

LAUBACH LITERACY OF CANADA

# COMPLETE STRATEGIC PLAN

## 2003-2013

FINAL VERSION  
FROM RONALD BISSON TO  
BLUEPRINT COMMITTEE

APPROVED AT 2003 AND 2004  
ANNUAL GENERAL MEETINGS

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## 1. Context Setting

Why are we doing this?

We have been working hard teaching literacy for the last 30 years. We have been so busy that we have never really stopped to review and improve what we do on a regular basis.

We get money from the federal government to do our work. These funds come from the *National Literacy Secretariat*. Last year, it told us to look at everything we do. We call this an organizational evaluation.

To do this work, we hired a neutral company. We asked it to tell us what needed fixing. This company talked to many Laubach people: students, tutors, trainers, staff, Board members, provincial bodies and so on.

We said we do a lot of good things. Students really appreciate what Laubach delivers. Our materials are well received.

We also said that many things are not good. We said that there is too much unhappiness in Laubach. Our ways of working with each other are not that great. It takes too long to make decisions. We struggle among ourselves too much. Too many people are hurting.

We said to this company that repairing little bits and pieces will not do. Everything needs fixing.

The company therefore recommended that Laubach remake itself from top to bottom.

We are giving ourselves a new vision, a new way of making decisions, a new way of making literacy available to those who need it.

This is not just a spring-cleaning. We decided we needed to completely renovate our house.

We call this a strategic plan.

### 1.1 Why Are We Doing This?

LLC Laubach Literacy of Canada is a community-based volunteer literacy organization that follows in the tradition of the world-recognized literacy pioneer, Frank C. Laubach.

The first Laubach tutor-training workshop in Canada was held in Lunenburg County, Nova Scotia in 1970. Laubach Literacy of Canada was incorporated as a non-profit, charitable organization in 1981.

Over the years LLC has grown into a national organization, having trained thousands of tutors and reached many thousands of students wanting to improve their literacy skills.

At one time, LLC was one of the few adult literacy organizations in Canada. Its practices and approaches were recognized as exemplary examples of literacy work.

In the intervening years, many other private and community-based organizations started offering literacy services to adults. Government funding for literacy has increased dramatically as Canada entered the information age.

At the request of the *National Literacy Secretariat*, our national funder, LLC undertook a formal organizational review in September 2001, which was completed in July 2002. The findings were published in a report dated July 12, 2002, entitled *An Organization Evaluation of Laubach Literacy of Canada*. This neutral third-party evaluation was carried out by Diane Abbey-Livingston and Associates of Toronto.

It must be noted that the evaluation simply synthesized what LLC people said in interviews and questionnaires.

The evaluation revealed that LLC has many strengths to build on such as: its volunteers, its materials, the bookstore, and its relationship with students.

The evaluation revealed that LLC also has many weaknesses that must be addressed if it is to continue serving adults in need of literacy services in the future. The weaknesses far outweighed the strengths. The evaluation pointed to a high level of unhappiness in the organization and recommended that LLC give itself a new road map for the future. The membership confirmed the need for major corrections and change.

The Board of Directors agreed with the evaluation results and undertook a strategic planning process to address the issues raised in the evaluation.

On September 5 and 6, 2002 the Committee that led the evaluation process met to plan the strategic planning process. Ronald Bisson and Associates was retained to accompany the organization in this work. The Committee saw the need to undertake an in-depth rethinking of LLC's mission, vision, practices, structure and delivery approaches.

A major first step in the planning process occurred in October 2002, when approximately 75 LLC members (Board, staff, students, volunteers) met for three days in Ottawa to review the evaluation results and to initiate a reflection on issues that needed to be addressed. All the material produced in this workshop is captured in a document entitled *Laubach Literacy of Canada, Strategic Planning Workshop, October 25, 26, 27, 2002, Ottawa, Technical Report*.

The Strategic Planning Committee met again in Ottawa on February 7, 2003 to continue the process. It became clear at this meeting that the weaknesses identified in the

evaluation such as the difficulties in taking action on issues and the communication gaps at all levels were hindering the planning process itself.

The main government funder (National Literacy Secretariat) informed LLC that it would commit to only 33% of LLC's funding for fiscal year 2003-2004 in anticipation of the strategic planning results.

The Board and the Committee held a special meeting in Toronto on March 14, 15 and 16, 2003 to resolve these issues and re-energize the strategic planning process.

The Strategic Planning Committee, nicknamed the Blueprint Committee, met in Bedford, Québec for one full week from April 28 to May 2, 2003 to come up with a strategic planning proposal that would address the critical issues identified in the evaluation.

This Committee developed the strategic plan in two parts. Part One dealt with all the governance issues that had been identified in the evaluation. This document was approved through motions adopted at the June 7, 2003 Annual General Meeting, held in Saint John, New Brunswick.

The Blueprint Committee met for three days on September 10, 11 and 12, 2003 in Ottawa to continue the planning process. This part of the strategic plan dealt with more operational issues.

The Blueprint Committee carried out a consultation process with key stakeholders, including provincial organizations between the end of September and mid-December 2003. This consultation touched on the following elements.

- Training and Certification
- Communications and Public Relations
- Human Resource Development
- Board Committees
- Financial Resources

All Provincial Presidents received a letter of invitation from Board President Bessie Merrigan inviting them to organize provincial forums where a Blueprint Committee representative could meet members. In some instances the consultation with members occurred at provincial Annual General Meetings. Responses from over two hundred stakeholders were collected and analyzed in depth by the Blueprint Committee.

Three questions were asked in this consultation :

1. What ideas do you like? Why?
2. What do you not like? Why?
3. What suggestions do you have for the Blueprint Committee?

The Blueprint Committee met again January 15 and 16, 2004 to study the feedback from the Fall consultation and to finish writing the Strategic Plan. Those sections of the Plan will be voted on at the June 2004 Annual General Meeting.

The Strategic Plan addresses all the issues raised in the Organizational Evaluation and takes into account all consultation results.

Bylaw changes required by the adoption of the Plan were approved at the 2004 Annual General Meeting held in Ottawa on June 4 and 5 at the Carleton University Campus.

## 1.2 What is a strategic plan?

A strategic plan is developed at many levels.

The highest level tells me the general direction where I am going. We call this a strategy. For example, if I want to travel from Barrie, Ontario to Gander, Newfoundland, my strategy will be to travel north-east.

Once I get to Gander, things will change in my life. We call this change results. For example, if I go to Gander to be closer to a person I love, the result will be a better family life. If I go to Gander because a friend has found me a job, the result will be an increase in my pay. Sometimes I want to get two or three results at the same time.

The next level says what is my purpose on this trip. We call this an objective.

The last level tells me in detail how I will get there and how much it will cost me. We call these actions.

The actions I pick will depend on my purpose.

For example, if my purpose is to be in great physical shape when I get to Gander, my action will be to walk all the way. This action might take a long time. I might not have that time.

My purpose might be to get there quickly. My action then will be to take the plane. This action might take a lot of money. I might not have the money.

My purpose might be to meet a lot of people. My action then will be to take the bus. This action might be the right one for me. It will allow me to reach my purpose of meeting people. It will also be cheaper than flying and quicker than walking.

My strategy, travelling north-east remains the same all the time. My result when I get to Gander remains the same also but my purpose and my actions might be different during my trip.

In this document we are dealing only with strategies and results. We call this a strategic plan. It tells us **why** we do things.

Our exact purpose and our actions will be developed each year. We call this an Action plan. It tells us **how** we do things.

The action plan will be in tune with what is happening around us each year, but the general direction and results will remain the same.

This document is based on a ten-year planning horizon, from 2003 to 2013.

Based on the recommendations of the organizational evaluation and on its knowledge of the field, the Blueprint Committee reviewed the following questions and proposes answers that could form the basis of a renewed LLC.

- what is going on around us? (the foreseeable external environment)
- who will we reach? (the clientele)
- what will we do? (actions)
- what will we produce? (products and services)
- what will change after our actions? (the direct, intermediate and final results)
- how will we measure our progress? (outcome indicators)
- how will we make decisions? (the governing structure)
- how will we manage our organization (the management and staff structure)

A strategic plan does not enter into the “how tos”. This level of operational planning occurs in the yearly Action plan. A strategic plan is in a sense a “live” document that is responsive to events. Progress on results is reviewed at every annual general meeting for accountability purposes to members and to funders. Realignment occurs as needed.

## 2. The External Environment

What is going on around us? What is new? What will literacy look like in ten years?

Before renovating our house, we need to know what type of climate we live in. We don't build a house in Florida the same way we build one in Sudbury.

The same applies to organizations like Laubach. We are not alone. We get a large part of our funds from governments and from the sales of our materials. We need to try to see where things are going.

In 2003, we asked a company to give us a forecast as to what will be happening in literacy in Canada over the next five to ten years. The person who did this job is from Alberta. He has been working in literacy for many years. He said things that are an important part of the climate we need to think about as we renovate our house.

- Literacy will become more important for the federal government. We foresee that many Departments will be involved and not just the National Literacy Secretariat. There will be more linking of literacy to job skills.
- Money will be given for specific purposes and to reach specific groups rather than given for literacy in general.
- Volunteers will continue to be very important in literacy, especially to support adults with lower skill levels. We will need to work differently with volunteers. There is too much burnout.
- Many organizations will publish and sell or give literacy materials. Laubach must make sure that its materials remain very good.
- Organizations that receive government funds will have to report in a clear way how those funds are doing what has been promised.

In preparation for the October 2002 workshop, LLC requested an external environment analysis from Yvon Laberge, a literacy expert from Alberta. The following are the main ideas of his document entitled *Laubach Literacy of Canada, Environmental Scan, Background document for Strategic Planning Exercise*, October 15, 2002.

### Policy directions

There are two policy discussions happening at the federal level at the moment that are getting a lot of attention: 1) the Skills Learning Agenda and, 2) the Innovation Strategy. In the Innovation Strategy, the federal government argues that as the world economy

changes to a “knowledge-based economy”, old jobs are being lost and new jobs requiring new skills are emerging. Human Resources and Development Canada (HRDC) estimates that by 2004, 70% of new jobs will require post-secondary education. Other G8 countries are facing similar situations and have come to similar conclusions.

The arguments supporting the Skills Learning Agenda relate to skills development in individuals to help them better integrate into the changing economy.

This scenario potentially pits two opposing approaches to literacy against each other relative to the purpose of adult literacy. One approach states that literacy development should facilitate integration into the economy. The other puts forward the notion that literacy is a basic human and citizenship right to which everyone is entitled, regardless of their motivation to learn. Some call this the economic versus social agendas.

Following the 2001 and 2002 Speeches from the Throne, it is likely that increased federal funding will be distributed primarily through federal-provincial/territorial mechanisms. One could expect that the National Children’s Agenda would serve as a model. In this case, the federal government set a broad framework, provinces and territories established their respective initiatives and the federal government transferred money to the provinces and territories for them to implement these initiatives. At the same time, there were numerous sectoral initiatives stemming from different federal and provincial/territorial ministries that strive to meet the overall Children’s Agenda goals.

It will take time to fully develop and implement appropriate funding mechanisms. It is unlikely that the Skills Learning Agenda will be fully implemented over the next five years

There is an increasing realization that literacy cannot be easily pigeonholed into one single Department’s mandate. At the federal level, we remember that the National Literacy Secretariat started in the Secretary of State. When the Secretary of State was broken up and pieces moved to other Departments, the NLS landed in Human Resources and Development Canada. However, we are now realizing that Health and Indian and Northern Affairs must get involved in literacy. When will we involve Agriculture and Fisheries, and Justice? It is reasonable to expect that experiments in adult literacy as a cross-Departmental initiative in the federal government will build on the success of the Children’s Agenda.

### **Funding directions**

It is anticipated that over the next five years, funding priorities will be placed on:

- Improving literacy skills in youth to ensure they can integrate into the new knowledge economy.
- Improving educational attainments in Aboriginal Youth.

- Increasing access of immigrant youth to training that will lead to meaningful employment.
- Strengthening early childhood literacy development programs, especially in the Aboriginal population.

There might be increasing opportunities to access funding from different federal and provincial ministries as they begin to get involved in literacy activities. This funding would likely be available to serve very specific target populations and would relate directly to the mandate of the ministry involved (e.g. Health and Fetal Alcohol Syndrome).

The social agenda will not be completely ignored. Investment will be directed to groups with disabilities such as the blind and the deaf. The largest group that will garner significant attention are children, youth and adults with fetal alcohol syndrome.

It is quite likely that funding will continue to be on a project basis, with little chance of multi-year funding. Also, we can expect that organizations will have to continue to imbed operational expenses into the project budgets.

### **Volunteerism**

The four principle challenges faced by organizations are:

- volunteer recruitment and retention,
- volunteer training,
- volunteer burn-out, and
- volunteer tutor accountability.

Volunteers in adult literacy programs face many challenges, a number of which are not unique to literacy groups. Burnout seems to be the major challenge faced by the individual. This is often due to the lack of an adequate volunteer base to carry on the activities of the organization. The volunteer often wears many hats – board member, tutor, trainer, fundraiser, etc. This common problem in adult literacy organizations will not change quickly or easily.

The trend of using volunteers to offer literacy services will likely continue. There will be a push towards “professionalizing” the adult literacy field, which usually means a push away from volunteerism. This trend will emerge more strongly in organizations that offer literacy following the economic rationale. That being said, volunteers remain the most cost-effective means of offering literacy services. This approach will continue, particularly in organizations that offer literacy services based on a social philosophy. Volunteers will increasingly deal with target groups that are at the lower skill levels and less likely to be able to easily and quickly move into post-secondary education.

There is no indication that the volunteer challenges currently faced by literacy groups will change over the coming years. It will be the responsibility of each organization to identify and implement the appropriate strategies to respond to these challenges.

### **Resource development**

There has been a proliferation of resources and materials in adult literacy in the past decade. This is understandable because resource development was one of the major NLS funding streams and because there was a lack of materials and resources in this emerging field. Organizations such as Laubach were at the forefront of this development.

Over the course of the decade there has been significant effort and investment in the distribution of these materials. Some of the strategies include:

- NLS requires each funding recipient to provide copies of the resources it has developed so they can be shared across the country. As a result, provincial and territorial coalitions have been collecting resources and implementing distribution strategies.
- The National Adult Literacy Database (NALD) has emerged as a key player in the dissemination of information, resources and materials on-line. NALD is constantly adding full-text documents that can be downloaded easily by practitioners. Practitioners can easily do searches for materials to meet the specific needs of their learners.
- *Grass Roots Press* is emerging as a major clearinghouse of literacy materials and resources in Canada (see <http://www.literacyservices.com/>).

Increasingly, practitioners are borrowing materials and resources from a number of different programs to better meet the needs of the learner. We expect that this trend will gain in popularity over the next five years - as the technology develops, as practitioners become more familiar with it and as the availability of on-line materials increases.

In this context, competition for the sales of materials and resources is becoming stiff!

Also, materials and resources that offer a great deal of flexibility and adaptability to a number of different situations will be in demand.

There will be increased demand for culturally sensitive materials to serve the needs of the Aboriginal, Métis and Inuit populations. Materials and resources that meet the needs of these populations must be developed in close collaboration with each group. Further, we expect increased interest and need for materials and resources that will serve adults with fetal alcohol syndrome.

### **Accountability and reporting**

There will be increased emphasis placed on accountability by funders. Accountability measures will tend to be outcomes based and more credibility will be given to quantifiable data rather than anecdotal information.

Funding recipients will be expected to align their own project goals, objectives and outcomes with those of the funder as described in their accountability framework. This has two concrete implications for funding recipients:

- Those who are able to articulate program outcomes that match those of the funder are more likely to receive funding;
- Those who receive funding and who are best at collecting the required information and reporting on this information will be favoured for continued funding.

Many existing adult literacy programs will resist this approach for two principal reasons:

- In the past, many funders have accepted anecdotal narratives.
- Many literacy organizations do not have the skills to measure literacy gains and to report on these gains.

Organizations that can best demonstrate linkages between their project activities and outcomes to those of the funder will have a better chance of receiving funding.

### **Emerging high needs groups**

Over the course of the next five years we can expect that funders will place a priority on serving the following high needs groups:

- Aboriginal, Métis and Inuit
- Population afflicted with fetal alcohol syndrome (FAS)
- People with disabilities (especially deaf and hard of hearing and the blind)
- Youth
- Parents of children who are in at-risk environments

### **3. LLC Clientele**

Who do we want to reach?

Laubach will continue working directly with those persons that need increased literacy. There are millions in Canada. Laubach cannot reach them all.

So Laubach will also partner with many groups that work with all types of people whether in health programs, social activities, after school programs or special needs programs. The idea is to add literacy to what these groups do best.

In light of this environment, LLC will reach two types of clientele. One is composed of individuals who need literacy services. These number in the millions. It is obvious that LLC's resources do not support reaching all such individuals in Canada. Therefore, LLC must also develop partnerships with other organizations that reach large numbers of individuals. LLC's role is to develop ways these organizations can insert literacy awareness and training into their ongoing work with their client groups.

With this approach in mind, LLC will focus on reaching the following client groups over the next ten years.

- Persons needing literacy skills related to employability. This category would include people needing enhanced literacy skills for employment improvement, employment maintenance or employment readiness. These persons can include under-employed or unemployed adults, employed adults or youth at risk.
- Persons seeking increased independence through literacy. This category can be adults seeking to raise literacy skills to increase their choices related to education or adults that do not have easy accessibility to literacy training because of geographical, physical or financial situations.
- Occasional clientele. This can vary from region to region. Occasional clientele can include adults in correctional institutions, in the Armed Forces, adults in training institutions who need extra literacy training to complement their program, and so on. Occasional clientele could even be organizations needing plain language training.
- Agencies working with special needs populations. These can include persons with disabilities, Fetal Alcohol Syndrome adults, adults with English as a second language needs and so on.
- Community and social agencies working with families at risk. This category can involve social agencies, working with poor families, with Native groups or with children in an out-of-school setting. The intent with this category is to insert literacy awareness and training into the work these groups already do.

#### **4. The Logic Model**

We need to see the full picture of our organization over the next ten years. We need to have an image of the whole “forest” and not just see one tree at a time. We call this big picture a Logic Model.

This is a tool that shows all the links in a chain set up to produce specific results. A result describes what changes in the lives of individuals and communities once we have done our work.

At Laubach, **we do** the following:

- we develop and publish materials and ways of teaching literacy,
- we support students in their goals,
- we train tutors and trainers,
- we raise funds,
- we do publicity,
- we work with other partners.

The following will **change** in the lives of students as they increase their literacy skills. This will vary according to students’ goals:

- better skills for work,
- better participation in the lives of their communities,
- more power to express their ideas and their feelings to influence the future of their communities.

Also, Laubach works in society to increase understanding of literacy as a way of improving the quality of life of individuals, families and communities.

Over time, as more individuals, families and communities achieve these results because of literacy, Canada will become an even better country to live in.

A logic model is a useful tool to present on one page the full picture of an organization’s strategic plan. It is a tool that is used by all federal government departments.

The logic model involves five areas.

**Activities** - What are the key activities that people are engaged in?

**Outputs** - What are the products or services generated by the activities?

**Immediate results** - What are the short-term outcomes that flow from the activities and outputs? Outcomes in a logic model typically have an action word associated with them

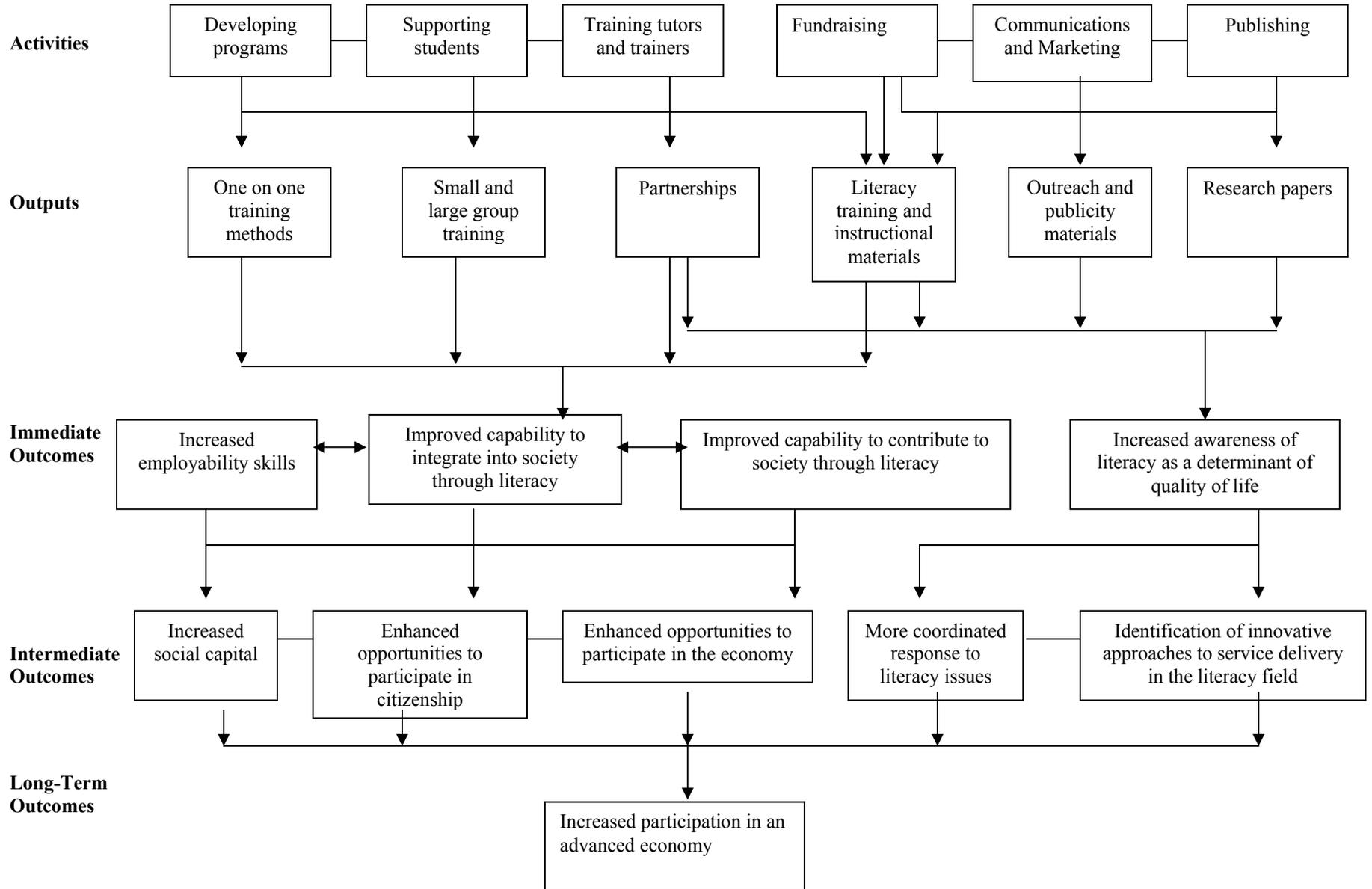
(e.g., "increased", "improved") and represent the consequences of the activities and outputs.

***Intermediate results***- What are the next links in the chain of outcomes that occur? These outcomes could be considered to be medium-term.

***Final outcomes*** - Why are these activities being engaged in? These are generally outcomes that take a longer time period to be realised.

The following logic model will guide Laubach Literacy of Canada's activities over the next five to ten years and will serve as the evaluation framework.

**LAUBACH LITERACY OF CANADA – LOGIC MODEL – 2003-2013**



## 5. The Mission Statement

Laubach Literacy of Canada's mission is the following: **As a national charitable organization, Laubach Literacy of Canada works to improve basic literacy skills to meet changing Canadian needs.**

## 6. Strategies to Achieve Results

Over the next ten years Laubach will develop three strategies.

Laubach will ensure direct services to students. Each One Teach One will continue. Laubach will also increase the number of students it reaches. Laubach will look at delivering family literacy, peer tutoring in many areas, literacy in the workplace, literacy in small groups and so on.

Laubach will also work with groups that reach a large number of people with special needs. Laubach will teach these groups how to recognize literacy needs and how to make people aware of literacy programs and services.

In certain cases, it will develop literacy training methods and tools for people that have special needs. Laubach will work with groups to deliver this training. It will also train the groups to teach literacy skills to their people if it is better to work this way.

Laubach will work with other literacy organizations to reach Members of Parliament and people that work for governments. They need to become more aware of the importance of literacy in Canada. Laubach wants more people in the public to know that many Canadians still have high needs in literacy.

This Logic model leads to three fundamental strategies for LLC. All actions undertaken by Laubach over the next five to ten years will be tied to one of these strategies. Yearly programs will identify the practical means of implementing these strategies.

Strategy One: Direct service delivery to students. This strategy touches a lot of what LLC does at present. A tutor and a student meeting is the end result of a long chain of events that include research, development of materials, publications, training in literacy methods and so on. Each One Teach One will continue to be a cornerstone of Laubach's approach, but it will not be the only approach used. At present, Laubach reaches in the range of 4,000 to perhaps 6,000 students in Canada. This reach is not sufficient for the amount of public funds received. While Each One Teach One will remain an entry point in literacy for many individuals, Laubach will also adopt a multiplier effect strategy. It will reach more people by using other delivery mechanisms, such as:

- small groups,
- classrooms,
- family literacy,
- peer tutoring,
- workplace and workforce literacy,
- technology and distance training,
- computer skills.

Strategy Two: Developing a culture of literacy. There are millions of Canadians that need literacy skills. Many of these are reached already by a wide range of social and service agencies that deliver all types of programs to high needs or at risk populations. One of Laubach's great strengths is the values and materials it has built up over the years. The intent of this strategy is to insert the literacy agenda in the contact points between these agencies and their clients. This could involve simple things such as awareness materials to the development of specialized literacy materials and skills, based on Laubach's values and methods, to reach high-needs groups.

Strategy Three: Influencing public policy. At one time, adult literacy was the work of charity. Today governments are involved in the literacy field. Literacy has therefore evolved as a public policy issue. Laubach is not a big player in literacy, but it is also not a bit player. The experience and wisdom acquired over the years and its student-centred focus must be part of the public dialogue surrounding literacy. Laubach cannot do this alone. It will partner with other literacy organizations to implement this strategy.

## 7. Performance Indicators

How do we know we are making progress?

When we travel in a car, it is easy. The number of kilometres tells us how far we moved. The time spent in the car tells us how fast we moved. The way we feel when we get home tells us if the trip was enjoyable or not.

We call these performance indicators.

Laubach gets money from the government. In return we promise we will do certain things. We need to tell the government from time to time how far we have gone, how fast we are going and how people feel about what we do. We call this answering for our actions. The official word used by governments is accountability. It means giving an account of what we have done.

Laubach will develop different ways of measuring if it is making progress or not over the next ten years.

Some of these will touch individuals:

- the number of students and tutors we have;
- the literacy skills of the students;
- how students feel about themselves;
- how students feel about their goals;

Others will touch the organization as a whole:

- how we respond to students' needs;
- how well our training methods work;
- how well we adapt to changes around us.

We will use these indicators to make reports to people. We will not just tell stories about how good Laubach has been. We will be able to show it in an organized way.

LLC will measure its progress towards achieving its results at three levels. The first level involves participants; the second, methods; and the third involves the organization itself.

### Participants (Students, Tutors, Trainers and Other Volunteers)

- The level of self-esteem of students
- The level of self-esteem of tutors and trainers and other volunteers
- Degree of goal achievement of students, and as a sub-indicator, the degree of retention of students until their goals are achieved

- Level of literacy of students
- Degree of retention of tutors and trainers
- Degree of participation in an advanced economy by students

#### Methods

- Degree of responsiveness of training methods to the needs of students, tutors, trainers, other volunteers and other agencies
- Degree of effectiveness of training methods (cost, multiplier effect and so on)

#### As an organization

- Organizational capacity to adapt to societal needs and processes
- Number and quality of organizational partnerships
- Number of volunteers, students, tutors and trainers
- Quality of governance and management

## 8. Principles of Program Delivery

In the past, Laubach has reached students through local councils. This will continue where possible.

Laubach will also reach students where there is no local council. Tutors or other groups will be supported by the Laubach provincial/territorial bodies or the national organization.

Today volunteers do many tasks in Laubach. In the future, volunteers will mainly deliver the literacy programs. We will organize paid staff to do the paperwork as much as possible.

In the past, Laubach's very identity as an organization has been wrapped up in its council structure. These Councils are volunteer-based where volunteers do everything from delivering the service to administrative duties. The Organizational Evaluation was very clear that this approach is not sustainable. The future must be different. Laubach as an organization has reached the limits of what it can achieve by this means. In the future, the local council will not be the sole delivery vehicle for Laubach literacy skills.

The following principles guide the delivery of Laubach's programs and services:

1. Ideally, Laubach programs are delivered by Laubach Councils.
2. Where there is no Council, alternative delivery mechanisms will be utilized. An example could be training staff of a Community Centre to use Laubach methods and materials to insert literacy into their programs.
3. To the extent possible, volunteers do program delivery and staff does administrative duties.
4. Tutors can also deliver services to students in the absence of Councils or partners. In this case, support services to the tutor will be given by the Provincial/Territorial Laubach organizations or by the national organization, if no provincial/territorial organization exists.

## 9. Laubach Literacy of Canada Governance Structure

Who does Laubach belong to? It belongs to its members. What do members do? They run their organization. We call this governance.

Today, members of Laubach Literacy of Canada are all students, volunteers, tutors, trainers, councils and provincial bodies. We have thousands of members across Canada.

We have seen that this is not a good way of working. It is very difficult to know what is going on in all parts of Canada from one national office.

In the future, individuals and councils will still be Laubach members, but they will belong to a Provincial Laubach Body. Each Provincial Body will organize its membership to answer to their needs. These needs can be different in each province. The national office will then reach students and local councils through the provincial bodies. This will make things much simpler.

The Provincial Laubach Bodies will be the only members of Laubach Literacy of Canada.

Members meet once a year to make decisions on what its organization should do. We call this an Annual General Meeting. This Meeting is the top decision-maker in the organization.

Members name or elect people to direct an organization for them between the yearly meetings. We call this the Board of Directors.

The National Laubach Board will be made up of the following:

- The National President elected at the Annual General Meeting.
- The Chairs of each Provincial Body. If the Chair is too busy, that person can name someone else from its provincial board to sit on the National Board in its name.
- A student representative elected at the Annual General Meeting.

This way of setting up the Board ensures that issues discussed at the national level are really important for the provincial bodies, the local councils and the students. The National President will speak for everyone at the national level as directed by the National Board.

A Board usually meets two or three times a year. Things happen in between meetings that must be looked after. A Board elects a smaller number of people to take care of these ongoing things between Board meetings. This is called an Executive. Laubach's Executive will be made up of the following:

- The National President.
- One person from the National Board elected as Vice-president.
- One person from the National Board elected as Secretary-Treasurer.

The Organizational Evaluation confirmed that LLC must redefine its governance structures. The governance structure is made up of two components. One answers the question: who are the organization's members? The other answers the question: how is the Board of Directors composed?

### **9.1 Laubach Literacy of Canada Membership**

The new structure will correct the disconnect that currently exists between the National Board and the Provincial Laubach bodies.

Laubach's make-up must ensure a direct structural relationship between students, councils, provincial bodies and the national body to ensure accountability. It must also ensure effective delivery of services.

The proposed structure is based on three principles as noted in the organizational evaluation:

1. The national level structure must be simple.
2. The Provincial/Territorial Laubach Bodies are the key structures through which the National Body can achieve its goals.
3. The Provincial/Territorial Bodies organize their Laubach governance structures and delivery mechanisms to reflect local conditions and to answer to local needs.

Laubach Literacy of Canada is structured according to the following elements.

1. Laubach Provincial/Territorial Incorporated Bodies are the sole members of Laubach Literacy of Canada.
2. A Provincial/Territorial Organization becomes an LLC member by meeting requirements contributing to Laubach's missions and goals.
3. Each member has one vote at the LLC Annual General Meeting.
4. Local councils are members of Provincial/Territorial organizations only.  
**IMPORTANT NOTE:** the term council in this document includes all service delivery mechanisms employed by the Provincial/Territorial Incorporated Body. The corporate structure of these service delivery mechanisms and their relationships with Provincial/Territorial Bodies will vary according to local needs and conditions.
5. Individuals are members of Laubach local councils and/or Laubach Provincial/Territorial organizations only, according to their By-Laws.
6. Provincial/Territorial Laubach Organizations determine their own governance policies and procedures, including voting privileges.

The Members (Provincial/Territorial Laubach organizations) will meet at an Annual General Meeting. The AGM is the supreme authority of the organization. The number of participants brought to the AGM can vary. For example, more than one delegate may come from any one Provincial/Territorial Laubach organizations. However in all instances, each Member (Provincial/Territorial Laubach organization) has only one vote.

Laubach will not pursue a strategy of being everywhere in the country. Laubach will not try to create local councils from the top-down and from its national office. Where its presence is weak on the ground, Laubach will partner with other literacy bodies to ensure access to literacy training or it will deal directly with tutors. This will become possible because local councils are not the sole building block of the new Laubach. This will ensure diligent use of public funds. In terms of accountability, Provincial/Territorial Laubach bodies will submit their By-laws to Laubach Literacy of Canada for information purposes.

## **9.2 Laubach Literacy of Canada Board and Executive Composition**

The Laubach Literacy of Canada Board of Directors is composed of the following:

1. the National President elected at large by the Annual General Meeting,
2. the Chair of each Provincial/Territorial Member, or its designate that sits on the Provincial/Territorial Board,
3. One Student Representative elected at the Annual General Meeting from among the Provincial Board student representatives.

Each Board member has one vote, except for the President who does not vote.

The Executive of the Board is composed of the following:

1. the National President,
2. two members of the National Board, to be elected by the Board as Vice-President and Secretary-Treasurer,

The Executive has no powers except those granted by the Board. Its duties are to administer the organization between Board meetings.

## **9.3 Board Committees**

The Blueprint Committee recommends the following strategy.

- All Standing Committees will be abolished.
- The Laubach Literacy of Canada Board will establish Working Committees as needed and will develop Terms of References for each Committee, including, but not limited to, mechanisms of communication, lines of reporting, methods of financial controls and evaluation mechanisms.
- Each Working Committee will have a sunset clause. This means the Board has to renew a Committee's mandate after a set period of time. A Working Committee can have a mandate extending over several years. There are no automatic renewals. This ensures that any Working Committee set up by the Board will respond to a real need.

- Each Provincial Body will have a student representative on its Board, reflecting local needs and conditions.
- Each Laubach Literacy of Canada member will have its student representative in attendance at the National Laubach Annual General Meeting.
- Students attending the National Annual General Meeting will form a Student Caucus.
- The Student Caucus will elect a student to be a voting member on the National Board. This person must be chosen from among the provincial student representatives present at the Annual General Meeting. The students from each Laubach Provincial Body will have one vote for the election of the student on the National Board.
- There will be no representative from ProLiteracy Worldwide on the National Laubach Literacy of Canada Board.

This strategy means that each Provincial Body will ensure that a student representative sits on its Board. Each Provincial Body will implement this requirement according to their local needs and conditions.

All students attending the Annual General Meeting will form a group of students to decide on their representation on the National Board. This group is called a caucus.

The students from each Provincial Body will have one vote for the election of the student representative on the National Board as defined in the Bylaws. This method ensures equity among all the Provincial Bodies.

#### **9.4 Roles of the Different Levels**

With this structure, the roles of the various levels of the organization are described in the following table.

<b>Level</b>	<b>Functions</b>	<b>Accountability</b>
Local Councils and other Delivery Mechanisms	<ul style="list-style-type: none"> <li>• Direct Service Delivery</li> <li>• Student-centred focus</li> </ul>	Report to Provincial/Territorial Organizations. Will send statistics to the provincial organization. LLC will develop one form for statistics.
Provincial/Territorial Organizations	<ul style="list-style-type: none"> <li>• Support to local councils and other delivery mechanisms</li> <li>• Implement standards and training guidelines</li> </ul>	Accountable to their members and responsible for their commitments to the National Body.
National	<ul style="list-style-type: none"> <li>• Support Provincial/Territorial Organizations</li> </ul>	Accountable to its members.

Level	Functions	Accountability
	<ul style="list-style-type: none"> <li>• Establish standards and training guidelines</li> <li>• Develop national strategies related to product development and training methodologies</li> <li>• Work on national policy issues</li> </ul>	<p>Reports to its members and to national funders.</p> <p>Ensures evaluation every five-years based on the Logic Model.</p>

## 10. Management and Staff Structure

Laubach will put all its national office staff in one office. This will be in the Ottawa region because it is the capital of the country. Many national organizations have their offices in Ottawa to be closer to the government that funds them. This staff will accomplish many things. Some will look after the administration and finance. Others will be working to support students, others to support volunteers, others to develop training and so on.

Laubach Canada will also have staff that will work to support provincial bodies. We will call them Regional Development Coordinators. We see five such persons:

- One for British Columbia and Alberta,
- One for Ontario,
- One for Québec,
- One for New-Brunswick, Nova Scotia and Prince-Edward-Island,
- One for Newfoundland and Labrador.

The Regional Development Coordinators should have offices in the regions.

Details about the staffing will be worked out later. We think it will take 2 or 3 years to put all this in place.

The Organizational Evaluation made many comments about Management and Staff structures.

To address these issues, the following National staff functions are to be implemented, based on current budget capacities.

One National Office, to be housed in the National Capital Region, composed of the following:

- Executive Director,
- Financial administration,
- Administrative assistant,
- Training expertise,
- Student development expertise,
- Volunteer and partnering development expertise,
- Resource generation expertise.
- Regional development coordinators to support provincial organizations, as needed. (For example, there could be one for British Columbia /Alberta; one for Ontario; one for Québec; and one for the Maritime Provinces and one for Newfoundland and Labrador. The Regional Development Coordinators will support the Provincial/Territorial Bodies in their work of supporting the Councils and local delivery mechanisms. They would be housed in the regions.)

The Board of Directors will study the feasibility of partnering with other literacy movements with national offices in the National Capital Region to develop one Literacy Expertise Centre. This could take many forms and involve new ventures, including buying a building together. The purpose is to strengthen the literacy movement through collaboration and to maximize the efficient use of public funds.

### **11. The New Readers Bookstore**

The New Readers Bookstore in Saint John, New Brunswick belongs to Laubach. It sells materials. It will be set-up like a private business. It will give good service and at the same time make money for Laubach.

The Product Development and Marketing Committee has developed a parallel and converging strategic plan for the NRB.

For improved governance, as well as for increased business effectiveness and efficiency, the NRB will become a distinct entity. It will be a profit centre at arm's length from LLC and financially contribute to LLC's programs and services. This entity would be managed by its own Board and empowered to act on its own, but in the best interests of LLC. Some key concepts for this Board would be:

1. It would be responsible for creating its own mission and mandate supportive of LLC's.
2. It would consist of 5 to 7 members chosen for their expertise in such areas as merchandising, marketing, finance, law, e-commerce and education.

3. The NRB should remain in Saint John with its Board chosen from the area and with ties to the Community Business/E-commerce Department of the University of New Brunswick, Saint John.
4. A process would need to be developed to deal with start up costs and legal requirements for the formation of the Board and the NRB entity, with perhaps a draw from the LLC reserves, if necessary.

## 12. Training and Certification

The Organizational Evaluation spent a lot of time on our training methods. It pointed out some issues that must be fixed:

- The rigidity of the training process.
- Non-recognition of previous training/teaching experience.

Laubach Literacy of Canada's training system has become somewhat bureaucratic and complex. As a result too few tutors are trained. Also many tutors have told us they do not become trainers because the process is just too complicated and lengthy.

### 12.1 Certification Strategy

The Sub-Committee on Certification carried out a lot of research and consultation to gather best practices in the literacy field concerning Certification. The key findings are the following.

Certification programs:

- a. Require or evaluate prior learning.
- b. Ensure staff support, especially for administration.
- c. Are continually updated.

Certification is to be based on the following principles:

- Respect a volunteer's time and skills
- Be flexible
- Be accessible
- Be inclusive and open to collaboration, partnerships and other ways of doing things that result in the development of competent and confident literacy trainers
- Teach adult education processes in addition to the use of our products

Laubach Literacy of Canada will undertake a complete and thorough re-thinking of its certification system. This work is to be led by outside, professional and unbiased subject-matter experts, in consultation with Laubach Literacy of Canada trainers and apprentice trainers, among others, and completed by June 2006.

This process will be guided by the following parameters:

- Establish revised national standards of certification for tutors and trainers
- Recognize prior learning
- That certification be done in partnership with other institutions

- That staff be responsible for administrative processes, related to certification
- Incorporate the use of technology

The certification process be reviewed and updated every three years.

## **12.2 Training of Tutors**

The following strategies will guide the training of tutors.

1. The training of tutors must be based on the following principles:
  - Respect a volunteer's time and skills
  - Respect students
  - Be flexible
  - Be accessible
  - Be responsive to local community conditions and partners
  - Be inclusive and open to collaboration, partnerships and other ways of doing things that result in the development of competent and confident literacy tutors
  - Teach adult education processes in addition to the use of our products.
2. Laubach Literacy of Canada will continue to develop, implement and evaluate LETS (Laubach Enhanced Training Strategy).

## **12.3 Strategy for Training and Certification**

In light of the above, the following strategies will guide the Training and Certification.

1. LLC will align its training processes with its certification processes.
2. LLC will develop a marketing strategy with regards to publishing training materials and licensing their use.

## **13. Communications and Public Relations**

### **13.1 Internal Communications**

The following elements will guide communications within Laubach Literacy of Canada.

1. Laubach Literacy of Canada communicates with its members – the Provincial Bodies. The Provincial Bodies in turn communicate with their local councils and members. The reverse also applies. Local members and councils will communicate with their Provincial Body who will communicate with Laubach Literacy of Canada.

2. National Committees answer to the National Board. The details concerning the lines of communication and reporting will be specified in the Terms of Reference for each committee.

In a concrete way, this principle means that communications will occur in the following manner:

- Laubach Literacy of Canada national staff will communicate with the Executive Director, who will communicate with the President, who in turn communicates with Board members. The Board members are the Provincial Chairs or their designate. As Provincial Chairs, Board members communicate with their Provincial Body, Councils and local members according to their structures and procedures. Communication from the local level back to the national level moves along the same chain.
- The President will send out regular updates to the Board.
- Laubach Literacy of Canada will have some regional staff. Details will be worked out over the coming two years or so. This staff will work with the appropriate councils in the regions but will report to the Executive Director of Laubach Literacy of Canada.
- Each province will develop its internal communication structures with councils and members according to their needs.
- If there is no incorporated Provincial Laubach Body in a region, Laubach Literacy of Canada will explore other communication options with individuals interested in tutoring or being students.
- The National Board will form committees as needed. Terms of Reference will be developed for each committee that is struck. Lines of communication and reporting procedures will be developed on a case by case basis according to the needs.

### **13.2 Database**

Currently, LLC struggles to obtain accurate and timely statistics from many local councils and provincial organizations. The database needs to be up-dated and kept current.

There is duplication in the current distribution lists with multiple copies of mailings going to some readers and other copies being sent to readers who are no longer involved in Laubach activities. The database could also be used more strategically, if it were easier to sub-divide or segment for targeted mailings, e.g. for fundraising appeals. With the new membership structure of Laubach Literacy of Canada, a shared database for Laubach Literacy of Canada and Provincial Bodies will be explored.

At the operational level, Laubach Literacy of Canada will:

- update the database,
- define use, target mail-outs, segment as needed
- rebuild the database if necessary to be:
  - efficient

- useful to provincial/local bodies
- useful to the national level
- able to accommodate other uses

### **13.3 Public Relations**

National, provincial and local public relations and fundraising are inter connected for most national charitable organizations. Laubach is not an exception to this. Laubach Literacy needs a strong provincial and national image. It is very important that local students, tutors and other volunteers identify closely with their local Councils and with their Provincial Bodies before identifying with the National Body.

Because Councils all use the Laubach name or are identified with the Laubach methods, the actions of one can have an impact on all. A crisis management strategy is therefore required.

One of the roles of the National Body is to strongly support the Provincial Bodies in terms of public relations.

For reasons of efficiency and cost-effectiveness, the following strategy will guide public relations.

1. Guiding principle: The local/provincial image of Laubach is front and center at all times.
2. In collaboration with the Provincial Bodies, Laubach Literacy of Canada's role is the following:
  - Develop a permanent and adaptable/flexible public relations campaign and fundraising tools that can be distributed to Provincial Bodies and local councils for their adaptation and use.
  - Find one national publicly recognizable image or person that the public can identify with Laubach.
  - Offer training to Provincial Bodies on how to do public relations.
  - Be the national spokesperson for the Provincial Bodies on national issues through the President of the National Board.
  - Develop a crisis management policy, in collaboration with the Provincial Bodies.
3. Provincial roles:
  - Participate with the other Provincial Bodies and the national level in developing the public relations and fundraising strategies.
  - Adapt and implement the public relations and fundraising strategies in local areas according to their own local conditions and needs.

## 14. Human Resource Development Plan

In Laubach Literacy of Canada, human resource development includes both staff and volunteers. Effective programming requires positive working relationships between staff and volunteers. The organizational evaluation pointed out several difficulties in this area that need to be addressed.

All staff need to know how to work with volunteers. All staff are involved in volunteer development and management of volunteers. Laubach Literacy of Canada should strive to create a professional environment that allows for advancement and skill development of volunteers and staff.

Part of creating a professional working environment also means coming to grips with other aspects of volunteer and staff management. Of utmost importance is the need to ensure volunteer management policies, including volunteer screening standards, are in place for all Laubach bodies.

The following strategies will guide Laubach Literacy of Canada's actions concerning human resource development.

1. *Core Principle:*

Laubach Literacy of Canada is a continuous learning organization. For both volunteers and staff, Laubach Literacy of Canada will adopt a professional development policy that will respond to ongoing needs.

2. *Strategy for Staff Training*

- The staff human resources policy will include a professional development framework and provide for staff training.

3. *Strategy for Governance Volunteer Training*

- Laubach Literacy of Canada will develop and implement an ongoing professional skills development program for volunteers.
- The role of the national level is to organize training for the National and Provincial Boards.
- The Provincial Bodies will organize the local volunteer training.

4. *Strategy for Volunteer Development*

Volunteer development will include but not be limited to the following principles:

- Each volunteer is to have a description of his or her tasks and expectations.
- Every Provincial Laubach Body will adopt a volunteer management policy, including volunteer screening.
- Laubach Literacy of Canada and the Provincial Bodies will have the mechanisms in place to protect their organizations and volunteers (e.g. volunteer screening policy, liability insurance, etc.)

5. *Strategy for student intake*

Laubach Literacy of Canada will establish a student intake process.

**15. Financial Resources (Business Plan)**

LLC has financial challenges.

Currently it is largely dependent on one source of government funding.

Government trends indicate that funds for literacy that lead to the economic integration of students will continue to be available to effective organizations in the future. However government funding for literacy that helps students integrate more fully into society in ways other than being employed will likely be limited.

Laubach Literacy of Canada has always put a significant emphasis on teaching literacy to those who want it, regardless of whether their motivation is greater economic or social integration. To maintain the ability to deliver literacy to a broad range of students, LLC will need to diversify its funding base.

The following strategy will guide Laubach Literacy of Canada's actions in this area.

The new Laubach Literacy of Canada Board will develop a multi-year business plan as a first order of business and explore all options including but not limited to the following:

- Laubach Literacy of Canada will maximize its funding from sources that support the economic integration purpose of literacy. (These sources are usually government departments with an economic mission.)
- Laubach Literacy of Canada will maximize its funding from sources that support the social integration of students who are in literacy programs for other than economic reasons. (These are usually Foundations or government departments with a social mission.)

- Laubach Literacy of Canada will adopt a principle that any profits from its New Readers' Bookstore given to Laubach will be used for purposes of literacy aimed at social integration of students.
- Laubach Literacy of Canada will diversify its funding sources by developing revenue generation activities such as *English for Speakers of Other Languages*.

## **16. The Role of Publishing**

At the 2003 Annual General Meeting, it was decided that the New Readers Bookstore (NRB) will become a distinct profit-making entity. This decision opens up the possibility that NRB could take on the publishing activities of LLC as one of its business streams.

The LLC Publishing Committee has been exploring the role of publishing in Laubach Literacy of Canada's programming activities and has submitted a report to the Board during its October 2003 meeting. The Publishing committee will continue its task and bring recommendations to the Board in 2004 as to the future steps for publishing and the best location for these activities. Two members of the Publishing Committee sit on the Blueprint Committee.

The Blueprint Committee recommends the following strategy concerning the role of publishing: That the New Readers Bookstore includes the publishing activities of Laubach Literacy of Canada as one of its business streams.

## **17. Evaluation**

The Strategic Plan will be evaluated according to the process proposed by the Treasury Board Secretariat of the federal government.

A formative evaluation will be carried out after the second year of the implementation of the Strategic Plan to ensure that policies and processes in place will lead to the intended results.

A summative evaluation will be carried out in the fifth year of implementation to measure the progress accomplished in carrying out the Plan.