Department of Transport.

Boeing Canada Technology, Winnipeg Division, specializes in the manufacturing of composite parts, which it markets in competition with other Boeing operations worldwide. As a competitor in this market, the workforce's skill level and its ability to operate efficiently is a critical issue. Boeing Winnipeg has made a commitment to its 930 employees to ensure that each one is given the opportunity to avail him/herself of Essential Skills courses in Mathematics, Oral Communications, Reading and Writing. Since 1995, Boeing Winnipeg has delivered an estimated 23,000 hours of workplace essential skills and communications training to over 1,000 employees. Boeing has spent approximately $1,000,000 for employee-related essential skills training.

## Originality and Innovation

In 2000, two curricula, Essential Skills Reading and Essential Skills Mathematics, were developed. Perhaps the most inspired component of the Essential Skills training is the module designed for the Deaf employee population. Boeing Winnipeg has twenty-four Deaf employees, the largest number of Deaf employees in the private sector in Canada. In order for the training to be effective, it is necessary to understand the fundamental learning style and the language of the Deaf and to develop a strategy for delivering concepts in that style and language.

The Deaf in North America use American Sign Language (ASL) as their first language. ASL is very unlike Standard English in terms of structure, grammar and, especially, its mode. In addition, the Deaf enjoy a world of meaning which is different in custom than that in which hearing Canadians participate. The result is the Deaf straddle two languages and two cultures — in essence, two worlds.

American Sign Language is an entirely visual language. This fact is the inspiration behind creating the set of videos for the Math curriculum, the first to be translated into ASL. Each segment is introduced and closed by a skilled Deaf actor, weaving a thread of colour, humour and Deaf culture throughout the videos. The set of three videos are

clearly labelled and the corresponding work pages are found in the Math for Deaf Learners curriculum. The videos are entirely in American Sign Language — there is no voice-over or closed captioning. This is "Deaf for Deaf" learning.

## A Model for Developing Workplace Learning Materials for the Deaf

The Mathematics videos in ASL, which are now being used by the Deaf at Boeing as well as other Deaf groups within Winnipeg and across the country, have the potential of being an important learning tool in Deaf education. This type of teaching has never been done before in the workplace, and the impact of these videos on the Deaf community has been very positive.

This project had the full approval and support of the Deaf community in Winnipeg. The videos were developed using a steering committee of members of the Deaf community in Winnipeg, a number of Deaf Boeing employees, their instructor, and the Mathematics curriculum writer. Two of the Deaf employees from the Winnipeg facility participated as actors in the videos. Other actors are members of the Deaf community, showing community role models in a successful learning situation. This connects the Deaf students to their language peers and gives them the ease of learning that we take for granted in the hearing world.

## Results and Achievements

Due to Boeing Canada Technology's mandated certification requirements, many of the workers must be re-certified annually. This requires employees to engage in refresher studies, a written examination and on-the-job skills verification. The skilled technical performance that is a Boeing requirement demands reading skills and a fundamental foundation of Mathematical skills for daily referencing of specifications.

The result that speaks the loudest is that a very high percentage of employees, both Deaf and hearing who have taken the Essential Skills Reading Course, are now able to pass the annual regulatory certification exams. Many of these employees had previously struggled with these certifications. Likewise, a very high percentage of employees who have taken the Essential Skills Mathematics Course are now able to challenge the Boeing Mathematics test successfully.

One of the most visible achievements of this learning is that Deaf and ESL employees now hold positions as Lead Hands and in higher management. The far-reaching effect on self-esteem and life skills is immeasurable.

## Positive Change

The success of the Math for Deaf Learners videos fuelled interest in transferring the Navigation component of the Essential Skills Reading Curriculum into an ASL video as well. That video was completed in the spring of 2002. These two curricula allow the Deaf workers to have access to all Boeing learning materials in their own language. This puts the Deaf employees on a level playing field with their hearing counterparts.

The outreach potential generated by the Mathematics for Deaf Learners component of the curriculum is enormous. Boeing has made the videos and the Mathematics curriculum available to other Deaf groups within the city and across the country. These include Deaf Centre Manitoba, Manitoba School for the Deaf, Society for Manitobans with Disabilities, Palliser Furniture, and the Nova Scotia Community College Deaf Studies Centre.

## Benefits to the Business and to the Employees

The co-operation and community effort of Boeing employees, both Deaf and hearing, the larger Deaf community of Winnipeg, management and CAW Local 2169 in the development of these curricula have given each of these groups a deeper respect for one another. All have reported that this training has provided many benefits and options for employees both at work and in their daily lives. This Essential Skills training provides the foundation for further training and career advancement opportunities as well as the satisfaction that comes with successful completion of certification requirements.

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