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ABSTRACT

This guide was developed to help new literacy practitioners in Ontario, Canada, become familiar with designing, developing, and delivering literacy programs in the community. The guide is organized in 10 sections according to subject area. The three sections of part 1 deal with the developmental stages of planning, designing, and launching a program. The seven sections of part 2 address topics of concern in active programs, including the following: getting started in community literacy work, teaching adults to read and write, working with volunteers, working with learners, working outside the program, communication skills, support for literacy workers, administration, resources, and job description for community literacy organizers. Each section offers a summary of tips and is followed by a list of selected resources for more in-depth information on that topic. (KC)

RESOURCE GUIDE

for

LITERACY PRACTITIONERS

Validation Draft

For Discussion Purposes Only

ACKNOWLEDGEMENTS

I am indebted to the kind assistance of many literacy coordinators and consumer advocates serving people from varying backgrounds throughout Ontario. The following people provided substantial time and expertise in the shape, focus, themes and tone of the Guide and deserve special mention here:

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Thank you all for your input and assistance. I trust that this Resource Guide will be a handy reference book for new (and old!) literacy coordinators who work so hard to deliver quality programs across the province.

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RESOURCE GUIDE

HOW TO USE THIS GUIDE

This Guide has been developed to help the new literacy practitioners become familiar with various aspects of designing, developing and delivering literacy programs in the community. New steering committees, Boards of Directors, coordinators and literacy staff all have dozens of questions about their programs and where to find information.

For convenience, the Guide has been organized according to subject areas. Part I deals exclusively with the developmental stages of planning, designing and launching a program. Part II addresses topics of concern in active programs. Sections of both parts will be of interest to literacy workers, regardless of their length of time in the field.

Each section offers a summary of tips that have been presented, and is followed by a list of selected resources for more in-depth information on that topic. Our intention has been to produce a "pocket guide" to get people started, rather than an exhaustive and comprehensive listing of all resources available. The resources mentioned are those which we have found particularly useful in our work, and/or are highly recommended by consultants actively working in the literacy field.

Many resources will be available through the Resource Centre at 2 Park Road, Toronto. Addresses and phone numbers (where possible) have been furnished to speed you through the ordering phase. Materials from England (ALBSU) are best ordered directly from England. Be sure to send British currency or an international money order with your request.

Please flip through the Guide, focusing in on those sections that are relevant and interesting to you. We would welcome your comments on this Guide, particularly suggestions which could be incorporated into any future editions.

Good luck with your program!

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TABLE OF CONTENTS

PART ONE: PROGRAM DEVELOPMENT

PART TWO: PROGRAM SKILLS

QUESTIONNAIRE

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PART I

PROGRAM DEVELOPMENT

1. HOW TO START A PROGRAM

A. INTRODUCTION

Community-based literacy programs in Ontario have developed in a wide variety of settings. Some have started with the creation of their own independent literacy organizations; some have grown out of existing organizations such as libraries and social service agencies; some are affiliated with other adult education programs. No two programs have gone through the same process of development. This chapter is therefore a generalized description of how to start a community literacy program, not a recipe. The order of developmental phases and their emphasis should be adapted to meet the unique circumstances of each community.

i. ESTABLISHING A WORKING GROUP

Although a community-based literacy program must be more than a collection of individuals in order to be both stable and dynamic, in the beginning this is usually exactly what it is. Getting a group of interested people together is probably the best place to start. This group might consist of:

- people in the community who already have an interest in the issue
- people who work in local organizations and agencies who are aware of literacy through their work
- prospective tutors and learners.

They can be brought together initially in a variety of ways, including:

- a film or video night
- a round table discussion
- a social event
- presentations to local service clubs.

Informal networking between individuals from local organizations is another common way things get started. It might just mean getting together for a coffee on a regular basis to talk about the possibility of a program. In the early stages this will probably be more useful than organization to organization meetings.

KEY RESOURCE:

- TVOntario, *Out of the Shadows: Adult Literacy, Issues and Illuminations.* Toronto: TVOntario, 1983.

  Topics covered:

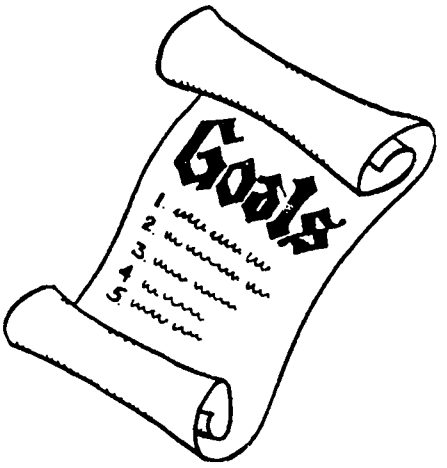
  Issues relating to starting a literacy program, rural and urban settings, the role of volunteers.

  Available from:
  TVOntario Customer Service
  Box 200, Station Q
  Toronto, Ontario
  M4T 2T1
  (416) 484-2612

ii. MISSION STATEMENT, GOALS AND OBJECTIVES

Once the group is together, it is a good idea to find a focus, even on an informal basis. This can be done by outlining the group's general goals and purposes in the form of a mission statement. These might include:

- the goals and objectives of your group
- the mandate of the program
- the philosophy of the program (I.e. the underlying principles of your work, your ultimate purpose in teaching literacy e.g. social/political empowerment, etc.)
- the approach to literacy teaching
- any specific local conditions which have affected or will affect the shape of your program.



A mission statement might answer questions such as:

- what will be the purpose of the program?
- how will the program benefit the community?
- how specific will the program's role be, for example, will it be exclusively instructional?
- how will the program relate to groups in the community who have not been well served in the past?
- how will the program relate to the wider literacy field?

B. ASSESSING COMMUNITY NEEDS

The next step is to assess the community's adult literacy needs. This is the key step in the program's developmental process since it will eventually determine its model of delivery and methodological approach.

Before proceeding with the literacy needs in particular, it is important to determine the nature of the community as a whole. The group may feel that it understands this already, but it is often surprising how much new information can emerge from an effective and critical analysis of the community, even for people who have lived there all their lives. One way to do this is to examine the "structure" of the community in terms of:

- services – government services, libraries, etc.
- population – by age, mother-tongue, education, etc.
- geographical factors – transportation, climate, etc.
- politics – political culture, provincially, federally, locally
- economic factors – employment, unemployment, social assistance recipients, etc.

One way to go through this analysis is by "mapping" the community. (This process is described in the Ah-Hah! Seminars listed in the bibliography.)

A next step is to make some links in the community. By having community support, your needs-assessment will have a better chance of succeeding by drawing on all possible sources of information. You can do this by explaining your needs-assessment project at community activities such as meetings, interagency information exchanges and planning sessions.

The research part of the needs-assessment might come from a variety of sources, including:

- existing documents – previous studies of needs-assessments
- Statistics Canada
- personal observation
- workshops
- talking to prospective learners.

The needs-assessment should also include information on existing education programs in the community, including:

- community colleges
- boards of education

- parent groups
- employment programs
- workplace training programs.

The last phase of the needs-assessment is the analysis of the data which has been generated. This will probably require a well-planned and facilitated workshop or meeting followed by a written report. The group must also decide at this point who will do what and when it will be done. One approach, if the group is large enough, is to create task teams to work on different aspects of the analysis.

Some things to watch for in the data collected from the assessment:

- possible sources of funding and support in the community
- other existing resources in the community, i.e. free space
- possible collaborations
- specific target groups
- issues relating to access to the program, particularly for people with disabilities.

The needs-assessment does not have to be objective in the sense of being completely detached, requiring a view from outside the community. Instead it can be the first phase in the interaction between the program and the community.

Finally, to be effective, the needs-assessment should never lose sight of the perspective of those people whom the program is for: the learners.

KEY RESOURCE:

- Abbey-Livingstone, Diane and Abbey, David, *Enjoying Research? A "How To" Manual on Needs-Assessment*. Toronto: Recreation Branch, Ontario Ministry of Tourism and Recreation.

  Topics covered:
  Purpose of needs-assessment, research methods, estimating time and costs, designing and administering questionnaires, analyzing research results.

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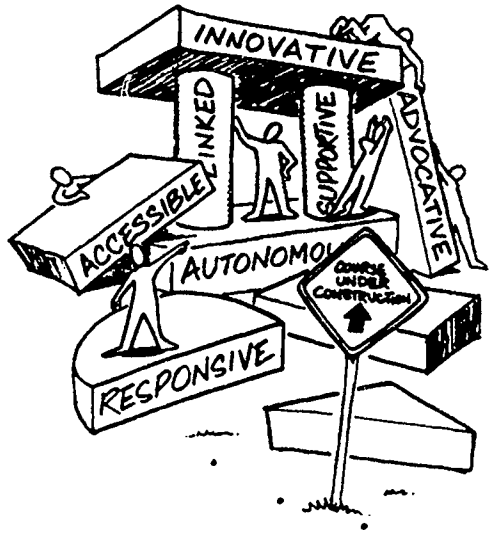
Publications Ontario
880 Bay Street
Toronto, Ontario
M7A 1N8.

C. CHOOSING A MODEL



After getting a sense of the community's literacy needs, the group can begin to consider the program model which will best meet them and existing programs are the obvious source. However, this can cut two ways. On the one hand, it is important to learn from previous practice in the field. On the other hand, no two community programs will be alike and adopting another community's model may prove to be a limitation in the long run. Much of the success of a literacy program depends on its ability to balance the "tried and true" approaches with innovative ideas suited to the community's unique needs.

In any case there are some features which are common to all programs which are properly described as community-based:

- **Autonomous** from political, educational and administrative points of view
- **Accessible** to, and implanted in, the WHOLE community
- **Linked** to other organizations and deliverers in the community
- **Participatory** by having a democratic structure which promotes learner involvement
- **Innovative** in terms of outreach, methods, curriculum and materials
- **Advocative** on behalf of learners in programs and undereducated adults in the community at large
- **Supportive** of staff in terms of staff training and development as facilitators, advocates and counsellors
- **Responsive** to the changing needs and wants of the community.

Different programs respond to these principles in different ways. A sampling of program models are provided below. Some newer, innovative models are yet to be tried, such as inter-generational learning, programs for parents, programs linked with learning other skills, etc.

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D. FUNDRAISING

i. PITFALLS OF FUNDING CRITERIA

Depending upon your funding source, there can be pitfalls to the funding criteria. Acceptance of certain funding could mean altering the dynamics of your program, changing your mandate or target group, depending upon the demands made by the funder. Some funders may have criteria about learning settings, materials, tests to administer as part of an evaluation plan, etc. Each program has to decide for itself which criteria are acceptable and which are too far removed from the program's own mandate and philosophy to be feasible within the context of the program.

Whatever decision you make, know the facts and how you can work within the framework. Again, a funding base with multiple funding sources can alleviate some of the pressure funders can create by distributing funds according to certain segments of the program. So, for example, one funder may provide funds to cover a drop-in component for single, unemployed parents; another may cover one-to-one tutoring for individuals. By combining these funding sources, the restrictions can be used to an advantage by diversifying the program base and service delivery model.

ii. SOURCES OF FUNDING

Potentially, there are a tremendous number of fundraising sources:

- business
- government
- foundations
- service clubs
- awards
- events
- individual membership drives
- community.

Generally, the broader the funding base of your organization, the more secure your program. If one source of funding expires or is reduced, other sources can tide you over until new areas of funding are secured.

iii. FUNDRAISING STRATEGIES

The following guidelines will contribute to the success of your fundraising campaign:

- Find a competent person to head your fundraising drive. Develop a good fundraising committee of the Board. Professional fundraisers do exist, and have proven useful to certain, larger programs

requiring a large funding base. Keep in mind, however, that they require monetary compensation for their efforts, so weigh out the cost vs benefit very carefully.

- Create a simple, concise way of describing your program and objectives.
- Draft a brief statement of the principles of your group and your fundraising goals. Be concise, logical, accurate and convincing.
- Draft a budget in order to outline the financial scope of your needs. Include items funded through other sources and indicate where those sources were derived.
- Develop a fundraising plan to target appropriate sources and best approaches.
- Research the organizations you are approaching. Ensure you know something about them, the kinds of projects they find attractive, how your program matches their mandates/objectives and, especially, how helping your program will help them.
- If applying for grants from government, acquaint yourself with the grant criteria, highlight areas where your mandates match, and utilize the government contact to answer questions about format, detail and documentation required.
- Utilize "in kind" donations, i.e. time, donation of services or material donations of goods which can offset costs.
- Use a variety of means to raise money. Remember to send thank you letters for successful attempts and courtesy updates, even if not specifically required by the funders. Some fundraising events may draw publicity or can be specifically designed to attract media attention: capitalize on the attention you attract.
- Once you have submitted a proposal, check on its status regularly.

iv. PROPOSAL WRITING

The most important point to keep in mind is to prepare proposals that are brief, clear and written in plain English.

- Keep a photocopy of everything you submit and a checklist of enclosures accompanying your proposal.
- If you have access to word processing equipment, multiple proposals can be produced in less time by repeating information from one grant to another. Be sure to individualize proposals to the extent the form suggests.
- Answer questions, wherever possible, in the spaces provided. If more detail is required, attach it to the pertinent page or include a summary in the given section and refer to an Appendix where the detail may be found.
- Clearly reference Appendices, and separate Appendices from the proposal. Make use of binder dividers and tabs to make your information easy to access.
- Do not rearrange pages or substitute pages from grant proposals unless advised to do so.

- Use summary statements followed by point form wherever possible.
- Highlight pertinent phrases or key statements by underlining or boldfacing the text.
- Maintain current financial data and statistical information on your program. Whenever it is required for a proposal or an update, the information will always be at your fingertips.

CHECKLIST FOR GRANT PROPOSALS

TITLE – Should be short and to the point.

TABLE OF CONTENTS – Helps the reader locate specific areas of your proposal.

SUMMARY – Definitely include a summary. People are busy and may need rapid access to the key point(s) of the proposal. This could be one of the most important parts of the proposal.

INTRODUCTION – Should explain what the organization is, its origins, significant accomplishments, etc. It builds credibility for the program.

STATEMENT OF NEED – Explains precisely what the funds are required for. Include background rationales such as: statistics of the population of the area you serve; the proportion of people who potentially need help to learn to read and write; the number of learners waiting to be served by your program; the number of learners already served; the impact upon a person's life who has learned to read and write.

PROJECT/PROGRAM OBJECTIVES – In general terms, describe the long- and short-term goals of your program or project.

DESCRIPTION – Explain what your organization does, how it does it, its size, the target groups for this specific program, who the leaders are, management methods, personnel, what the project will accomplish, duration of the program or project, etc. Include anything that is relevant; omit pieces that are not requested or include them in Appendices.

BUDGET – Make sure it is accurate. If space is minimal on the form, include a summary on that page, referring to a detailed budget in the Appendix.

Consider the following headings:

- Item
- Actual Cost
- Rationale
- Funds from Other Sources (including "In Kind")
- Amount Requested from this Funder

At the bottom of the budget sheet, clearly state the time period indicated (e.g. 12 months, 6 months) with specific dates.

FUTURE FUNDING – Indicate from where you assume future funds will be available. Indicate any plans for requests for funds from other sources or whether they will be derived from independent funding/membership drives.

LETTERS OF SUPPORT – Are becoming increasingly important for first-time funding proposals. They should be from a broad spectrum of individuals and agencies with whom you are in touch. Your local MP or MPP may be willing to endorse your program also. Include letters from learners and tutors in your program.

APPENDICES – Include any other pertinent documentation. Make sure there are references to each Appendix within the text of the proposal. Clearly mark and tab all Appendices. Items which may be included are:

- detailed budgets
- job descriptions
- news articles, media events
- samples of brochures, publicity, events, flyers
- letters of support
- audited financial statements
- list of the Board of Directors
- list of members/member groups.

KEY RESOURCE:

- Bohnen, Elizabeth D., *Effective Proposal Development: a How -To Manual for Skills Training Programs*. Toronto: George Brown College and St. Stephen's Community House 1988.

  Topics covered:
  Planning, fundraising, sources of support, preparing a proposal.

  Available from:
  Publications Ontario
  880 Bay Street
  Toronto, Ontario
  M7A 1N8

E. ORGANIZATIONAL DEVELOPMENT

i. BOARD RECRUITMENT

Literacy programs tend to form Boards of Directors, initially so that there is a legal "body" through which to direct funds. However, there is room for exploration of other models such as collectives, cooperatives, spin-offs from other existing institutions, Boards, action committees, etc.

Assemble a Board with a wide range of expertise. Include:

- learners
- tutors
- someone with knowledge in the community literacy field and/or adult education
- an efficient fundraiser
- a competent planner
- a professional such as an accountant, treasurer, or a lawyer who might help you incorporate
- someone who is there for pure enthusiasm and wild ideas.

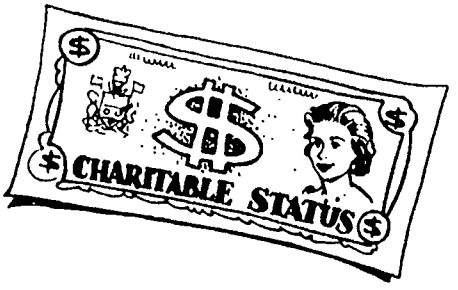
All Board members should receive an initial orientation to ensure they understand and agree to the principles of literacy delivery in the context of the mandate and philosophy established by the working group. If no consensus can be reached, the mission statement should be modified so that everyone feels comfortable with it.

Above all, commitment is essential. Board members need to be aware of their duties and responsibilities, both moral and legal, so that they can live up to each other's expectations. A weak Board will not succeed in launching a program.

ii. CHARITABLE STATUS

To gain charitable status, you must apply to Revenue Canada and meet their definition of a "charity". At present, a mandate including "education" is considered by Revenue Canada as a charitable activity.

The advantage of Charitable Status is that it legally allows you to fundraise for a recognized charity and allows you to issue tax receipts, saving donors and funders – either businesses or individuals – from paying tax on funds they donate to your organization. In addition, Charitable Status exempts you from paying annual taxes on funds raised and can sometimes exempt your organization from certain charges, such as service charges at participating banks. It is always important to ask if there are benefits for non-profit, charitable organizations!



iii. BYLAW

When writing up the bylaw, make sure all the Board members are present. Your organization should have a bylaw whether you choose to incorporate or not.

To shorten the usually long process of drawing up your own bylaw from scratch, it is preferable to refer to those of other literacy organizations. Add or delete items to reflect your unique mandate and make alterations as needed. Try to find a legal contact who is willing to donate occasional services or, better yet, to participate on the Board to assist in these and other legal matters.

KEY RESOURCE:

- Ontario Ministry of Citizenship and Culture,*Resources For Community Groups*. Toronto: Ontario Ministry of Citizenship and Culture, 1985.

  Topics covered:
  Incorporation, charitable status, funding approaches and sources, umbrella organizations, proposal writing.

  Available from:
  Publications Ontario
  880 Bay Street
  Toronto, Ontario
  M7A 1N8

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ANNOTATED BIBLIOGRAPHY

- Abbey-Livingstone, Diane and Abbey, David, *Enjoying Research? A "How To" Manual on Needs-Assessment*. Toronto:Recreation Branch, Ontario Ministry of Tourism and Recreation.

  A good look at the purpose of needs-assessment, research methods, estimating time and costs, designing and administering questionnaires, analyzing research results. Available from Publications Ontario, 880 Bay Street, Toronto, Ontario, M7A 1N8.

- Alkenbrack, Betsy, "Getting Started: Our Experience with Community Based Literacy," from *Literacy/Alphabétization*. Saint John: Movement for Canadian Literacy, (no date).

  This short article from the journal of MCL tells the story of East End Literacy, Parkdale Project Read and the Toronto ALFA

Centre, all Toronto programs. As well as giving a short history of each project, the article lists and provides summaries of various steps along the road to developing programs.

- Brandow, Karen, McDonnell, Jim, and Vocations for Social Change, *No Bosses Here! A Manual on Working Collectively and Cooperatively*. 2nd. Edition. Boston: Aupon Publications, 1981.

  A manual which describes the process of establishing and maintaining a working environment which thrives on collective decision-making. Available from Aupon Publications, P.O. Box 2783, Boston, MA O22O8 and from Vocations for Social Change, P.O. Box 2118, Essex Station, Boston, MA O2112.

- British Columbia Ministry of Education, *"Assess Community Needs,"* from *CE Programmer's Manual*. Vancouver: B.C. Ministry of Education, 1981.

  This section of the Programmer's Manual provides information on assessing the needs of a community. It gives advice on where to look for information in a community as well as on gathering new information. It is complemented by examples and sample forms.

- Doyle, Robert and de Leeuw, Catharine, *Fundraising for Stability – Strategies for Community Fundraising*. Toronto: Committee of Planning and Coordinating Organizations, 1987.

  Outlines principles of fundraising, planning fundraising, sources of support, preparing a proposal, innovations in fundraising. Available from COPCO, c/o Social Planning Council of Metropolitan Toronto, 950 Yonge Street, Suite 1000, Toronto, Ontario, M4W 2J4.

- Gatt-Fly, *Ah-Hah! A New Approach to Popular Education*. Toronto: Between the Lines, 1983.

  This easy to follow book illustrates a process, and presents the techniques, for assisting individuals to use their own experiences for coming to an understanding of political and economic systems.

- McMullen, Lorie, *The Board-Staff Workbook*. Edmonton: Edmonton Social Planning Council, no date.

  This workbook contains information on establishing a Board of Directors, getting it to work efficiently, and evaluating its effectiveness. It is enhanced by exercises and illustrations.

- Ontario Ministry of Citizenship, *Resources for Community Groups*. Toronto, 1985.

  Topics covered include incorporation, charitable status, funding approaches and sources, umbrella organizations, proposal writing. Available from Publications Ontario.

- TVOntario, *Out of the Shadows: Starting Points in Starting Literacy Programs*. Toronto: TVOntario, 1983.

  This collection of articles which accompanies TVO's videos of the same title, contains four essays which are essential reading for anyone planning to start a program.

  "Expanding the Neighbourhood: Literacy Teaching in a Rural Area" deals with the process and problems of developing a literacy program in a rural area. Although it concentrates on a rural program, it is also a useful guide to organizing in general.

  "Now is the Time for Patience: Starting a Literacy Program in an Urban Environment." This chapter was written by two founders of the ALSO project in Ottawa. Like the above chapter, it concentrates on the process of establishing a literacy program. Unlike the above, it concerns itself with the specifics of creating a program in an urban setting.

  "Starting a Program.: Issues and Concerns" by Jenny Horsman identifies a number of key questions to pose at the start of a program's development.

- The Women's Self-Help Network, *Working Collectively*. Campbell River, B.C.: North Island Women Services Society, 1984.

  A descriptive book on working collectively. Available from Ptarmigan Press, 1372 Island Highway, Campbell River, B.C. V9W 2E1 (6O4) 286-O878.

- Young, Joyce, *Fundraising for Non-Profit Groups*. Vancouver: Self-Counsel Series, 1981.

  A practical guide to fundraising with good chapters on corporate funders, fundraising in small communities and direct mail.

See Also:

- *Development Today; a Fund Raising Guide for Non-Profit Organizations* and *The Grantsmanship Centre Whole Non-Profit Catalog; a Compendium of Sources and Resources for Managers and Staff*

of Non-Profit Organizations. Both titles available from the Grantsmanship Centre, 650 S. Spring St., #507, P.O. Box 6210, Los Angeles, California, CA 90014.

- *Grassroots Fundraising Journal*, available from 517 Union Avenue, Suite 206, Knoxville, Tennessee, TN 37902.
- *The Canadian Directory to Foundations and Granting Agencies* and *The Canadian Index to Foundation Grants*, both from The Canadian Centre for Philanthropy, 3800 Yonge Street, Suite 4080, Toronto, Ontario M4N 3N1, or phone (416)484-4118.
- *The Proposal Writer's Swipe File: Twelve Professionally Written Grant Proposals – Prototypes of Approaches, Styles and Structures*, ed. Jean Brodsky, from Taft Productions,Inc., 100 Vermont Ave., N.W., Washington, D.C. 20005.

KEY ORGANIZATION:

The Canadian Centre for Philanthropy
3080 Yonge Street, Suite 4080
Toronto, Ontario
M4N 3N1
(416) 484-4118.

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2. THEORY INTO PRACTICE

A. THE PLANNING PROCESS

i. INTRODUCTION

Once the program is established it is important to ensure that it will continue to develop in response to the needs of the community as a whole. The best way to do this is to build in an effective and ongoing planning process. A planning group made up of staff, learners, volunteers and Board members can initiate this process. Among its roles might be:

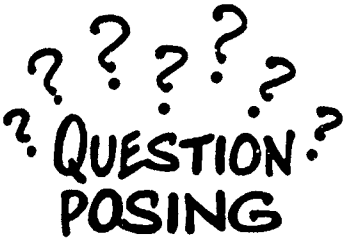
- reflecting critically on the program and its operation
- clarifying choices for the program's development
- anticipating problems
- providing inspiration and direction.

The rest of this chapter will look at ways of doing program planning as well as other aspects of the program's ongoing development. (With the permission of the Citizens Involvement Training Project, much of this chapter is indebted to *Planning For a Change* by Dale and Mitguay, listed in the bibliography.)

ii. WAYS OF PLANNING

The planning group can choose from a number of different approaches to planning. It might, for example, use an informal process of question posing. Some typical questions might be:

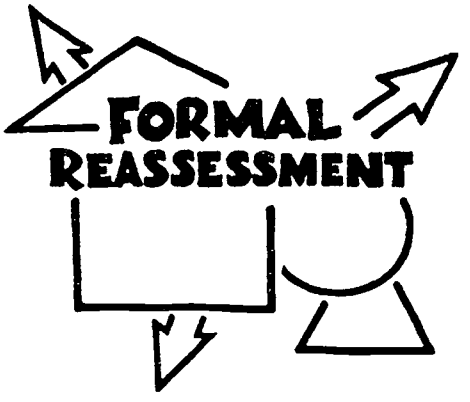
- Is the program meeting the needs of the learners?
- Is the model allowing the program to operate efficiently?
- Does the program have the materials needed for the successful operation of the model?



- Are tutors happy and involved enough? (e.g. creating their own materials; interacting well with the learners in this model).
- Do we get caught in communication crossfires or misunderstandings?
- Do tutors feel secure and competent?
- Are reporting methods efficient and effective?

- Is the coordinator personally well acquainted with each student and tutor on the program, including those on the waiting list?

These in turn will lead to more in-depth questions about the program's options.



Alternatively, the group could adopt a more systematic approach to examine new projects and directions using the following four steps:

1. Define a new project or direction by:

- re-examining the program's goals and directions
- re-examining community needs
- considering new ways to meet these needs.

2. Decide the best way that the program will work by:

- developing alternative program ideas
- assessing desirability and feasibility
- selecting the best approach.

3. Specify how the project will be implemented by developing a detailed plan including:

- staffing
- resources
- fundraising
- timelines, etc.

4. Specify how the new project or aspect of the program will be evaluated by:

- determining the criteria for success
- selecting a data-gathering process
- developing evaluation questions.

A third approach might be based on problem-solving, with an emphasis on finding innovative solutions. The problem-solving approach can be aided by using the following nine steps:

1. State the problem situation in broad terms.

2. Analyze the nature and causes of the problem.

3. Describe the ideal situation; describe the present situation.

4. State alternative versions of the problem.

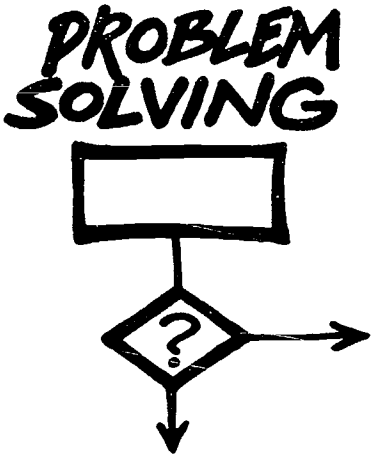
5. Choose one version of the problem to pursue.

6. Make an inventory of existing solutions.

7. Generate new solutions.

8. State guidelines for choosing solutions, and select the best one.

9. Implement and document.



Whichever planning process the group adopts, it should be consistent, sustained and ongoing, not just a one-time exercise.

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B. MODIFYING THE MISSION STATEMENT

Particularly in the early stages, the planning group may want to examine the program's mission statement and recommend modifications. Again, this can be done by posing some key questions. For example:

- How is the philosophy or aim of the program outlined in the mission statement being fulfilled by the program? If it is not, what is causing the discrepancy?
- Is your major funding criterion too restricted?
- Has something unexpected happened?
- Is there a new insight which was not originally taken into account?

If any of these conditions exist, you will need to decide whether to alter the mission statement to reflect the new reality or whether to change the program to align it to the original objectives of the mission statement.

KEY RESOURCE:

- Dale, Duane and Mitguay, Nancy, *Planning, for a Change*. Amherst, MA.: Citizen Involvement Training Project, 1978.

Topics covered:
Overview of planning, rating your group's planning process, getting started, generating program ideas, strategies, evaluation.

Available from:
Citizen Involvement Training Project
Room 138, Hasbrouk Building
Division of Continuing Education
University of Massachusetts
Amherst, MA 01003
(413)545-3450

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C. STAFF TRAINING AND DEVELOPMENT

Staff training is another important aspect of the program's ongoing development. New staff need initial training and orientation. More experienced staff require upgrading and the revitalization that a new opportunity can create while building new skills. There are several ways of providing staff training and development:

- formal training and educational opportunities – courses, workshops, seminars, conferences
- developing skills by assigning a new task, learning by experience – publishing a book of student writing; speaking at a conference or training session; designing a teaching approach for a particularly challenging learner
- staff meetings; brainstorming sessions; planning, evaluation and review sessions; learner-directed seminars and meetings.

Maintain documentation of all training activities undertaken, whether formal or informal. Build into your staff evaluation plan a place to discuss training opportunities which would be beneficial for, and of particular interest to, particular staff members.

Remember that many staff development opportunities would be excellent for volunteer tutors as well, and, at the very least, volunteers should be informed about upcoming opportunities, even if your organization cannot afford to pay the cost of the event. It is worth noting that many people offer to volunteer in order to develop skills in a new work area.

*

D. BOARD DEVELOPMENT

To function effectively over the long term, the board will need to develop ways to evaluate its performance and anticipate problems. A typical volunteer board carries out the following 8 functions and can evaluate them with some of the following questions.

1. Assessing needs:

- Does it gather information of program participants and the community at large?

2. Planning:

- Does it plan its meetings, with clear, realistic objectives and tasks?

3. Implementing:

- Do members follow through on tasks?
- Are appropriate people consulted when plans are changed?
- Are plans for meetings implemented?

4. Evaluating:

- Does the board and its committees review and analyze how well they are working?

5. Managing Relationships:

- Are people accessible to each other?
- Are committees in touch with the board?
- Are all board members and staff working together to solve problems?
- Does the board as a whole strive to resolve differences between people who are at odds?

6. Motivating:

- Do participants feel that they are suited to their roles in the organization?
- Is work being valued and recognized?
- Are decisions participatory?

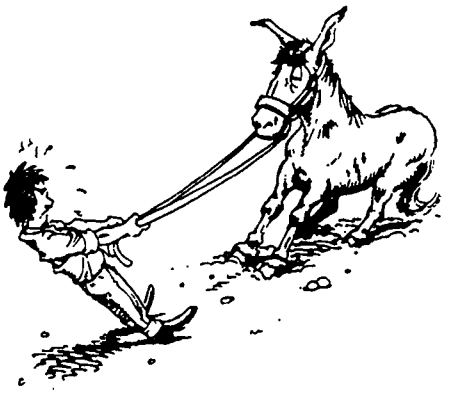
7. Providing Resources:

- Are materials on funding, job descriptions, and other information on programs available and up to date?

- Are processes for resolving conflicts, planning and reviewing performance well worked out?

8. Developing Competency:

- Is the volunteer training meeting the needs of tutors?
- Is the Board supporting the staff in its professional development?
- Do Board members have opportunities to develop their planning, fundraising, conflict management and meeting skills?



In addition to regularly "temperature taking" under these headings, the Board should be alert to the common problems which affect volunteer Boards:

- inability to attract new members
- ineffective meetings
- lack of follow-up on decisions
- strained staff-volunteer relations.

A good start in addressing these problems is Working with Volunteer Boards, from which much of the information in the section has been drawn. In some cases, an organizational development consultant can give a workshop for the board.

KEY RESOURCE:

- Ontario Ministry of Citizenship, *Working With Volunteer Boards – How to Improve their Effectiveness.* Toronto: Ontario Ministry of Citizenship, 1984.

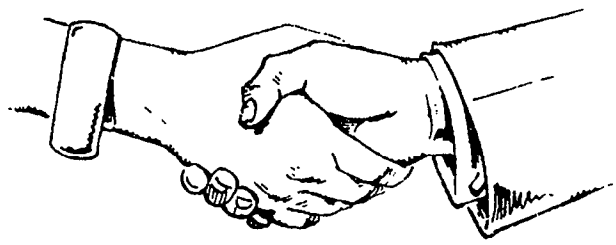
  Topics covered:
  Organizational processes, problem solving, facilitator's roles, Board/staff relations, conflicts,developmental activities for organizational development workshops.

  Available from:
  Publications Ontario
  880 Bay Street
  Toronto, Ontario
  M7A 1N8.

E. MAKING LINKS WITH THE COMMUNITY

Making links with literacy networks is an excellent way to gain new resources, knowledge, information and support. To find out if there is a network in your area, contact the Ministry of Skills Development, Literacy Branch. (For more information on networking, see Part II, Section 4.)

In addition to connecting with literacy programs, you will wish to have contacts with many individuals and organizations in your community. Often, symbiotic opportunities will arise where you can help each other out tremendously.



Examples:

- A literacy group works with a public health service to write easy-to-read materials benefitting many people in the community. In exchange, the health service promotes the literacy program to potential learners.
- A literacy group approaches a printer for assistance (low-cost) in producing materials. In exchange, the literacy group advertises the print shop in its material.
- A number of people who have approached a literacy group for tutoring all work for the same company. The literacy group is already operating at capacity. A joint proposal is prepared to launch tutoring at the workplace. The employer gains upgraded employees, increased productivity, performance and morale.
- A publisher is approached to assist a literacy group in any number of ways: through publishing material, by contributing funds and/or by promoting the issue of literacy. The publisher agrees, since she will gain positive public relations, and will be assisting future consumers of her product. The publisher clearly sees assisting the literacy group as an investment in her business and a contribution to society as a whole.

Be creative: look at the situation from the other person's point of view and determine how your program can work to their advantage.

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3. REFLECTION AND EVALUATION

A. WHY ONGOING REFLECTION AND EVALUATION IS IMPORTANT

Evaluation is an essential component of your program. Regular reflection and evaluation keeps your program on course and allows the coordinator to see if goals and objectives are being met (both short- and long-term).

Evaluation provides information on learner progress and satisfaction, which is, of course, the most important part of any program. Evaluation illuminates the strengths of your program as well as any areas requiring changes or improvements.

Regular reflection and evaluation of your program will help to ensure dynamic program planning by allowing you to recognize problems quickly and make the appropriate changes.

B. CHARACTERISTICS OF EFFECTIVE EVALUATION

Following are the criteria that evaluation planning and implementation should meet to be effective:

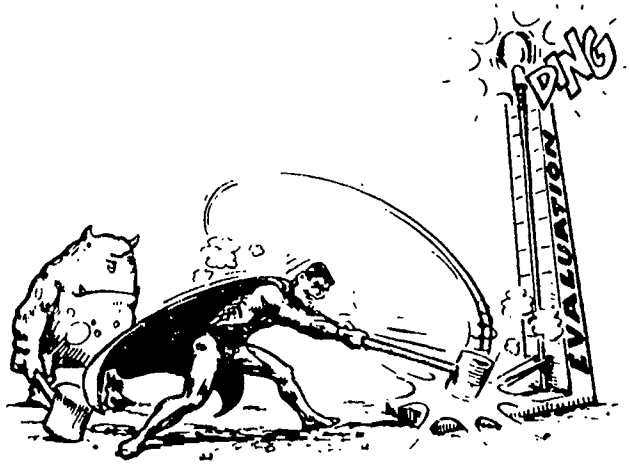
Useful - Evaluation should produce information and insight that is genuinely useful to program staff.

Practical - The methods chosen should be appropriate to the research expertise of program staff.

Collaborative - All major training partners should work together in planning and carrying out the evaluation.

Holistic - Evaluation planning should consider the full range of program services and goals.

Integrated - Evaluation of community-based programs should not be treated as something added on to program administration and delivery. It should be a natural part of program activities.



C. HOW OFTEN TO EVALUATE

i. MONTHLY

Evaluation should be ongoing, and should occur in some form once each month. These monthly evaluations can be informal, carried out through short personal interviews with staff, learners, and tutors. The data gathered should be recorded and filed.

ii. ANNUALLY

An in-depth, formal evaluation should occur annually. This may be in the form of systematic interviews, collating information on file, statistical summaries, questionnaires, or any combination of these. The utilization of consistent approaches will better enable your organization to make accurate comparisons of progress and performance over the years.

In addition to an annual evaluation, on occasion an outside, professional and objective evaluator can be useful. The evaluator is often able to pinpoint key areas of concern and make suggestions to develop a process for addressing these concerns, and can independently confirm your successes.

Whatever approaches you select, and however frequently you undertake to evaluate the program, ensure that information is written down for future reference.

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D. CHOOSING AND IMPLEMENTING AN EVALUATION MODEL

Following are some evaluation models. Depending upon your needs and the complexity of your program, you may opt for different ones, or combine elements from several.

i. FORMATIVE

On-going throughout the program year. It includes informal data collected from impromptu meetings, telephone conversations, meetings, general observations, written correspondence, etc.

ii. SUMMATIVE

Conducted at the end of each program year, using formal statistical data collected through questionnaires, planned interviews, and statistics gathered all year through staff reports, tutor reports, etc. It proceeds according to a predetermined format and answers specific questions about measures of progress.

iii. PARTICIPATORY

Involves all members of the program using their feedback as the basis of the evaluation. Participants also evaluate themselves, other staff members and the program as a whole. This format can be used with either of the above methods.

iv. EVALUATION BY OUTSIDE SOURCES

This could take two forms:

1. Use of an observer with expertise in one area, (such as group dynamics), who is called in to evaluate the functioning of the Board of Directors, for example. Thus, the observations are neutral and unbiased. As well, feedback is received from someone with specific expertise.

2. Use of an outside source to conduct an operational review to determine the efficiency and effectiveness of the overall program. Usually, this type of evaluation is not conducted until an organization is in a crisis. However, it can be an excellent preventative tool.

E. METHODS OF COLLECTING DATA

A variety of methods should be used when evaluating your program. Select those that are most appropriate, least intrusive and will focus on your specific areas of concern:

- questionnaires
- interviews
- observations
- tests
- logbook records
- program records
- participant feedback
- staff discussion.

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KEY RESOURCE:

- Anderson, Stephen E.,*Evaluation Manual for Community-Based Programs* Toronto: George Brown College, 1987.

  Topics covered:
  Purpose of evaluation, planning for evaluations, methods of collecting data, analyzing data, conclusions and recommendations.

  Available from:

  Publications Ontario
  880 Bay Street
  Toronto, Ontario
  M7A 1N8

  Ministry of Education
  Literacy Branch
  625 Church Street, 6th Floor
  Toronto, Ontario
  M4Y 2E8

F. MAKING CHANGES BASED ON RESULTS

When evaluation is complete, the results must be analyzed. From this analysis, you should determine if there are any problem areas and whether and how to address them.

Incorporate whatever you can immediately following the evaluation. For problems that take longer to solve, develop long-term strategies with short-term, interim goals.

G. LONG-TERM PLANNING

Both Board and staff must be involved in long-term planning to ensure that all key people share the same vision of the future of the program. For example, the coordinator may feel that the program will be running at the same pace, on a small, community basis, ten years from now. On the other hand, the Board may imagine the program becoming larger and more institutionalized. Obviously, these conflicting visions need to be resolved for action to be taken. Together, with a shared vision, you will be able to come up with a plan for the long-term, keeping in mind that it must be regularly reviewed and modified as circumstances change over time.

ANNOTATED BIBLIOGRAPHY

- Alberta Ministry of Education, *Further Education Services: Guide to Evaluating Literacy Projects.* Edmonton: Alberta Ministry of Education, 1984.

  A guide for the re-evaluation of a specific literacy program developed by the Alberta Government. It serves as a useful example for any literacy program, and comes complete with introductory information as well as forms and questions to be used in the evaluation.

- Anderson, Stephen E., *Evaluation for Community-Based Training Programs.* Toronto: George Brown College, 1987.

  A detailed, step-by-step guide to planning, implementing and following through on evaluation results. This material was developed specifically for community-based programs, allowing each group to develop their own questions and criteria. Some degree of follow-up is available to programs through George Brown College as evaluation is undertaken. Available from Publications Ontario, 880 Bay Street, 5th Floor, Toronto, Ontario M7A 1N8 or Ministry of Education, Literacy Branch, 625 Church Street, 6th Floor, Toronto, Ontario, M4Y 2E8.

- Ministry of Citizenship and Culture, *Working with Volunteer Boards – How to Improve Their Effectiveness.* Toronto: Ministry of Citizenship and Culture, 1984.

  A useful guide to working effectively with a volunteer Board of Directors. It is filled with useful suggestions aimed at making the organization operate more efficiently and cooperatively.

- Ministry of Citizenship and Culture, *Evaluation.* Toronto: Ministry of Citizenship and Culture, 1982.

- Ministry of Culture and Communications, *Libraries and Literacy*, Toronto: 1989. Available from Ministry of Skills Development, Literacy Branch, 625 Church St., 6th Floor, Toronto, Ontario, M4Y 2E8.

  This is intended to be a manual to assist library boards in defining ways to support literacy. It describes the rationale and response to literacy through libraries, shows model library programs and how to gather resources and funding.

- Ministry of Tourism and Recreation, *Cperational Reviews.* Toronto: Ministry of Tourism and Recreation, 1984.

  A short guide intended for the small, community-based organization. It explains what an operational review is, provides a

questionnaire designed to reveal if an organization should undertake an operational review, and explains how one should conduct the review.

- Quezada, Shelly and Soolman, Roberta, *"Establishing and Evaluating Library Literacy Programs,"* from the Journal of the Canadian Library Association.

  This is a short article based on the experience of an American Library literacy project and offers basic information on starting and evaluating library literacy projects.

- Sauvé, Virginia L., *From One Educator to Another: A Window on Participatory Education.* Edmonton: Grant MacEwan Community College, 1987.

  This is a detailed guide on the philosophy and workings of participatory education. It provides information on all aspects of a program including specific examples from practice. Available from The Consumer Education Project, Grant MacEwan Community College, Cromdale Campus, Community Education Division, 8020 - 118 Avenue, Edmonton, Alberta T5B 0R8 (403) 477-0244.

- Thomas, Audrey M., *Adult Literacy Volunteer Tutor Program Evaluation Kit. Victoria , B.C.:* Province of British Columbia, Advanced Education and Job Training, 1989.

  Practical suggestions and guidelines to lead tutors and learners through evaluation, based on a self directed learning approach. Very clear questionnaires, checklists, and forms.

- Women's Research Centre, *An Evaluation Guide for Women's Groups.* Vancouver: Women's Research Centre. Available by writing to the Centre c/o 1666 West Broadway, Vancouver, B.C. V6J 1X6 or through the Toronto Women's Bookstore.

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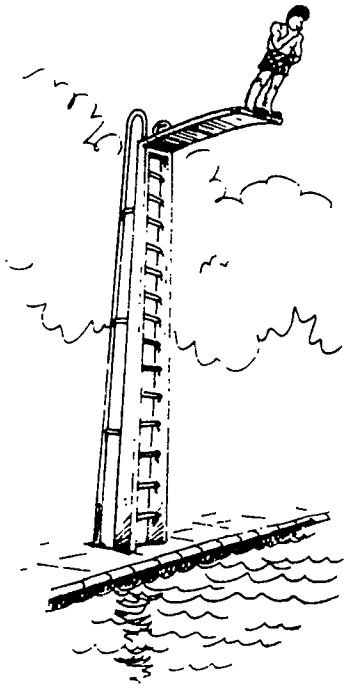
PART II

PROGRAM SKILLS

1. GETTING STARTED IN COMMUNITY LITERACY WORK



A. BACKGROUND

What background does a person need to become a community literacy worker? At present there is no formal academic certification required to work in the field. People come to the community literacy field from a wide range of backgrounds – teaching, community development, counselling, librarianship and more – any of which provide a useful starting point for learning community literacy skills. But it is generally accepted that actually doing community literacy work over a sustained period is in itself the most important qualification for the work. While this is undoubtedly true, even the most intensive program will benefit from a grounding in some theoretical principles of community education.

In this chapter, we will look at three key areas that make up a theoretical background:

- the process of reading and writing
- the social context of literacy
- the principles of adult learning.

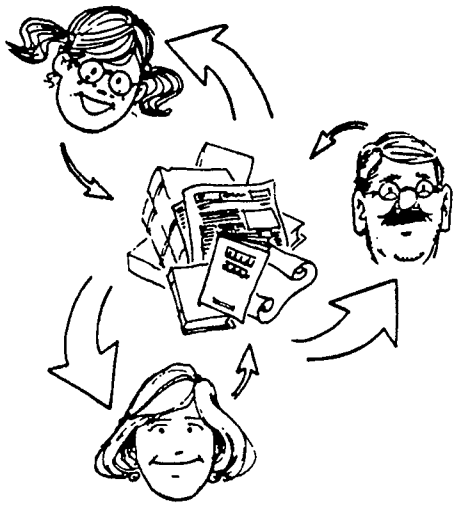
These are large topics, not to be digested in one chapter or even in a whole course. The literacy worker's understanding of them will continue to grow out of a dynamic combination of practice and reflection, in the course of his or her own work. What is presented here is meant to help start that process.

B. THE PROCESS OF READING AND WRITING

Literacy work requires a wide range of skills and knowledge. Glancing over the chapter headings of this guide will give a sense of how wide and varied this knowledge and these skills

really are. Of all of these, however, the most central is undoubtedly helping people to learn to read and write. It follows then that a literacy worker needs some understanding of the nature of reading and writing. Without this grounding his or her ability to carry out many of the other functions will be limited. Tutor training and support, the creation and evaluation of materials and instruction all require some theoretical underpinning – without it the literacy worker will be limited to following preset formulas rather than developing new approaches.

This background understanding can be practical in nature rather than purely theoretical; it might simply consist of reading some of the key texts on the subject; or it might mean becoming conversant with the major trends and schools of thought relating to reading theory.



Mary Norton, author of *Journeyworkers,* summarizes one theory of how people read and write which provides a good introduction to the subject:

- We read and write to communicate, that is, to make sense.
- Readers use their knowledge and text information to make sense of content and print.
- Writers use their knowledge to compose content and scribe print so that both make sense for their readers.

From these principles it is possible to draw further implications –"rules of thumb"– for understanding the process of reading:

- Look at the process of reading and writing as a WHOLE rather than reducing it to abstract elements relating only to their print aspect, such as letters, isolated words, syllables and phonics.
- Always try to place reading and writing in a MEANINGFUL CONTEXT rather than as insulated activities.
- Build on the learner's knowledge of specific content areas, rather than presenting unfamiliar content.
- Build on the learner's knowledge of language – as a fluent speaker of English he or she brings a vast expertise of the English language to the learning situation.
- Build on the predictive nature of the reading process in developing learning activities.

KEY RESOURCE:

- TVOntario, *Out of the Shadows: Adult Literacy, Issues and Illuminations.* Toronto: TVOntario, 1983.

Topics covered:
A variety of perspectives on literacy including the predictive basis of reading and writing and the political context and implications of literacy work.

Available from:
TVOntario Customer Service
Box 200, Station Q
Toronto, Ontario
M4T 2T1
(416) 484-2612

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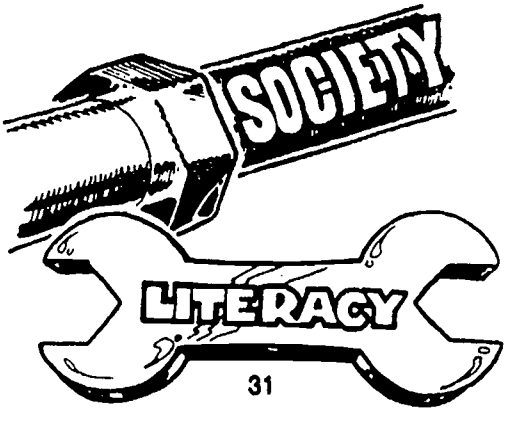
C. THE SOCIAL CONTEXT OF LITERACY

It is important to see literacy in its broader social context. Reading and writing do not exist in a vacuum. Like any other human activity they are inseparable from their social environment. An understanding of the wider social and economic implications of community literacy work is a fundamental part of the literacy worker's grounding.

Without attempting a comprehensive summary of this aspect of literacy, the following points will give a sense of key ideas:

- Literacy is a means of changing society. By empowering people to more fully participate in decisions affecting their lives, it is a tool for social change. Just as an individual is changed by becoming literate, so the community is changed by the work of a community literacy program.
- Literacy is a means of understanding the world around us and developing a critical sense of our full potential.
- Literacy is not a neutral or isolated skill that can be applied like other more technical skills. The written word, like language as whole, embodies all the values, beliefs, biases and relations of the culture it is part of. To effect positive change, literacy work must take a critical approach to reading and writing.
- Literacy as an issue is not isolated from other social and economic issues.
- Literacy is a form of cultural expression, rather than just a means of decoding and receiving knowledge.



KEY RESOURCE:

- Freire, Paulo, *The Politics of Education*. Massachusetts: Bergin and Garvey, 1985.

  Topics covered:
  Further development of Freire's philosophy of empowerment through literacy.
  Available from: Local book stores.

*

D. POPULAR EDUCATION

First developed in Latin America, Popular Education is a term describing a form of learning and teaching which is consciously directed to empowerment of learners through the learning process. Popular Education is education for social change.

The principles of Popular Education were first worked out in Brazil through the pioneering work of Paulo Freire. Freire's efforts to promote literacy among the non-literate adults of that country is now considered the practical foundation which informs the efforts of popular educators the world over. And in this view of education, the acquisition of knowledge and skills is recognized as inherently political. Knowledge is power, and if that is true, the educator has the option of choosing what the effects of the teaching process will be – to strengthen the position of those who already hold the reigns of power, or to empower those who have none. And, at a more personal level, the educators may choose whether the teaching process favours their own power over the learner, or whether it establishes the learner as an equal.

A fundamental element in Popular Education is recognition of the learner's sovereignty ove the learning process. Learning "content" and learning "process" are made to serve the interests of the learner. Learning must empower the learner to make desired changes in his or her own life. Thus, the individual who learns, does so in the awareness of what learning means to his or her own self-interest, and to the development of him or herself as a conscious and participating agent in the political, economic, cultural and social reality of the community.

Fundamental to this form of learning is the bringing to view via the learning process the concrete political, social, cultural and economic realities of the learner and the community of which he or she is a part. These are the factors which clearly situate the learner in his or her world, and which characterize also the power of relationships at a personal, communal and national level.

"Learning for social change" presupposes an understanding of economic and social realities through critical reflection on the concrete experience of the learner. Regarding literacy, the power of the written word is appropriated to the raising of personal and political awareness,

and harnessed to the struggle for social justice and personal freedom. Thus, the pedagogy which fosters this form of learning is based on the following principles:

- Learning begins with the concrete reality of the learner. It is this reality that is identified, incorporated, clarified and ultimately changed by the learner through the learning process.
- Learning is a process of empowerment. This means that in the process of learning, the learner not only assimilates new skills, information or ideas, but also acquires the capacity to apply the learning to the process of changing his or her present reality. Learning is not passive. It is an active form of engagement with the concrete conditions that, as a whole, form the reality of the learner. It is this process that transforms the learner from a passive "object" of the "teaching process" into an active "subject" in charge of his or her own learning.
- Learning entails problem posing. Critical reflection is the capacity to analyze the root conditions of one's personal and social reality and to formulate responses which can alter it. This process centres on the examination and resolution of concrete issues which directly affect the learner. Problem posing is essentially learning about oneself and one's reality through a form of dialogue which empowers the learner through critical reflection.
- Learning is holistic. All learning takes place within a given context, both personal and communal. Popular education stresses the contextual nature of learning by critically addressing the objective conditions which affect it. The issue of illiteracy is thus linked both to the factors which engender it and to the areas which are affected by it.
- Learning is integrative. Popular Education breaks down the isolation of the learner by incorporating a collective methodology in the learning process. This means that learning is a shared process among peers in small groups in an atmosphere of trust, relationship, mutual responsibility and shared critical reflection. Learning is not just the acquisition of "content" but the conscious assimilation of the learning process itself. Furthermore, the process of learning is linked not only to the concrete realities of the learner, but also to the realities, concerns and issues of the community as a whole. It is the integration of the learning context, both personally and communally, that situates the central function of literacy itself within the "total picture."

Popular Education, as an "approach," may be applied to almost any learning situation. The raising of critical awareness and the empowerment of learners need not be restricted to "academic" concerns. Literacy, however, is an issue that touches directly on the questions of power, freedom, social justice and social change outlined above. As a method, this committed, empowering process has been applied to a wide range of concerns, including women's issues, Native rights, community organizing, economic development, drama and the struggle for peace.

The heart of Popular Education is a commitment to learning as an act of freedom among peers. It is rooted in the principles of personal liberation, collective democracy, social justice, and the joy of learning as a product of dialogue among equals.

E. THE NATURE OF ADULT LEARNING

An understanding of the nature of adult learning will help provide a basis for many of the community literacy worker's activities. This applies to developing materials, designing curriculum and tutoring, as well as training volunteer tutors.

Among the principles of adult learning identified by educators are:

- Adults engage in learning to take action, to gain power over their lives. This action might involve preparing for a better job, reading to children or increasing the ability to participate in the community.
- Adults are learning every day. Whether or not adults are enrolled as students, they are constantly learning new skills in every area of their lives.
- Teaching adults (androgogy) is different from teaching children (pedagogy). Although there are some common features, key differences must be taken into consideration, including the adult's ability to take charge of his or her own learning, the adult's focus on specific learning objectives and his or her ability to draw on vast life experience.
- Different people learn in different ways. Some learning strengths or styles adults may demonstrate include discussion, apprenticeship, emulation, thinking and reflecting, following structure, and the retaining of information best through eyes, ears or actions.
- Dialogue is an important element of adult education. Learners should participate in an active process of expressing ideas and opinions and exploring possible solutions to problems and concerns.
- Problem-solving, which some educators have identified as the key method for adult education. Educator John Dewey divided the problem-solving process into a five-step action plan: awareness of the problem, analysis and imagination, evaluation of possible solutions, action and finally, reflection.

F. A LEARNER-CENTRED AND COMMUNITY-BASED APPROACH

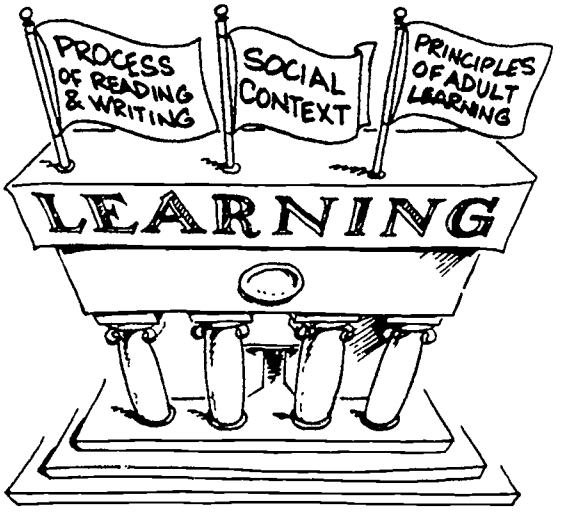
These three approaches to understanding literacy which we have now discussed – the process of reading and writing, the social context of literacy and the principles of adult learning – are not presented here as alternative perspectives on the subject but as different aspects of the whole. Only when we are able to synthesize all three into a single approach do we arrive at the idea of community-based, learner-centred literacy work. By teaching people to read and write in the actual context of their daily lives, by using the language they use, by acting collectively in the wider community and by recognizing the nature of adult learning, a literacy program defines itself as community-based.

A literacy program is community-based if it has developed in accordance with the needs of its community. Since no two communities are exactly the same, it follows that no two programs

will develop in just the same way. Each one will choose its own unique mix of methodology, curriculum, program model and setting, drawing from existing resources and examples. The following aspects of teaching adults to read and write are therefore meant to be options, to be used in whatever combination is in keeping with the philosophy and goals of each program.

Whatever the differences, however, there is one principle which all community-based programs have in common: the learner-centred approach. The basis for this kind of learning is the learner's experience, interests, culture and aspirations. The development of all methodology, curriculum and learning materials flows from this principle.

The learner-centred and community-based approaches go hand in hand. The first takes the learner as the individual starting point for learning; the second takes the community as the collective starting point for programming.



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ANNOTATED BIBLIOGRAPHY

Paulo Freire has written several fundamental books on empowering people through learning. Some titles are:

- *Education for Critical Consciousness*. New York: Continuum, 1981.
- *Pedagogy in Process: The Letters to Guinea-Bissau*. New York: Seabury Press, 1978.
- *Pedagogy of the Oppressed*. New York: Continuum, 1970.
- *The Politics of Education*. Massachusetts: Bergin and Garvey, 1985.

- Kidd, J.R., *How Adults Learn*. New York: Association Press, 1959.

A detailed study of the adult learning process. It deals with both theory and practice of adult learning and teaching. The learner's and the tutor's perspectives are both considered.

- Knowles, Malcolm S. *The Modern Practice of Adult Education: Andragogy vs Pedagogy*. New York: Association Press, 1970.

Knowles examines the distinction between teaching children and adults, and determines that effective adult learning need not resemble the learning we have done as children, but should utilize methods which provide for sharing of past experiences and the opportunity to develop and apply new learning in a participatory and realistic setting.

- Norton, Mary, *Journeyworkers*. Calgary: ACCESS NETWORK, 1988.

A very good guide for the beginning or experienced tutor, Journeyworkers stresses above all the importance of making sense. The book also stresses the importance of the learner's experience in the tutoring process.

- Sauvé Virginia L., *From One Educator to Another: A Window on Participatory Education*. Edmonton, Alberta: Grant MacEwan Community College, 1987.

This is a detailed guide on the philosophy and workings of participatory education. It provides information on all aspects of a program including specific examples from practice. Available from The Consumer Education Project, Grant MacEwan Community College, Cromdale Campus, Community Education Division, 8020 - 118 Avenue, Edmonton, Alberta T5B 0R8 (403) 477-0244.

- Shor, Ira, *Critical Teaching and Everyday Life*. Montreal: Black Rose Books, 1980.

  An important text for anyone interested in emancipatory forms of education. Explores learning through dialogue and participation, establishing critical literacy as a basis for learning.

- Smith, Frank, *Reading Without Nonsense*. New York: Teacher's College Press, 1985.

  A very readable discussion of the process of reading, based on the theory that reading must make sense to the reader. As in all of his work, the author offers an alternative to the programmed approach to reading instruction. The second edition also provides information on computers in literacy education.

- TVOntario, *Out of the Shadows: Adult Literacy, Issues and Illuminations*. Toronto: Ontario Educational Communications Authority, 1983.

  A variety of perspectives on literacy including the predictive basis of reading and writing and the political context and implications of literacy work.

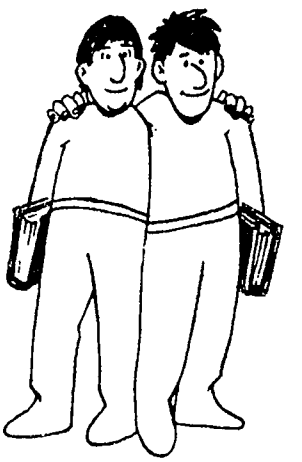
- Wallerstein, Nina, *Language and Culture in Conflict: Problem Posing in the ESL Classroom*. Reading, Mass: Addison-Wesley, 1983.

  Although specifically designed to help ESL teachers use problem posing, this resource is also useful for literacy educators.

2. TEACHING ADULTS TO READ AND WRITE

A. SETTINGS

i. ONE-TO-ONE



The one-to-one setting is currently the most common approach to literacy tutoring in community-based programs in Ontario. Its main advantages are that it:

- provides an informal learning environment
- adapts readily to a learner-centred approach, customized to the learner's priorities
- offers flexibility of time and place
- allows for an equal relationship between tutor and learner.

This approach works best when the tutor displays enthusiasm and interest, is encouraging and allows for an environment of mutual openness and honesty.

One drawback to the one-to-one approach is that because of its very individualized nature, it doesn't necessarily alleviate the learner's isolation and dependency . This can be minimized by effective monitoring of learner/tutor pairs and by staff efforts to bring learners and tutors together for informal meetings and get-togethers.

KEY RESOURCE:

- Carpenter, Tracy, *The Right to Read: Tutor's Handbook*. Toronto: Frontier College Press, 1986.

  Topics covered:
  How to get started, tutoring techniques for teaching reading, writing and math in a one-to-one setting; tutoring people with special needs, ending the tutoring relationship; overview of literacy issue.

  Available from:
  Frontier College
  35 Jackes Avenue
  Toronto, Ontario
  M4T 1E2
  (416) 923-3591.

ii. SMALL GROUPS

Small groups can be beneficial to learners because they provide a natural way to meet others in a similar learning situation. A group format can allow learners into the program sooner than waiting for one-to-one services, and can be an effective teaching tool. The peer support a group offers can motivate students and foster cooperation and good relationships. However, group leaders must ensure that the members of the group have enough in common to make group tutoring practical. The resources must be available to ensure an individualized approach within the larger group.

Programs which use a small group format tend to incorporate it as an additional model to the core one-to-one approach. When leading a group, there are some key factors to success:

- The maximum number of learners should be 5 or 6.
- Seating should be arranged to promote discussion – circular rather than the typical classroom arrangement.
- The tutor must be able to balance individual needs with the demands of the group. Co-tutoring is also a possibility with two or more tutors sharing the responsibility for the group.

- Learners must be drawn into the planning of the curriculum, determining the pace at which it is taught.
- Group leaders should be knowledgeable in group leading techniques, and have confidence in their ability to teach, coupled with the security to act upon the learners' priorities.

KEY RESOURCE:

- Adult Literacy and Basic Skills Unit (ALBSU), *Teaching Groups- A Basic Education Handbook*. London, U.K.: ALBSU, 1982.

  Topics covered:
  Ideas for group work, starting points, talking in the group, writing in groups, dealing with differences, managing the group.

  Available from:
  Adult Literacy and Basic Skills Unit
  Kingsbourne House, 229/231 High Holborn
  London WC1V 7DA

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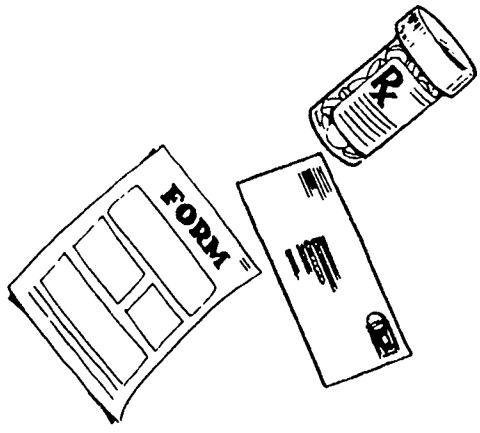
iii. DROP-INS

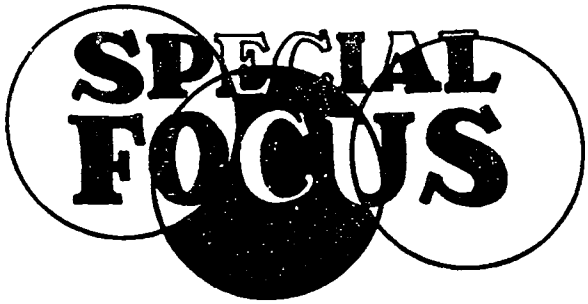
Literacy programs which develop a drop-in format wish to serve learners who have immediate needs, even crisis situations. For example, a learner may need to drop by to have a prescription label interpreted, a note from a child's teacher read, a work-related form completed. Drop-ins differ from groups in that learners are not expected to make a commitment to regular sessions, but are free to arrive and leave as desired. Drop-ins have been a trusted model for people who tend to be more transient, such as people who live on the street, people with unpredictable schedules, etc. Successful drop-ins include:



- Convenient hours and location geared to the availability and needs of learners.
- Comfortable surroundings, with a coffee pot perpetually brewing.
- Tutors capable of handling a myriad of situations and requests, from knowledge of emergency food, shelter, and other services to acting as a scribe or reader.
- Drop-ins can serve as gentle introductions to a second chance at learning in a one-to-one or small group setting.

iv. SPECIAL FOCUS GROUPS

Small groups can also form around a particular focus which all the participants have in common. The tremendous advantage here is that the group concentrates more on the particular interests, knowledge and aspirations of each person, rather than on weakness in literacy skills. Some focuses that have worked well are:



- Parent-child groups – for parents who are learners, covering various parenting topics, discussion of school-related issues, and reading to children.
- Oral history – including sharing of local folklore, shared memories of growing up in the community or comparison of diverse cultural backgrounds.
- Linked skills – where literacy is linked to the learning of skills such as photography, video, crafts or trade skills.
- Writing groups – which meet regularly to discuss their writing and perhaps to edit and produce a learner-written newsletter.
- Reading evenings – where original writing or favourite poems and stories are shared by learners with each other.

These types of small groups often involve the assistance of outside resource people and usually work best in an appropriate location – other than where the program in located. This can be done in cooperation with another agency. For example, a sole-support mothers' discussion and writing group might be set up in the context of an Ontario Housing Unit and be co-sponsored by a tenants' organization.

v. COMPUTERS IN LITERACY

Computer technology is still relatively new. Most adults who take part in literacy programs will have had little, if any, experience with computers – at least any positive experience. The new, unique and somewhat seductive computer technology often makes computers motivators to learning, in and of themselves. If handled correctly and knowledgeably, computers can be an asset to any literacy program.

Interactive computer software involves the learner actively in the learning process. And the wide variety of software available today ensures that the learner will be able to work on something meaningful in his or her life, while the information the learner will acquire can be applied directly in the real world.

In using computers, it is critical that the emphasis be placed on the learner's goals, and on the process of learning, rather than treating the learner as an input-output system. The drawback of using computers is the assumption that they will do all the work and answer all the questions. They won't, and being left alone with an incomprehensible computer and program can be a very alienating and frustrating experience for anyone.

Computers and software packages can be used for a variety of applications, including:

- word processing
- mathematics
- science
- general knowledge.

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B. CONTEXTS FOR LEARNING

i. CURRICULUM RESOURCES

In a conventional school curriculum, print materials and audio visual resources are pre-determined by the educational system or a particular teacher. The focus of the curriculum is on what the learner does not know. By contrast, the focus of a learner-centred curriculum is to help the learner build new knowledge upon a foundation of experience and previous knowledge.

Often, textbooks and workbooks can alienate their audience by their depictions of certain scenarios. For example, many adult learners come away from reading a story or viewing an illustration feeling that their lives should somehow resemble the people or scenarios presented in the book, and at the same time, that there is something wrong with how they are living their own lives. Even if such an outcome is unintentional, the message is, nevertheless, quite clear to the learner.

The primary source of material for a student-centred literacy program must be life itself, as it is lived and experienced by the learner. Thus material that is used in the curriculum should only include that which occurs naturally in the learner's day to day life. As educators, we need to be critically aware of the material that we select as material to present to our learners.

Stories – oral or written, planned or spontaneous – are an important resource for adult education. A story is a way for people to give shape to their own reality. In sharing stories, we are able to discover the world we share. Telling our stories is a way for us to validate ourselves and our lives within the context of our own experiences.

A "resource" can be a person, thing or happening which focuses and motivates us to meet our goals.

ii. USING THEMES

Themes can be built into curriculum in such a way that the objectives, concepts and skills are drawn from all areas of literacy – reading, writing, spelling and math. A variety of skills are then integrated into a general idea or theme, directing attention to a particular topic, issue or concern. While its shape can come from a tutor, it should be stressed that the theme itself – the topic of concern – must come from the learner.

There are may advantages to using themes, the greatest being that thematic teaching aids the natural integration of a variety of skills, including language – speaking, writing, listening, viewing and reading – as well as math, life and studies. The relationship between literacy and real life is reinforced, as literacy skills aid in the process of investigating, selecting and acting upon issues that affect the learner's own life.

Other advantages of a thematic approach are:

- It allows for the learner's input into determining the content of the course.
- It accommodates individual preferences and differences.
- It provides the opportunity to use a wide variety of activities, as well as different media, resources and approaches.
- It helps the program remain flexible.
- It challenges the tutor to be creative in the developing and exploring of themes.
- It exposes the learner to a wide variety of sources, such as newspapers, magazines, books, and other material related to a particular theme.

iii. LESSON PLANNING

Both learner and tutor are responsible for the content of the lesson. The tutor presents strategies for learning, but the learner must be involved in the selection of topics and materials used during lessons.

A great number of excellent resources exist to orient tutors to teaching adults to read and write, and literacy practitioners should be well acquainted with more than one in order to adequately support volunteer tutors and for direct tutoring and teaching. These will be listed at the end of this section.

Key Resource:

- British Columbia Ministry of Advanced Education and Job Training, *ABE ABL Curriculum Guide and Resource Book*. Victoria: British Columbia Ministry of Advanced Education and Job Training, 1987.

Topics covered:
Curriculum philosophy, skills objectives, methodology, assessment, course design, the processes of reading, writing and mathematics.

Available from:
Publications Services
Ministry of Education
878 Viewfield Road
Victoria, B.C., V9A 4V1
(604) 387-5331.

C. ASSESSMENT AND EVALUATION

All literacy workers have at the heart of their concerns the issue of evaluation or assessment of the effectiveness of their program as it relates to the life of the learner. Some general guidelines are addressed below.

i. INITIAL ASSESSMENT

Knowledge of the learner's starting point is vital to determining the progress made over time. Typically, the coordinator or organizer of the program attempts to determine, in a general sense, the starting point of the learner.

Because learners have usually been through an educational system in which they have not enjoyed success, any initial "assessment" which reminds them of a school environment is likely to be met with fear and resistance. For this reason, it is best to ascertain the learner's starting point through a casual discussion. Questions about the learner's comfort or skill in reading street signs, a TV guide, a magazine or newspaper, and questions about skill in writing his or her name, address, a post card, a personal or business letter will provide the coordinator with a good idea of the learner's starting point. As well, the answers to general questions about the learner's goals or reasons for enrolling at this time will provide a good sense of the learner's starting point.

The tutor, at the first session, will be able to determine the starting point more precisely.

ii. GOAL SETTING

The importance for learners to shape and determine their own goals in a program can not be over-emphasised. Learners are accustomed to educational systems where the course content has been predetermined. The strength of the community-based approach is the flexibility it affords learners who return for a second chance at upgrading their skills.

Goals should be set as a special segment of a lesson. The tutor must make the environment comfortable and casual enough to encourage the learner to articulate his or her goals, dreams and aspirations. Some goals will be long-term, others will be easy to achieve within a short time. In either event, the tutor and learner must strive together to keep work focused and directly related to the goals stated, until those goals have been met, or have changed.

Over the course of the lessons, the goals are reviewed and compared to work done and accomplishments. Ongoing evaluation is an important aspect of the program, and so these review meetings should be held regularly. When learners are ready to quit or give up, one reason may be because they have too little evidence of their progress or accomplishments. By dating work, recording the content of lesson plans, documenting time spent reading or writing each day, tape-recording the learner reading out loud and so on, the learner will have an effective way of determining the degree of progress and improvement. The best evaluation methods will be those where the learner is provided with the tools to monitor and check his or her own progress.

After each evaluation session, refine and change the goals as needed, so they more accurately reflect the ever-changing interests and priorities of the learner.

KEY RESOURCE:

- Good, Martin and Holmes, John, *How's it Going? An Alternative to Testing Students in Adult Literacy.* London, U.K.: 1978.

  Topics covered:
  A slightly more technical approach to evaluating learner progress through descriptive rather than prescriptive measures.

  Available from:
  Interprint Graphic Services Ltd.
  Half Moon Street
  Bagshot
  Surrey, England

D. LEARNING ACTIVITIES

Within the setting and context of literacy learning, particular learning strategies and activities come into play. These are the bread-and-butter of teaching someone to read and write. But these methods are not meant to stand alone: they should always be applied within the most effective setting and within the most meaningful context for the learner.

The following learning activities do not represent an exhaustive list of every possible way someone can learn to read and write. Instead they are meant to convey a range of activities from which to choose, according to the learner's interests and goals.

- **Language experience** – taking stories dictated or written by learners to use as reading material in the instruction of reading and to generate discussion and work around language and writing skills.
- **Assisted reading** – reading together aloud, with the instructor's voice fading out by the second or third reading.
- **Pre-reading** – exercises to become familiar with the way reading works, such as going left to right across the page, ability to distinguish different shapes, etc.
- **Pre-writing** – exercises to become familiar with holding a writing implement, drawing circles or spirals to music, establishing core skills related to writing.
- **Reading** – exercises related to predicting the content of a story, understanding what is on the page, ability to relate story to own experience/knowledge, etc.
- **Writing** – includes word analysis, spelling, penmanship, etc.
- **Questioning** – various types of questions are used to develop deepening understanding of the work at hand. Some questions will relate to straight recall, others will ask opinions or elicit answers which show genuine understanding of the material.

KEY RESOURCE:

- Norton, Mary, *Journeyworkers*. Calgary: ACCESS Network, 1988.

Topics covered:
This handbook describes ways to provide instruction for adults at various stages of becoming literate. Videotapes and a facilitator's guide are available with this material.

Available from:
ACCESS NETWORK
Media Resource
295 Midpark Way
S.E. Calgary, Alberta
T2X 2A8
(403) 256-1100

ANNOTATED BIBLIOGRAPHY

- Adult Literacy and Basic Skills Unit (ALBSU), *Action and Words*. London, U.K.: ALBSU, 1983.

  This pamphlet documents interested individuals launching a literacy program. It provides straightforward instruction on both the administrative and academic components of a self-help, community-based literacy group. Available from Parkdale Project Read, 1303 Queen Street West, Toronto, Ontario M6G 1L6 (416) 531-6308.

- Adult Literacy and Basic Skills Unit (ALBSU), *Teaching Groups*. London, U.K.: ALBSU, 1982.

  An introductory guide to teaching small groups with specific emphasis on adult literacy groups. It offers an outline of a specific model of an adult literacy group. It also provides examples from actual literacy and basic skill classes.

- Adult Literacy and Basic Skills Unit (ALBSU), *An Introduction to Literacy Teaching*. London, U.K.: ALBSU, 1980.

  This short book opens with general remarks regarding adult literacy and proceeds to offer numerous methods of literacy instruction. It concludes with suggestions for evaluating the tutors, the program and the learners.

- Baker, Alan and Brown, Joyce, *Tutor Training Manual*. North York: North York Public Library Literacy Program, 1988.

  A general guide to tutoring adults which describes language experience, sight-word and phonics approaches with summaries of the teaching philosophies and methods used. Available from the North York Public Library Literacy Program, 5120 Yonge Street, North York, Ontario M2N 5N9 (416) 395-5555.

- Bernstein, Judith, *People, Words & Change: Literacy Handbook*. Ottawa: People, Words & Change, 1980 (revised and updated January, 1987).

  Designed to help answer some of the questions of the literacy volunteers involved in the People, Words & Change adult literacy project. This book responds to the common need for centralized materials, book lists and resource information. The book begins with a section on volunteer preparation, and goes on to explore instruction techniques for reading and writing, lesson planning, the nature of literacy skills, development of curriculum and a commentary on materials available.

- Cameron, Joyce and Rabinowitz, Myrna, *A Guide for Tutoring Adult Literacy Students*. Victoria: British Columbia Ministry of Advanced Education and Job Training, 1988.

  A general guide to using the language experience method in teaching adults to read and write. It includes some checklists for learners to ask themselves and is intended to improve goal-setting, learning and retention. Available from Ministry of Advanced Education and Job Training, Provincial Curriculum Publications, c/o Open Learning Agency, Order Desk, P.O. Box 94000, Richmond, B.C. V6Y 2A2 (604) 660-2190.

- Carpenter, Tracy, *The Right to Read: A Tutor's Handbook*. Toronto: Frontier College Press, 1986.

  This handbook offers an introduction to the Student Centred Individualized Learning (SCIL) approach to teaching adult literacy. It offers a complete guide for the tutors on using a SCIL approach to instruct adults in reading, writing and math. Fully illustrated, it is documented with real situations and examples. Available from Frontier College, 35 Jackes Avenue, Toronto, Ontario M4T 1E2 (416) 923-3591.

- Good, Martin and Holmes, John, *How's It Going?* London, U.K.: ALBSU, 1979.

  This short guide outlines an alternative to standardized testing in adult literacy programs. It outlines a basis of evaluation which employs charts for recording student progress.

- MacFarlane, Tom, *Helping Adults to Read*. London, U.K.: MacMillan Education Ltd., 1979.

  A short guide for the adult literacy tutor offering information on texts and activities valuable in the teaching program.

- Norton Mary, *Journeyworkers*. Calgary: ACCESS Network, 1988.

  This handbook describes ways to provide instruction for adults at various stages of becoming literate. Videotapes and a facilitator's guide are available with this material. Available from: ACCESS NETWORK, Media Resource, 295 Midpark Way, S.E. Calgary, Alberta T2X 2A8 (403) 256-1100.

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3. WORKING WITH VOLUNTEERS

A. VOLUNTEERS

i. VOLUNTEERS IN LITERACY

In Ontario, most of the Anglophone, non-Native community-based programs work with volunteer tutors. Among the implications of this approach are:

- Program staff will spend a significant amount of time on volunteer coordination.
- A limited number of tutoring hours will be available to learners.

One way to put these implications in perspective is to think of volunteers as more than purely volunteers. Instead of being seen in the traditional role of someone who is donating services to the "less fortunate," the volunteer should be seen as a citizen who is getting involved in his or her community to work on a particular issue.

Given this shift in perspective, volunteers can be seen as valuable resources who bring a number of valuable elements to the program, including:

- a sense of community "ownership"
- home-grown knowledge vs exclusive "expertise"
- links with other community organizations
- fresh energy and insights and ideas about literacy, particularly from new tutors beginning the program.

ii. VOLUNTEERS AND THE PROGRAM

There are a number of different stages in the involvement of volunteers in a program:

- intake
- interview
- orientation
- training
- ongoing support.

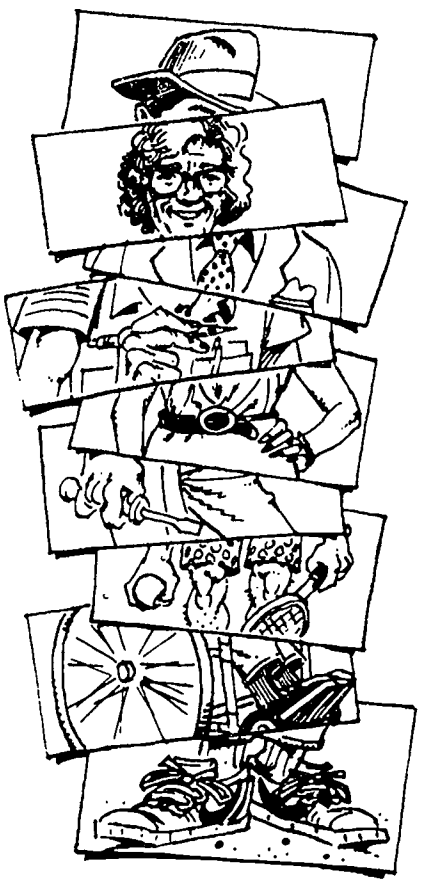
In many cases the sequence follows this order, with orientation forming the first session of the training. Some programs, however, have regular "orientation evenings," where tutors and students are present to describe the program and answer questions. If this is then followed by the interview, it gives volunteers more time and information before they decide whether or

not to commit themselves to several evenings of training. It also gives the staff a better chance to assess the potential of the volunteers.

KEY ORGANIZATION:

Volunteer Ontario: The Centre For Volunteerism.
111 Merton Street
Suite 207
Toronto, Ontario
M4S 3A7
(416) 487-6139.

B. OUTREACH METHODS



The general profile of the tutors involved with a literacy program should reflect the principles and constituency of the program. All organizers desire tutors who not only have skills and competence in assisting a learner through a reading and writing program, but who can relate well to the learners in a way that preserves the learner's dignity and respects the learner's experience.

Before actively seeking tutors, it is important to give some thought about who you wish to draw to your program, and to select people who will fill your desired tutor profile. Abandon notions that there is only one "type" of person who would offer services as a tutor – there are many, many people who are keenly aware of and sensitive to the issue of literacy who are eager to be invited to participate in a meaningful way.

Generally, the most active tutors will be found through:

- the program itself – many learners go on to become tutors themselves
- community newspapers
- word of mouth
- friendships and alliances with staff, tutors and learners
- speaking engagements with selected groups
- volunteer centres.

No matter how anxious your organization may be to find tutors, stay selective. You owe it to the learners on your program to pull in the most confident, creative, skilled, versatile, flexible and aware tutors you can find. These marvelous people will ultimately reflect your program, your learners and your own ability to organize a quality program.

A general public service announcement, a newspaper article focusing on any aspect of your program – such as learner or tutor profiles – or a special event will do wonders to increase your visibility in the community. Yet increased visibility will not necessarily draw the kind of tutor you seek. These publicity activities should be planned carefully, so that there is time to speak with the many people who will be interested enough to call. You will need the time to outline the nature of your program in greater detail, to be selective, and to redirect people to other programs if necessary.

In any outreach strategy for tutors, stress the need for commitment to the program. Clearly define the program and the expectations of tutors. Don't be discouraged if tutors decide to leave your program for any reason – it will make your program stronger in the long run.

Tutors can be sought through the same methods as learners; however, written ads and posters can be more descriptive. Whenever you seek out tutors, you will also draw students and vice versa, but you can tilt the balance through selective advertising to address the needs of your program over time.

Once tutors begin to call or drop by, make sure your time has been planned so that you are available to meet with them personally. Interviews should be relaxed and informal to allow you to get to know the person as well as possible. This will be tremendously important as you attempt to match tutors to students you have met. Offer some hypothetical situations to gather a sense of how a tutor might interact with a new student in a crisis, or with a difficult or awkward situation. If you have a feeling that the tutor is not suitable for the program – don't allow the person to tutor! No matter how desperately you need tutors, your intuition can save you many problems down the road.

Over time, you will develop a tutor profile or mental check list of skills and abilities which are helpful for the learners on your program. Balance this as you conduct interviews. Sometimes you will meet a tutor who is enthusiastic, but who, you might feel, would have trouble tutoring because of his or her personality, skill level, attitude, lack of confidence or creativity, etc. Remember that there are several ways people can assist in the program, and only one of those way is in direct tutoring. Volunteers may also be helpful in organizing special events, fundraising endeavors, newsletter production, mailings to participants, sewing curtains for the office, etc. The creative organizer will be able to divert candidates away from tutoring, if necessary, and successfully into other activities related to the program in a way that will leave them feeling good about the program and themselves.

KEY RESOURCE:

- Vineyard, Sue, *Marketing Magic for Volunteer Programs*. Downers Grove, Ill.: Heritage Arts, 1984.

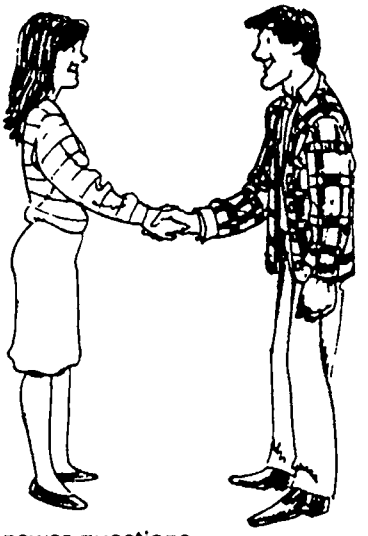
  Topics Covered:
  The basics and importance of marketing for volunteer groups, making connections, identifying and understanding trends, management, fundraising, plain English, dealing with the media, and a number of other related topics.

  Available from:
  Heritage Arts Publishing
  1807 Prairie Avenue
  Downers Grove, Illinois 60515
  (312) 964-1194.

C. INTERVIEWING AND SCREENING

When someone applies to volunteer as a tutor, there should be a standard intake process. This might include:

- A brief description of the program (or descriptive flyer if available).
- Information about the interview, training and screening process, making it clear that everyone who volunteers is not automatically accepted as a tutor.
- Filling out an intake form (name, address, work experience, volunteer experience, interests and general questions about why he/she wishes to be a literacy tutor.
- An initial assessment by a member of the staff.



i. INTERVIEW

The interviewing techniques you select will depend upon your operating style and the type of person you are trying to draw into your program. Whether interviewing potential learners or tutors, certain guidelines can be followed:

- Attempt to get personal, face-to-face interviews rather than phone interviews.
- Explain the program, its goals, the expectations you have, and offer to answer questions.
- Gather the basic information you require which will range from goals and interests to phone number and address. All this information will be beneficial at the matching stage.

- Be straightforward about what your program is and what it is not. By doing so, you encourage inappropriate tutors or learners to opt out voluntarily. Obviously, your program can not be all things to all people.
- Know the information you want to learn by the end of the interview.
- Plan a variety of questions which will help you gather this information.
- Begin by setting a warm and inviting atmosphere. Offer a beverage, a comfortable place to sit, and chat briefly about a neutral subject.
- Ensure that the seating is conducive to open discussion. Do not interview someone if he or she is seated across a desk from you.
- Be perceptive and attentive. If the person you are interviewing shows you a resume or other documentation, take the time to look it over, and make pertinent comments about it.
- Invite the person to ask questions that will clarify the type of response you require.
- A clear and direct question will probably lead to a clear and direct answer. Avoid posing questions where the desired answer is obvious, e.g. "Are you prejudiced against new Canadians?"

Allow the person to let his or her personality show through by setting a relaxed atmosphere, by posing hypothetical situations related to the program, by discussing interests and hobbies.

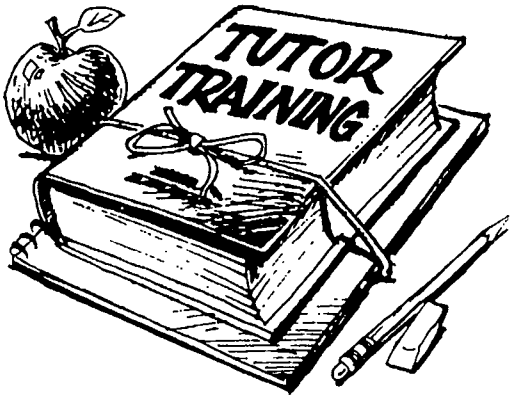
The interviewer should evaluate the interview immediately after it is completed, either using an evaluation checklist or discussing the interview with another staff member.

ii. ACCEPTING OR REFERRING

When the volunteer is accepted into the program, it may be useful to have a reciprocal agreement or "contract" which outlines the responsibilities of the volunteer to the program and vice versa. If the applicant is found to be unsuitable it is important to offer clear reasons and to give alternatives for working in the community. Rather than presenting this simply as a rejection, the interview can offer helpful feedback and alternatives.

D. TRAINING

Tutor training is a key element to the success of the program. The quality of tutoring, the application of the program's philosophy, the development of a sense of community among participants – all of these aspects of the program depend on the quality of tutor training.



Being able to meet this challenge is an essential part of community literacy work. An activity which is so essential to the program's operation must be done by the program's own staff, if it is to be community-based.

The skills and knowledge required for training tutors are available from a number of sources:

- MSD sponsored workshops
- Laubach literacy training of trainers workshops
- Journeyworkers video series and other A/V
- workshops on volunteer training
- other programs' training.

Finally, it is by doing training that the literacy worker becomes a good trainer.

In general, community-based tutor training is:

- **Participatory** – It draws on the experience, knowledge and skills of the tutors, posing questions rather than relying on ready-made answers.
- **Community-oriented** – It gives tutors a clear sense of how the program relates to the community.
- **Relevant** – It presents effective methodology.
- **Flexible** – The sessions can be adapted to suit different circumstances.

Just as every community-based program is different, reflecting the needs of its community, so each tutor-training will be different, reflecting the nature of the program. Given this uniqueness, there are some typical subjects covered in training, including:

- welcome
- overview of literacy issue (statistics)
- introduction to the program/organization
- sensitization to the learner's experience
- philosophy

- teaching theory (Reading, Writing, Math)
- sample teaching techniques
- monitoring progress (evaluation)
- reporting expectations (to co-ordinators)
- schedule of follow-up events, eraining
- other areas of involvement (newsletters, board of directors, learner certificate ceremonies, etc.)
- a warm wish for success

Some general guidelines for training:

Generate a warm atmosphere: have light refreshments available, music playing while guests are assembling, individualized packets of information and writing materials available.

- Training sessions for groups should be limited to about fifteen, so that participants will be able to participate. Remember that it is important for you to invite the participation of tutors.
- Allow for breaks if you conduct lengthy training sessions.
- Ensure your training style and schedule allow for flexibility, just as you would wish your tutors to be flexible in their sessions, according to the priorities and needs of their learners.
- Invite outside experts to deliver part(s) of the training.
- Include the invaluable contribution both learners and tutors can provide.
- Notify participants well in advance that a training session is planned.

KEY RESOURCE:

- Duane, Dale Magnani, David and Miller, Robin, *Beyond Experts, A Guide For Citizen Group Training*.Amherst, M.A.: The Citizen Involvement Training Project, 1979.

  Topics covered:
  The nature and dynamics of citizen group training, how to focus on different skills and activities to make your group as effective as possible, what it is to be an educator, perspectives on the

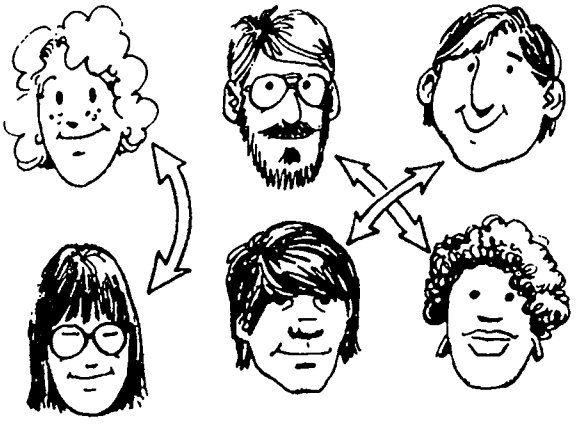
educational system, getting started, training tutors, assessment of needs, learning objectives, and resources.

Available from:
Citizen Involvement Training Project
138 Hasbrouck
University of Massachusetts
Amherst MA 01003
(413) 545-2038.

E. MATCHING

Once you have completed preliminary interviews with tutors and learners, and tutors have successfully completed a training session for your program, you are ready to think about matching. Although it may be possible to pre-select matches to some extent, it is best to wait until the tutor has finished the training session(s). Some tutors may opt out of the program once they are aware of the degree of commitment and intense involvement required. Some may have difficulty attending all parts of the training which might be an indication of an inability to fulfill an obligation to tutor a learner. Some may have made inappropriate or insensitive remarks which your instincts tell you will be disastrous in a tutoring situation. For all these reasons, wait until the tutor has gone through training to do your match.

Items to consider when matching:



- Distance between tutor and learner – The match is likely to crumble if too much travel time is involved. Establish each person's limitations in terms of time and type of travel if possible.
- Basic personalities – Sometimes an outgoing, gregarious tutor can bring out the best in a shy, quiet learner; sometimes it can be disastrous if the learner becomes vulnerable to a domineering tutor. Make your best decision based upon your knowledge of people.
- Time availability – Ensure the tutor and learner are free at the same times so that sessions are actually possible.
- Skill areas and interests – Some of the best tutor/learner relationships evolve when it is possible to establish a common interest in anything from music to travel, from cars to kids. Make sure the tutor feels comfortable working at the learner's level: some tutors wish to work with someone who is just beginning to read and write; others prefer to work with a person fine-tuning their writing, organizational or spelling skills. Take advantage of a tutor's skills to make the best match possible.

- **Individual preferences** – Occasionally, a learner or tutor may specify a choice of working with someone of the same sex, or in an older, younger or similar age bracket. Attempt to determine the reason for the preference, and, if the reason is sound, do whatever is possible to accommodate the preference.

Of course, you will not usually be able to satisfy all criteria when matching a tutor and learner, and other factors may interfere. Use your best judgement in weighing the various considerations. If a match doesn't work out, make a sensible change as soon as possible, and spend a bit of time preparing learners and tutors for the possibility of being rematched if they have difficulties at the outset, for whatever reason. While the "loophole" makes both participants feel more secure, most coordinators will find that the first matching attempt tends to be successful, and, with experience, fewer and fewer rematches are needed.

In evaluating the matches, make sure you ask questions about how people are getting along. Talk to learners personally as often as possible, and encourage learners to speak to one another. Often, a learner will feel more comfortable being candid with another learner than with the coordinator, to whom the learner may feel some indebtedness or gratitude. These feelings, however natural, do inhibit open or honest communication, especially if it is about criticisms of the program and/or the tutor.

F. ONGOING SUPPORT AND COUNSELLING

i. ONGOING SUPPORT

There are several ways of offering both tutors and learners the support they will need. Conscientious organizers should be in contact with all tutors and learners at least once each month to determine the success and progress of the sessions, to obtain any documentation which may be required for funders or for personal evaluation purposes, to alert tutors and learners to upcoming events, and to offer suggestions as needed.

Plan social events and regular information-sharing sessions open to learners and tutors alike. Events may include annual (or semi-annual) Certificate Ceremonies acknowledging the number of months learners and tutors have participated in the program; parties to mark

seasonal celebrations; attention to World Literacy Day on September 8 each year – even film nights.

Information-sharing sessions may be a round-table discussion with guest speakers, perhaps involving practical exchanges of teaching techniques on a predetermined theme – for example, ideas for teaching spelling or for adapting everyday materials to easy-to-read materials for tutoring sessions.

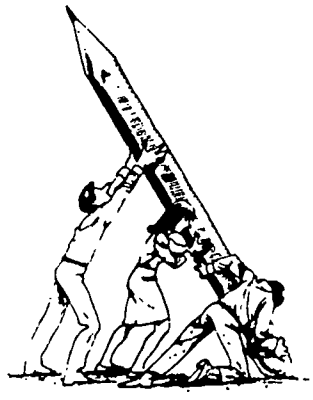
Just exactly what to offer and when to offer it will usually be determined as a result of your ongoing contacts with learners and tutors. Themes will undoubtedly arise as you speak with people involved in your program, and these can be developed into an information-sharing session. Alternatively, the ongoing contacts will allow you to check out ideas for certain sessions, determine the level of interest, and target those people you feel would most benefit from such a session.

ii. CRISIS COUNSELLING - INTERVENTION AND REFERRAL

Counselling

Depending upon the orientation of each organizer, the emphasis and focus of counselling will vary. Generally, a literacy program is not a counselling program, and a well-meaning organizer can quickly find him or herself embroiled in difficult situations without the skills or tools necessary to resolve them. At these times, people are best referred to counselling centres.

An excellent way of offering "counselling" in these situations is to organize "rap sessions," "drop-in" times or peer support networks or meetings around a given topic. Allow people to assist each other, particularly where there are common experiences and people available with experience to share.



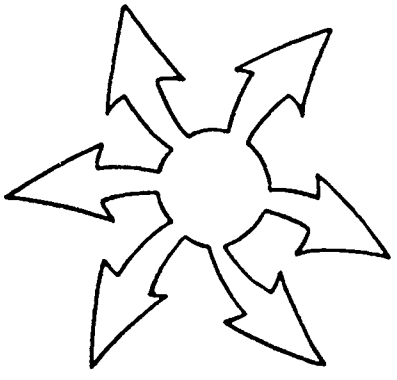
However, much "counselling" is really advising or peer support, and many avenues are open to an organizer. The first caution is to maintain a balance which will allow activities directly related to literacy instruction to occupy the majority of the organizer's time.

Intervention

Unlike counselling, intervention usually entails a crisis. Many literacy coordinators would be best advised to make a recommendation or referral to an agency equipped to deal with such emergencies (rape crisis centres, emergency wards, police). If you are not really sure of yourself, you are probably safest and offering the best support by connecting the person in crisis to a competent crisis professional.

The emotional involvement can make it difficult to maintain your perspective. If you do get involved in someone else's personal problems, keep in mind that because it is a crisis situation, it will end, eventually.

Referrals



Organizers will quickly discover other agencies and services operating in the neighbourhood, or will soon have cause to investigate them. In an informal way, then, individuals may be referred to potential shelter/housing, social services, medical facilities, and information centres. Sometimes, a number of people may have similar concerns around raising children as single parents, learning to drive, or coping with life outside of an institutional setting.

When making a referral, do so as sensitively and tactfully as possible. Explain what that agency may or may not be able to do and how long a person can expect to wait or be "on hold." As you get to know your community connections, you can make referrals to agencies and individuals whom you know and trust.

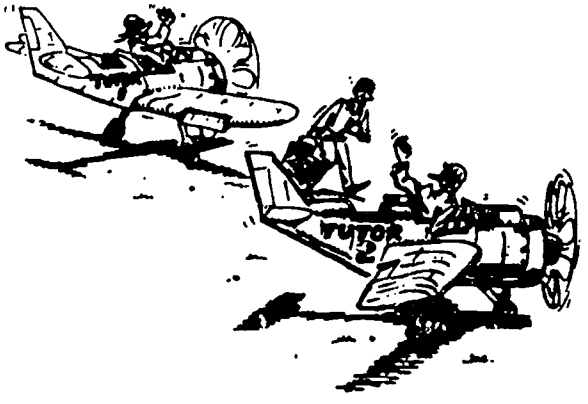
G. CLOSURE

Programs will generally request a six-month time commitment from a volunteer tutor and learner, although some successfully obtain a one-year commitment from participants. The length of time people commit themselves to your program will have implications upon other dynamics besides ending the sessions. A short commitment is cut shorter by lengthy training periods. Evaluation methods will differ according to the degree of intensity and involvement tutor/learner pairs enjoy.

As part of the evaluation process, which will be discussed later, it is important for learners to develop goals with tutors, and for a consolidated effort to be made on the part of the learner, tutor and organizer to ensure the goals are attained. So, for example, within a six-month time frame, certain specific goals should be targeted. This creates a positive note upon which to end.

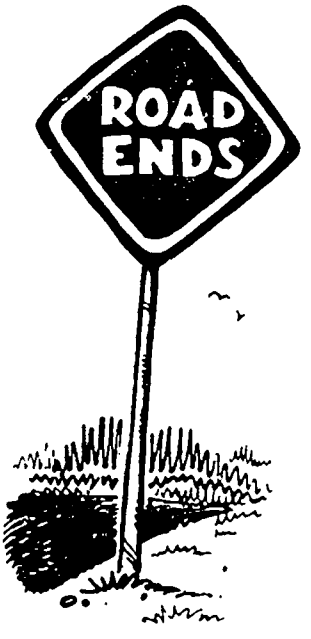
Often, however, both parties do not wish to end at the same time. A learner may continue a program, but with a different tutor; or a tutor may take on a new learner if the first person moves on, satisfied with the progress made to date. The extent to which a program allows for flexibility around matching, rematching, or renewing people on the program will depend upon the energy, versatility (and resilience!) of the coordinator, as well as the community demand for the program.

Yet another scenario may present itself: that of the tutor and learner equally willing to



continue beyond the initial six-month (or one year) commitment. In this situation, it is advisable to realign the goals over a specific time frame, whether it is one more month, one more season, or one more year, so that an ending will occur when a goal is reached.

When anticipating a natural end to a tutoring relationship, everyone should be honest with each other. Tutors should remind learners of the time remaining before the end of the commitment; individuals should feel free to express when it is time to move on. In fact, in long-term matches of one and a half to two years, it can be rejuvenating to rematch learners and tutors to others to elicit fresh ideas, approaches and rekindle motivation. If rematching is done for this reason, the organizer must be sure both parties desire such a change, and that the desire for change is interpreted as positively as possible in the event that only one person wishes to discontinue.



The final meeting between a tutor and learner should be positive and optimistic. Some pairs elect to celebrate over

dinner or a show. Many, many times the two remain friends. Sometimes, long after a learner has discontinued active tutoring sessions, contact remains with the relationship changing from tutor/learner to mentor/friend. There is every reason for the final sessions to be happy occasions – celebrations of achieved goals and increased skill.

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ANNOTATED BIBLIOGRAPHY

- Adult Literacy and Basic Skills Unit (ALBSU), *Training in Adult Literacy and Basic Skills*. London, U.K.: ALBSU, 1985.

  This short guide provides the organizer of a literacy program with information on the training of tutors. It offers information on why, when and how to train tutors, as well as suggestions on evaluation of a learner's progress.

- Carpenter, Tracy, *The Right to Read: A Tutor's Handbook*. Toronto: Frontier College, 1986.

  This handbook offers an introduction to the Student Centred Individualized Learning (SCIL) approach to teaching adult literacy. It offers a complete guide for the tutors on using a SCIL approach to instruct adults in reading, writing and math. Fully illustrated, it is documented with real situations and examples. Available from Frontier College, 35 Jackes Avenue, Toronto, Ontario M4T 1E2 (416) 923-3591.

- Norton, Mary, *Journeyworkers Facilitator's Guide*. Calgary: ACCESS Network, 1988.

  A companion to the Tutor's Handbook noted above, this book provides extra information for people in charge of operating programs. Available from ACCESS Network, Program Sales, 295 Midpark Way, S.E., Calgary, Alberta, T2X 2A8. (403)256-1100.

- Pratt, Sidney, *"Making it Happen: Volunteers in Literacy"* from *Out of the Shadows*. Toronto: Ontario Educational Communications Authority, 1983.

  This short article discusses the need for and use of volunteers in the literacy programs. The article also offers suggestions on how to select and train literacy volunteers.

- Webber, Marlene, *The Right to Read: Organizer's Guide*. Toronto: Frontier College Press, 1983.

This instruction manual offers the prospective organizer a guide to organizing a program consistent with a student-centred approach. It provides concise information on Frontier College's SCIL (Student Centred, Individualized Learning) approach to teaching, recruitment of volunteers, outreach to learners, tutor training, program publicity and fundraising. Available from Frontier College, 35 Jackes Avenue, Toronto, Ontario M4T 1E2 (416) 923-3591.

KEY ADDRESS:

- Volunteer Ontario: The Centre For Volunteerism
  111 Merton Street, Suite 207
  Toronto, Ontario
  M4S 3A7
  (416) 487-6139.

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4. WORKING WITH LEARNERS

A. A PARTICIPATORY APPROACH

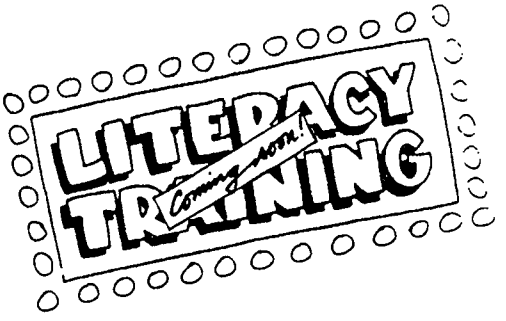
In community-based literacy work, learners are involved at every step. Thus, every chapter of this guide assumes the participation of learners – from program development to planning and evaluation to tutor training and development of materials. The purpose of this chapter is not to isolate learner participation under a separate heading, but to touch on some aspects of it which have not been covered in other chapters.

B. OUTREACH

The strategies used to inform and invite learners to participate in your program will vary according to the local situation. It is important to assess the community needs, identify the target groups and advertise in areas where learners are found and in ways that are easily accessible.

Generally, organizers will already have familiarity with the community where a literacy program is planned or in place, and this information is vital. Additional information about the needs of the potential learner and the likelihood of success with a given response can be gained by speaking to potential learners and people who have experience with community members who have difficulty reading and writing.

With information gained from such informal interviews and personal perceptions, it is possible to determine the elements of a literacy program which will contribute to its success. For example, will learners be more likely to become involved if day care is available? If learning is one-to-one? In small groups? Are learners more likely to become involved if the program operates from a central location? Or if learning takes place at home and in the community? Will learner involvement be increased if a drop-in or structured format is offered? As these questions are answered and program elements built, a profile of the "type" of learner you will serve emerges. Now, you are ready to think about where and how to advertise.



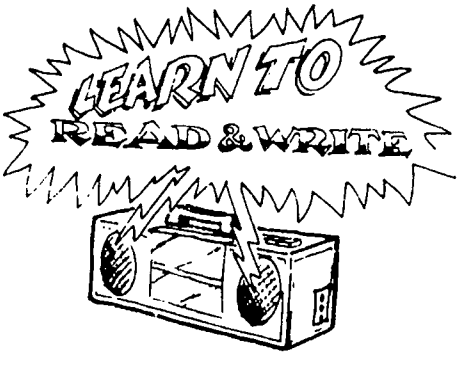
On a map of the neighbourhood, town or region, highlight areas where the potential learners may be found. Advertisements promoting the program should therefore be in those areas – in shopping malls, in grocery stores, on bulletin boards, on lamp posts, in community papers, in radio announcements, etc.

There are several ways to advertise:

1. **Word of mouth** – The best method of pulling in appropriate learners to your program is the recommendation of someone who has been happy being a part of it. As time progresses, this becomes the most frequent method used to alert potential participants of the program.

2. **Radio/TV ads** – Make use of community service time for announcements. Stations make varying amounts of time available for public service announcements of non-profit organizations. Competition for this time is fierce, so try to establish a rapport with a key person at the station and be sure to send your notice in early. (A gift of a book on a popular topic with a note, "If you're glad you can read this, help us reach others!" attached to your announcement may just be the special highlight needed to get your message on the air.) Keep your message brief and clear, and describe the program in positive terms. For example, the program helps you "learn to read and write" vs the program helps "illiterates." Remember that this kind of advertising reaches a large number and wide range of people, and so will require a large time investment to handle inquiries, conduct interviews, screen for appropriate learners and refer elsewhere as needed. The Ministry of Education has prepared Public Service Announcements which can be ordered and tailored to promote local literacy programs.

3. **Newspaper advertisements** – May be useful to pull learners in to the program if they are kept brief, written in straightforward language and have a prominent phone number included. Alternatively, friends and relatives of potential



learners may notice the advertisement and relay the information.

4. **Flyers and posters** – Once again, keep the wording very brief and clear, and include a phone number prominently on the page. Use illustrations representative of the flavour of the learning situation or depicting the types of activities made possible for learners as a result of becoming involved with the program.

5. **Agency referrals** – Once you are established and you have a clear idea of who you serve, alert agencies to your program. Try to discourage an agency from making a referral without a participant's informed consent. Meet the person referred as soon as possible to confirm information and to decide, together, if the program is in the best interest of the individual at this time.

6. **The Public** – Use the media to draw the attention of the public to your program through a newspaper article, a television interview or a spot on radio or TV. You may have to generate "news" to do this effectively by announcing the opening of your program, covering a special event (such as Certificate Ceremonies), inviting a celebrity to read poetry at a gathering, co-sponsoring a visible event in honour of literacy (for example, a Read-A-Thon in conjunction with a local school).

Spare no one. Talk about the work you do to friends, family, strangers at bus stops, your dentist or lawyer. Carry brochures around and leave them with people you meet. Sharpen your ability to use few words to give a crystal clear picture of what you are doing. Remember personal anecdotes that vividly demonstrate the impact of the program without betraying anyone's confidentiality or privacy.

The way you treat learners in the program will contribute to your public image, as will your handling of tutors. Do all participants feel included, well supported and involved? Do tutors feel needed and competent? Would they recommend the program to others? The best way to ensure a good public image and profile for literacy work is to ensure all is well in the backyard of your own program.

C. INITIAL INTERVIEW

For many learners, the initial contact with the program will decide his or her involvement in it, or in any other program for that matter. Often, years of negative educational experiences make it very difficult to take the step of approaching a literacy program. It is essential therefore that the initial contact be a positive one. To make it as positive and as pleasant as possible, staff should:

- be friendly and welcoming
- listen
- give a clear sense of how the program works
- arrange an interview as soon as possible, ideally right away.

The interview format itself will vary considerably from program to program. In any case, it should be:

- consistent for all interviews, but open-ended enough to allow for different interviewer's styles
- relaxed – the time and place should suit the prospective learner as much as possible.

The amount of information gained from the interview will also vary from program to program.

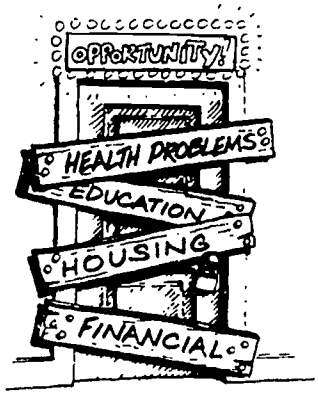
Some will consider the interview a very informal meeting and leave information on past education and assessment for the tutor and learner to talk about in their first sessions. Others will include this information with a view to preparing the tutor beforehand.

Some typical questions might concern:

- past schooling
- interests
- reasons for coming to the program
- preferred location of tutoring
- preferred time of tutoring
- if groups are offered, preferred time.

D. ADVOCACY AND REFERRAL

Literacy is not an isolated issue. For literacy learners, education is only one of a number of barriers or problems they may be facing. Others may be domestic, legal, financial, or in areas such as housing, immigration, and health problems. The learner can hardly check these at the door of the program and focus exclusively on reading and writing. Program staff and tutors may be called on to help with these problems. It is important to establish that a literacy program cannot take on the functions of other social service agencies. However, it is a key part of a program mandate to direct learners to appropriate services and, through using reading and writing, to make them aware of their rights. In order to do this, the program staff must:



- Develop contacts with agencies, organizations and government offices in the community.

- Be knowledgeable about income support programs at all levels of government, as well as other services in the community.
- Know where to get information and counselling in the community.
- Have the above information well organized and accessible.

KEY RESOURCE:

- Ministry of Citizenship and Culture, *Guide for Settlement Service Workers*. Toronto: Ministry of Citizenship and Culture, 1987.

  Topics covered:
  The structure and operation of Government, developing contacts and relationships, requesting information and services, sources of information and assistance, organizing and managing information, and social advocacy.

  Available from:
  Publications Ontario
  880 Bay Street
  Toronto, Ontario
  M7A 1N8

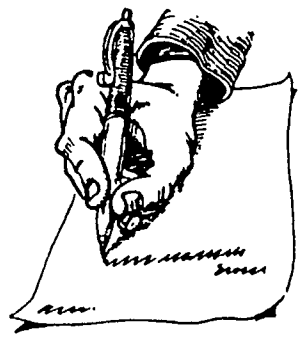
E. LEARNER WRITING

Perhaps the most important way learners can participate in the program is through their own writing. As well as being a natural extension of learning activity, such as language experience, it can provide a focus for activities such as:

- Writing groups that meet regularly to discuss and write about specific topics or to put together a newsletter or journal.
- Reading evenings, where new writers have a chance to read their work.
- Writing weekends or retreats where learners, staff and tutors get together in a relaxed setting to discuss, write and put together materials.
- Short "courses" on specific kinds of writing, i.e. poetry, stories, letters.

Learner writing can be presented in a number of forms, including:

- newsletter – which learners can edit and produce in regular sessions
- anthologies
- published books.



Learner writing is not a distinct category of writing, unrelated to any other form of writing. It is not necessarily limited to autobiography but can be related to other forms, such as poetry, short stories, cookbooks, travel books or any other literary genre.

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5. WORKING OUTSIDE THE PROGRAM

A. INTRODUCTION

Literacy work often includes working outside the program, in particular networking, advocating and promoting public awareness in the community. Many literacy workers see this as an integral part of their work. As well, it is in the program's interest to be linked to other programs, to belong to a strong literacy movement and to increase public awareness about the issue. However, this work can be the source of tension since many programs are already understaffed and under-resourced. The Board of Directors, for example, might question staff commitments beyond the program's immediate mandate when there is more than enough work within it. It may be helpful, therefore, to formalize these roles in a way that will make them part of the program's overall role, rather than "extras."

Shortly after beginning a literacy program, pressures arise for members of the program to participate in outside meetings and events. As a literacy organizer, many of these activities will be related to your work and will be perceived to have a significant impact upon your program. Nevertheless, it is sometimes difficult to find the time to venture outside the realm of your specific program. On the other hand, you may find you are away from your program more than you are there, and that your program suffers as a result. How do organizers organize their time?

- **Remember the number one priority** – Your program.
- **Long-term planning** – Decide in advance how much staff time will be devoted to "outside" activities such as assisting new groups with tutor training, regional network activities, local network activities, public speaking on literacy, public relations, etc.
- **Clear mandate** – The amount of time allotted to these activities will depend upon the priorities established by each group. (Larger, well-established programs may devote either a part-time or full-time salary exclusively for a staff person to liaise with other groups and to respond to inquiries.) Whatever is decided, all staff should have knowledge of the mandate and priorities to eliminate confusion or resentment about the array of duties required.

- **Stick to guidelines** – Once the mandate is established and time allotments agreed upon, hold yourself to it. Always, there will be many more valid requests to speak, promote literacy, advocate and educate than you can address. Pace yourself!

B. ADVOCACY

i. ADVOCACY FOR YOUR PROGRAM

Program participants may see ways in which government programs and policies can be improved. By acting positively on these perceptions it is possible to make changes that will improve literacy programs. In general, here are some tips for doing this kind of advocacy work.

- Pool your resources with other programs.
- Ensure your issue is clear, that facts are gathered accurately, and that proposals for solutions are well thought out and backed by other groups with similar concerns.
- Any documentation or presentations should be clearly written and delivered, with summaries of background, issues and solutions encapsulating the main points.
- Decide on a low, medium or high profile strategy, in cooperation with other groups.
- Decide on the best advocacy method: participation on committees, presentation of briefs.
- Develop a list of resources including individuals and agencies which cover a wide spectrum of issues affecting your participants.
- Make use of those resources.
- Remember that advocacy demands a certain mind set: an advocate is an agent, not a saviour; an advocate assists someone to help him or herself.

Advocacy for your program involves two key elements including promoting your program publicly and privately, and consulting with others in your community to develop links.

The Ontario Literacy Coalition is the provincial umbrella organization for English literacy. The Ontario Native Literacy Coalition co-ordinates Native community literacy programs. In addition, there are regional literacy networks and various special interest groups focusing on

specific aspects of literacy, e.g. family literacy, rural literacy etc. It may be worth making common cause with other, non-literacy advocacy groups as well. For example, by working with a local social planning council you can take forward issues relating to poverty and education.

ii. ADVOCACY FOR PLAIN WRITING

Only a small percentage of the adults with low reading and writing skills is actually enrolled in literacy programs. The literacy practitioner is faced with some important questions: Is there adequate access to information and services for these people in the community? What role does the community literacy program have in advocating for them? To help make access to information possible, print material that is used by organizations, institutions and agencies to provide information in the community must be readable for all people, especially those who have trouble reading. The program can play a key role here by helping services and organizations to evaluate the readability of their materials and to rewrite them if necessary. By offering this kind of plain writing consultation, the program is able to address the literacy needs of the wider community.

Among the key things to look for when determining the readability level are:

- the size and variation of the print
- the spacing on the page
- the organization of the material
- the balance between illustrations and text
- the difficulty and repetition of the vocabulary
- the complexity of concepts and the degree of abstraction
- the sentence and grammatical structure
- the length of the text.

C. PUBLIC RELATIONS

There are a number of reasons you will want to be able to publicize your program, and there are a number of ways a program can be publicized and a variety of media and resources you can use. Before you begin with any kind of public relations activity, however, you should be very clear on just what you hope to accomplish.

There are a number of reasons that a literacy group will need publicity:

- to attract students to the program
- to attract tutors to the program
- to increase the profile of the program in the community
- to increase awareness of the literacy issue

- to attract funders and resources to ensure the continuation of your program.

Naturally, there is some overlapping in all of these areas. However, the more direct you are in your approach to any one of these purposes, the more successful it will likely be.

The target area of your publicity will help you choose the proper medium. For example, while print is usually the cheapest and easiest medium to work with, it will probably be quite inappropriate for attracting learners – people who have difficulties reading – to your program. A public service announcement on the radio or television would probably reach a much wider audience. Yet print would probably be the ideal medium for reaching prospective tutors.

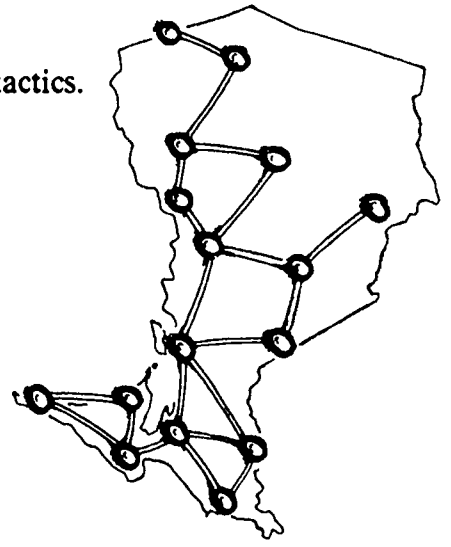
The publicity you create for your program may well determine its ultimate success. Your ability to present your message in an interesting manner will be essential. Keep on the look out for publicity opportunities, and try to contact resource people in your community who will be able to help out. Members of the media are usually responsive to the needs and aspirations of literacy workers, but they have to know who you are before they will be able to help you and your program.

KEY RESOURCE:

- Adult Literacy and Basic Skills Unit (ALBSU).*Publicizing Adult Literacy and Basic Skills*. London, U.K.: ALBSU, 1985.

  Topics covered:
  All aspects of publicity, different media and different tactics.

  Available from:
  Adult Literacy and Basic Skills Unit
  Kingsbourne House
  229-231 High Holborn
  London WC1V 7DA.



D. NETWORKING

i. REGIONAL NETWORKS

Participation in a regional network offers many advantages to the ongoing operation of your program. Through a regional network, you can:

- Tap the expertise of other – possibly more experienced – people and programs.
- Obtain new materials and resources.
- Discover new teaching strategies and methods.
- Develop a collective voice for literacy concerns in your community.

- Have a strategic base for funding through support, advice and references for grant applications.

In some areas, regional networks already exist. To find out if there is one in your area, contact the Ministry of Education, Literacy Branch (416) 326-5400/326-5493 (TDD), the Ontario Literacy Coalition (416) 963-5787 or your local school board or community college.

If a regional network is active in your area, the best way to begin involvement is to have your program placed on their mailing list (a nominal membership fee is usually required). Attend meetings as staff time allows, or send along your comments on issues arising from meetings. Next to ensuring quality service on your own program, many organizers feel that involvement in a regional network is of the utmost importance. It is the regional organizations which have the support of their local groups, strengthening their position as they work toward continual improvements in literacy programs.

Once you are involved in a regional network, pace yourself and your activities to maintain whatever balance had been previously determined through your organization's mandate. As an option, a number of people can represent your organization. This option acknowledges the contribution volunteer tutors and learners can make and prevents "burnout" which can affect even the most organized organizers. If you choose this strategy, staff have to be committed to spending time with the representative both before and after meetings.

ii. PROVINCIAL NETWORKS

OLC (Ontario Literacy Coalition)
ONLC (Ontario Native Literacy Coalition)
Laubach Literacy of Ontario
OACE (Ontario Association for Continuing Education)

iii. SPECIAL INTEREST GROUPS

In addition, there are the following special interest groups:

- Family literacy
- Rural literacy
- Computers-in-literacy
- Plain writing
- Oral history.

If you are interested in joining one of these groups, or if you are interested in starting a new special interest group, contact the Literacy Branch (416) 326-5400. The TDD line is (416) 326-5493 (Telephone Device for the Deaf).

E. SOME OTHER USEFUL SKILLS

i. HOW TO RUN MEETINGS

To keep meetings in order, four general rules may be helpful: 1) justice and courtesy for all; 2) majority rules; 3) any minority or dissenting opinions are recorded and recognized; 4) one topic is discussed at a time.

- Make sure your group has rules of order for meetings and that these are known by all members, especially by the person chairing the meeting.

- Determine an agenda for the meeting, in advance if possible. At the onset of the meeting, those present should agree to the agenda.
- For each item, define the problem or task at hand in clear and precise terms.
- Check throughout the meeting that the participants are comfortable with the progress being made and the direction taken.
- Have resources and information needed on hand, if possible.
- Decide on the order of business and stay on topic.
- The leader should encourage discussion and active participation; mediate differences; ensure all group members are on topic and agree to the process. The leader is in the unique position of facilitating the meeting: he or she should not direct the discussion or control the outcome of the meeting, but should ensure all the points are raised in an orderly manner and that some agreed upon approach or conclusion is decided.

- Keep an accurate record of the topics discussed, solutions sought, suggestions and work assignments and commitments. Make sure everyone present receives a copy and keep a record of others who may receive copies because of their status or affiliation with the organization.

Some meetings may be formal enough to warrant keeping minutes, and making motions which are voted upon by those present. Usually, these will be meetings held by the Board of Directors of an organization.

As an alternative, a consensus model can be used. This can be time-saving and useful for smaller items which require less formality.

ii. FACILITATING DISCUSSIONS

Your role as a facilitator in a discussion will vary according to the kind of discussion you have and the kind of group you are working with. In some situations, you will be a contributing member of the group as well as facilitator; in other situations, it will be inappropriate for you to do much venting of your own thoughts and feelings. Sometimes you will be a resource person; at other times group members will know more about the subject being discussed than

you. In most discussions, however, the facilitator's job includes keeping the discussion focused on the topic, clarifying (or asking for clarification) when something seems confusing, and helping create and maintain a situation where everyone can participate in a cooperative manner.

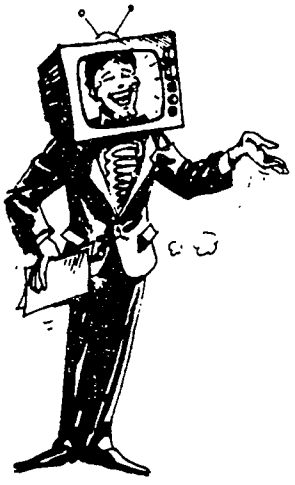
Some discussions don't need stimulating – they happen by themselves. In many cases, however, you will need to help the discussion get started. The following are some principles and techniques that will be helpful:

- Everyone should know exactly what the discussion is about and why it is happening.
- Give participants room to be involved. Being too directive in your role as facilitator may cause others to hesitate to take responsibility for what happens in the group. They may wait for you to provide all the guidance. If it seems that this is happening, make your style more low-key.
- Be a model. Your own behaviour can demonstrate to members how they can participate. Give responses based on your own experiences which set the tone for the types of responses and detail needed from the group. You can help set a relaxed, open, conversational tone for the discussion by being relaxed, open and conversational yourself during the meeting.
- Use questions to stimulate discussion. A simple question such as "How do you feel about this problem?" is a good way to start a discussion.
- Listing is a technique to generate ideas or approaches that may be used as the basis for the discussion.
- Going around the room and asking each person for a response is a version of listing.
- Write things down. During any discussion, and especially when listing, have a recorder (yourself, or another person) write each item on a blackboard or sheet of newsprint taped to the wall, so everyone can see what material has been generated and refer to it at will. This list can also be used as a basis for further discussion. For instance, once a group has generated a list of problems or concerns, they can look at the written list to break these problems down into general categories.
- Relate the discussion to people's immediate experiences. It is difficult for people to feel very involved in a discussion that is highly abstract or far removed from their own experiences. The more a discussion relates to people's own experiences and concerns, the more enthusiastically they will participate.
- Use humour to break tension or boredom, and use your judgement in determining the type of humour which will be most advantageous.
- Use your intuition in choosing your facilitating approach and techniques. As you gain experience facilitating, you will learn to adapt your style according to the group you are working with.

iii. HOW TO SPEAK PUBLICLY

Your first public speaking appearance may make you feel somewhat nervous or uncomfortable, but there are a few tips to assist you in feeling more prepared and confident.

- Know your delivery style – Do you prefer to have your comments written out in advance, or do you like a rough outline which will allow you to be spontaneous with your comments, while following on track? Use a system which fits your style.



- Establish a rapport with your audience – Begin by describing a funny incident on your way there, compliment the organization or location, praise the weather.
- Have a few key statements – Get your points across in a strong way. Use vivid examples to elaborate and demonstrate your topic through personal experience and background wherever possible.
- Practice beforehand – Try taping your talk, or rehearse on video. Failing high-technology avenues, speaking aloud in front of a mirror may help. Be critical of your voice, posture, nervous habits or fidgeting. If you were in the audience, would you be sitting on the edge of your seat, or checking your watch?
- Vary your pace and voice – Allow points to be made by inflection. A very serious talk comes across well if there are some humourous lead-ins first, then a switch to the serious side of the issue. Never use humour at the expense of a person or category of people; make sure the humour is the type everyone relates to equally.
- End on a strong note – The audience should be ready to take action or change their attitude or practices after hearing you speak; or, through your talk, you should be affirming the best notions and assumptions people in the audience had about literacy and learning to read and write.

iv. DEVELOPING WORKSHOPS

An organizer may choose to offer formal workshops from time to time as part of the on-going training experience for tutors and learners. Often, this is best planned with other literacy organizations in the region, so that resources and expenses may be shared.

- Identify the issue or problem to be addressed at the workshop. (This should have emerged from experiences and conversations with learners and tutors on the program.)
- Organize a planning committee of 5 - 7 people to develop a detailed workplan.
- Set measurable objectives you wish to fulfill at the workshop.
- Identify all agencies, groups or people needed for the success of the workshop and secure their attendance early in the planning phase.
- Gather all necessary information.
- Identify all personnel needed for each area (e.g. promotions, public relations, registration, exhibits, etc.).
- Develop the schedule of the workshop, allowing time for discussion and complete updates from committee members.
- Decide which presentation formats would be best for each topic: brainstorming, situational examples, demonstrations, exhibits, lectures, films, small groups, and so on.

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  This is a detailed manual designed to assist groups to work together effectively. It provides detailed explanations, supplemented and reinforced by numerous exercises, on all facets of the group as a functioning entity.

- Community Forum on Shared Responsibility, *Media for Social Change*. Toronto: The Community Forum on Shared Responsibility, 1986.

  This is a series of articles outlining strategies for community groups to use when dealing with the media. It outlines techniques to employ when using the media, advice on getting the media's attention, and warns about potential dangers to avoid.

- Hart, Lois, and Schleicher, J. Gordon, *A Conference and Workshop Planner's Manual*. New York, N.Y.: AMACOM, 1979.

  A comprehensive guide for the workshop planner. Its detailed information on all aspects of workshop and conference planning is supplemented by charts, exercises and workbooks.

- Literacy Volunteers of America, *Workshop Leader's Handbook*. New York, N.Y.: Literacy Volunteers of America, 1981.

  This brief article concentrates on the role of the workshop leader. It outlines some characteristics of the workshop leader and his or her roles. It also provides a schema for the planning of a workshop.

- Ministry of Citizenship and Culture, *Effective Meetings*. Toronto: Ministry of Citizenship and Culture, 1982.

  A short pamphlet for community leaders outlining a method for making meetings more productive. It deals with both formal and informal meetings and suggests a model for each.

- Ministry of Citizenship and Culture, *Speaking Publicly*. Toronto: Ministry of Citizenship and Culture, 1984.

  Another short pamphlet produced in the same series as *Effective Meetings* above. It presents a helpful, concise, plan for preparing and performing both short, informal and long, formal public addresses.

- Ministry of Citizenship and Culture, **Working with Volunteer Boards.** Toronto: Ministry of Citizenship and Culture, 1984.

  A useful guide to working effectively with a volunteer Board of Directors. It is filled with suggestions aimed at making the organization operate more efficiently and cooperatively.

- Robert, General Henry M., **Robert's Rules of Order.** New York, N.Y.: Jove Publications, 1983.

  A guideline to conventional rules of order used in formal meetings. Available in local bookstores.

- Wainberg, J.M., and Wainberg, Mark I., *Duties and Responsibilities of Boards of Directors in Canada,* 5th Edition Ottawa: CCH Canadian Limited, 1984.

  Written for the average, non legal-minded person, it fully explains, with clear examples, laws and principles governing boards of directors and their members.

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  A guidebook to meeting process and facilitation. Available at the Women's Bookstore, Toronto or by writing P.O. Box 70, Buffalo, NY 14222.

- Young Women's Christian Association, **Workshop Manual.** Toronto: YWCA, 1979.

  This is a complete, concise, manual based on a financial workshop model developed by the YWCA. It provides information and evaluation.

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6. COMMUNICATION SKILLS

A. WRITING — REPORTS, PLAIN ENGLISH, PAPERS, ANNUAL REPORTS, NEWSLETTERS, PROPOSALS, LETTERS AND EDITING

Strive for clarity in any writing you do as a literacy worker, whether it be reports, newsletters, proposals, memos or letters. Clarity comes from simplicity. Plain English writing makes your information accessible to the greatest number of people.

Know the audience for whom you are writing. Use familiar, direct wording and structures. Pretentious language is not good communication. Avoid jargon, idiomatic and metaphoric expressions, abbreviations and foreign words. Use basic sentence structure: subject, verb, object.

Make the document visually appealing by use of space, typeface, frequent headings. Pay attention to the size and length of the document. Use point form wherever possible. If you use graphics or illustrations, ensure they are clear and relative to the text.

Keep your message as positive as you can. It is always best to demonstrate accomplishments as you promote your work or appeal for funds.

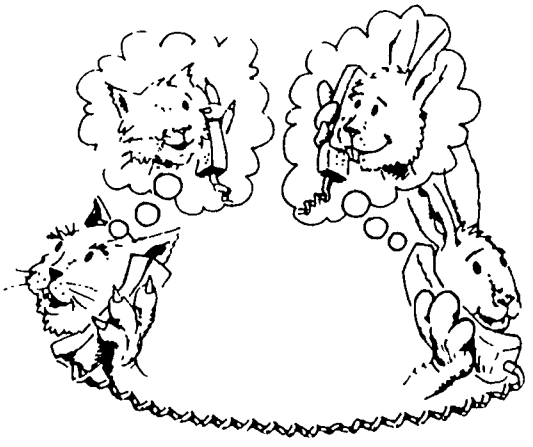
B. INTERPERSONAL COMMUNICATION

i. EXAMINING YOUR BIASES/ASSUMPTIONS

Everyone has biases and assumptions about others, particularly about people with whom there has been limited exposure and experience. Negative biases must be overcome if you are to be successful in coordinating a literacy program. Everyone involved needs to gain insight and understanding into the culture(s) they have personal biases against if they hope to overcome these biases with more accurate information.

To ensure that your literacy program does not inadvertently discriminate against people because of assumptions, it can be useful to go through the following process:

- Find out where the biases and assumptions come from. Are they based on the prevailing societal attitudes, from your background or upbringing, from lack of knowledge or experience?
- How are these assumptions communicated to you? Did these ideas come from the media, friends, personal experience, etc.?



- Identify those you have adopted as your personal beliefs, so that they are conscious.
- Strive to eliminate any negative assumptions and biases in an effort to treat every student and tutor fairly.

If literacy workers are also educating learners, tutors and the public toward an increased "critical consciousness," then the following exercises may be of interest. The purpose of these exercises is to determine how well we might be achieving a critical consciousness ourselves, before educating others. An understanding of the dynamic that goes on with learners can help literacy workers do their jobs better. The best place to start learning about it is with oneself.

ii. COMMUNICATING WITH LEARNERS

- The first assumption should be that the learner can communicate on your level. Do not "talk down" to a learner, but be conscious of your language, making every effort to communicate clearly.
- In the first interview, make points clear, pause for questions, invite the learner to say whatever is on his or her mind. Many people will feel more comfortable having their first contact with you on their own turf -- others may want to come to your office, while still others may wish to meet in a neutral location such as a park or coffee shop. Do your best to offer a comfortable meeting place for the learner.
- Be aware of body language. The seating arrangement can be welcoming or hostile. It is best to sit conversationally near someone, near a coffee table for example, as opposed to sitting at your desk with the learner facing you from the other side.
- Speak in everyday language. Avoid medical terms. For example, "You get confused when words sound alike," sounds better and says more than "What we have here is a case of auditory discrimination problems."
- Be encouraging and positive: "Your tutor will invite you to bring work to the lessons. Between the two of you, your lessons will be exciting and worthwhile. You'll look forward to each session." This has a much more positive effect than an ultimatum, such as "If you are accepted on to this program, we expect to see motivation, determination, and obedience to your tutor. If not - there are many others waiting to take your place."
- Remember to take your cue from the learner who will indicate through body language, eye contact and comments which communication style works well, and which closes off communication altogether.

iii. INTERCULTURAL, INTER-CLASS COMMUNICATION

In literacy work, it is inevitable that you will come in contact and work with people from different classes or cultures than your own. As important as recognizing and being aware of your own biases is your ability to put aside any biases or assumptions you may have held. Be receptive to what each person has to say and how it is expressed.

- Enjoy the opportunity of new experiences and awareness derived from sharing work and interests with people from different backgrounds than your own.
- Treat everyone with equal respect and dignity: reflect this in your choice of words, your tone and your actions.

- Accept differences – do not impose your customs on others; instead, learn something about the different customs shared by people from different classes and cultural backgrounds.
- Remember that varying cultures have varying grammatical and structural forms which are valid and logical. Do not impose your way of speaking on another person. Instead, take the opportunity to learn about the other person. At an appropriate time a discussion may emerge when these verbal differences and rationales can be made known in an atmosphere of learning for everyone involved.
- Make every effort to become more aware of other cultures so that members of different cultures are afforded the same dignity and rights enjoyed by all Canadian citizens.

iv. COMMUNICATION WITH FELLOW WORKERS (STAFF MEETINGS, CONFLICT RESOLUTION)

- Some meetings can be held quite informally over lunches or coffee, which offers a break from the usual stress or work atmosphere, and may encourage people to communicate more freely.
- At the onset, take time to establish the process of the meeting. This assists team building, and provides a bit of social time and a chance to develop the group dynamic. At the same time, everyone is in agreement with the goals and understands a common purpose for the meeting.

- Any existing problems should be brought into the open.
- Develop a clearly defined decision-making process that is known by all.
- Allow all interested members of the staff to participate at meetings and allow everyone their say without interruption.
- Be aware of your feelings and express them if they are hindering your work.
- Try to create and maintain an atmosphere of honesty.
- Understand each person's position. Listen effectively when someone is speaking to you. Try to put yourself in the speaker's shoes.
- Ask questions for clarification.
- Examine any assumptions and generalizations you may have about a point.
- Don't be afraid to criticize someone if you feel he or she is not acting in a way that is beneficial to the program. Time can be set aside to deal with conflicts, if necessary.

v. TELEPHONE SKILLS

Phone skills are really telephone etiquette. The following guidelines may prove helpful:

- Develop a rapport over the telephone to compensate for the loss of face-to-face contact.
- If someone calls to inquire about anything, deal with the concerns expressed as quickly as possible. Do not bombard the person with questions of your own.
- If you call someone for information, be very direct – don't consume more time than necessary.
- Know when to meet someone – don't attempt to gather a volume of information over the phone when a meeting might be more practical.
- Try to get back to people as soon as possible. It demonstrates organization and courtesy on your part. If you are too busy to deal with the call at the time, call back to explain why, and establish a more convenient time to speak.

vi. CHECKLIST OF COMMUNICATION SKILLS

I am:

- able to write in plain English
- able to look beyond personal biases
- able to accept people as they are
- unobtrusive – I do not try to project personal values or morals on others
- an active listener receptive to what others say
- diplomatic in solving conflicts/problems
- flexible
- sensitive
- a person with a sense of humour.

Depending on how you responded to the above list, you may find areas you wish to work on.

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  Provides a step-by-step, detailed guide to improving communication skills. Focused on communication within small groups.

- Center for Conflict Resolution, "Working with Emotions," from *Building United Judgement.* Madison, Wisconsin: Center for Conflict Resolution, 1981.

  A short article on the effect emotions have on the functioning of a small group. Offers information on how and why the group should be aware of emotions as well as how groups can use emotions to their advantage.

- Condon, John L., and Yusef, Fathi, *An Introduction to Intercultural Communication.* Indianapolis, Indiana: Bob Merrill Educational Publishing, 1975.

  A lengthy, detailed and scholarly guide to the theoretical aspects of intercultural communication. Augmented by case studies from around the world.

- Crone, Catherine D., and Hunter, Carman St. John, **From the Field.** New York, N.Y.: World Education, 1980.

  A manual designed by education workers for education workers. It contains numerous experiential exercises to teach concepts and methods through doing. The exercises deal with bringing people together in a learning group, discovering individual and group needs, choosing methods and materials, assessing progress and results, and designing and testing participatory learning activities.

- Harris, Roxy, **Caribbean English and Adult Literacy.** London, U.K.: Adult Literacy and Basic Skills Unit(ALBSU), 1979.

  An outline of a method for teaching English to Caribbean-English speaking people. A useful resource if one needs practical information on teaching a person from a different culture. Available from ALBSU, Adult Literacy and Basic Skills Unit, Kingsbourne House, 229/231 High Holborn, London WC1V 7DA.

- Kohls, Robert L., **Developing Intercultural Awareness.** Washington, D.C.: The Society for Intercultural Education, 1981.

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  A short pamphlet for community leaders outlining a method for making meetings more productive. It deals with both formal and informal meetings and suggests a model for each.

- New Society Publishers, **Resource Manual for a Living Revolution: A Handbook of Skills and Tools for Social Change Activities.** Philadelphia, PA: New Society Publishers, 1985. Available from New Society Publishers, 4722 Baltimore Avenue, Philadelphia, PA 19143.

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- Webber, Marlene, **The Right to Read: Organizer's Guide.** Toronto: Frontier College, 1983.

  A guide to organizing a program consistent with a student-centred approach. It provides concise information on Frontier College's SCIL (Student Centred Individualized Learning) approach to teaching, recruitment of volunteers, outreach to

learners, tutor training, program publicity and fundraising. Available from Frontier College, 35 Jackes Avenue, Toronto, Ontario, M4T 1E2 (416) 923-3591.

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7. SUPPORT FOR LITERACY WORKERS

A. STRESS AND BURNOUT

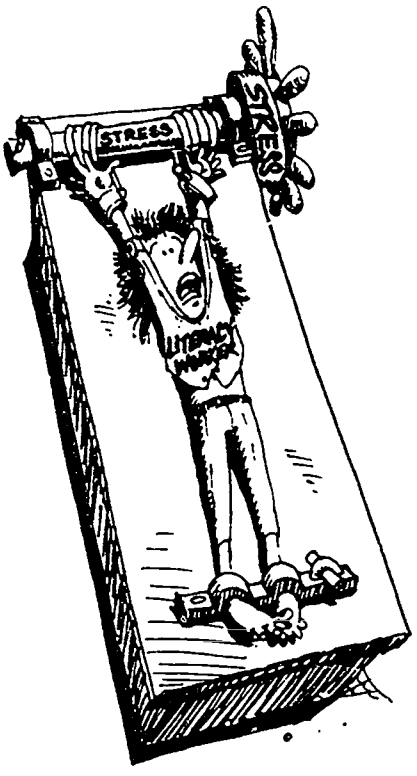
Community literacy work is often very rewarding but it can be demanding too. Most programs have small staffs (often one person) and long waiting lists of tutors and learners. Just keeping up with this demand, apart from all the other aspects of running the program, makes for a heavy workload and this can result in stress. Among other things, extreme stress can lead to:

- emotional strain – depression, boredom, anxiety, loss of self-esteem
- strain on relations with others – defensiveness, withdrawal, blaming others
- physical strain – high blood pressure, headaches etc.

If extreme stress is allowed to continue over a long period, it can lead to burnout. Burnout is often a combination of emotional exhaustion, depersonalization of work and reduction of self worth that makes it impossible to continue in the job.

These conditions may sound rather dire but most people who have worked in the field will encounter them at one time or another. Fortunately, a lot of work has been done on the topic of stress management and it is possible to take measures, as a matter of course, that reduce the effects of stress. Some of these are:

- Set reasonable limits – having specific, obtainable goals helps to establish reasonable expectations of yourself.
- Time management – there are a number of good books which describe the principles of efficient time management.
- Support groups – made up of program participants, other literacy workers or just friends.
- Develop problem-solving strategies – try to anticipate conflict and crises by talking and reading about problem-solving strategies.
- Find ways to relax – this will be different for each individual, everything from T'ai Chi to hiking.
- Take steps to prevent overwork – manage your time; plan tasks in a calendar; make use of volunteer assistance; keep a manageable



schedule. If people end up waiting longer to see you, document the length of time people wait for appointments, and submit this information with funding requests to increase staff.

- Delegate authority – ask volunteers for help if possible; don't try to do everything yourself. For example, volunteers can assist with updating phone lists, cataloguing new materials, planning special events, assembling packages for new volunteers, preparing materials for training sessions, or conducting brief orientation sessions.
- Never be afraid to ask for help – take time to meet with staff or the Board about the work load. Even out the distribution by adjusting job descriptions.
- A successful program is a source of support – the satisfaction of knowing you are part of a vital, necessary and successful program can keep you motivated.
- Remember, if you are tired – take a break or a vacation. If you don't want to do the job anymore, quit.
- Allow your friends and folks from the program to pitch in. Treat people like members of a team and they will be there to help you, thus preventing the exhaustion that stems from overextending yourself.
- Schedule time for fun – take in a movie, keep up with your friends, enjoy a nature hike or activity that refreshes you.

KEY RESOURCE:

- Vineyard, Sue, *How To Take Care Of You . . . So You Can Take Care Of Others*. Downers Grove, Illinois: Heritage Arts, 1987.

Topics covered:
A survival guide for human service workers and volunteers, the book discusses mental and physical health, burnout and how to avoid it, and how to stay alive and healthy.

Available from:
Heritage Arts Publishing
1807 Prairie Avenue
Downers Grove, IL 60515

B. EVALUATION OF YOURSELF AND OTHERS

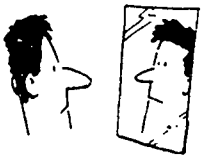
Evaluation is crucial for maintaining the effectiveness of an organization. Any decisions based upon an evaluation must be founded upon objective evidence. Don't allow personal feelings to impede accuracy.

Evaluation works best when everyone agrees upon the purpose, the questions being asked and the process. Plans should be worked out in advance regarding the impact the results of the evaluation will have upon the operation of the program, or the performance of any staff involved.

Also, think about who the evaluation is for – for example, staff, the Board, funders, etc. What they need to know will determine how the evaluation is structured, who participates and the time frame. Not every aspect of a program is necessarily evaluated at the same time.

Generally:

- Consider every angle of the situation.
- Evaluation should be continuous.
- Use frank and probing questions.
- All evaluation should lead to action.
- Members should evaluate their own actions.
- All involved should understand the purpose, rationale, questions, consequences and expectations of the evaluation process.
- Take time out to celebrate accomplishments.



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  This short guide provides the organizer of a literacy program with information on the training of tutors. It offers information on why, when and how to train tutors, as well as suggestions on evaluation of a learner's progress.

- Adult Literacy Unit and Basic Skills Unit, *An Introduction to Literacy Teaching. London, U.K.: Adult Literacy and Basic Skills Unit (ALBSU), 1980.*

  A short booklet which concentrates on the methodology of teaching adult literacy. However, it also contains a useful chapter on evaluation, which merits its inclusion in this section.

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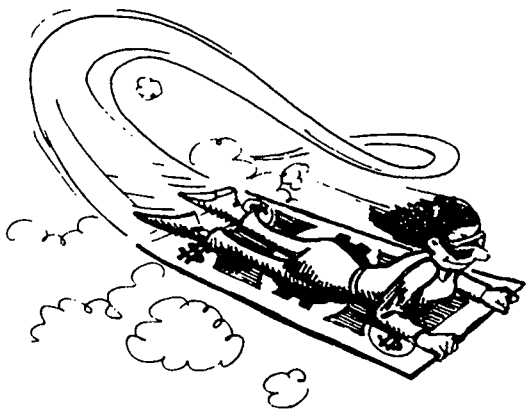
8. ADMINISTRATION

A. FINANCIAL PLANNING, FUNDRAISING AND PROPOSAL WRITING

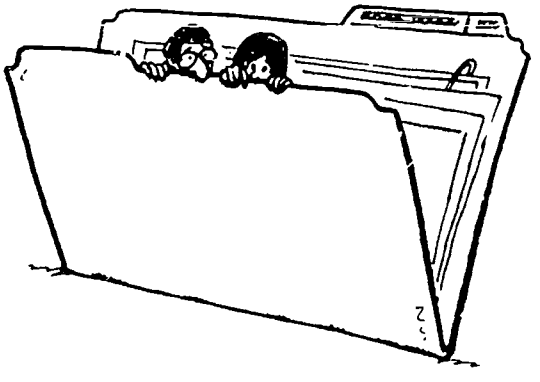
While financial planning is primarily a Board responsibility, often it is the program coordinator who first sees where the money is going and where it is needed. A resource, such as a questionnaire, may be useful for launching a discussion around financial issues at the Board meeting, at which time all the stakeholders can contribute to the financial plans and goals of the organization.

Typical questions might include:



- Does the Board determine whether activities are consistent with those indicated in the operating budget?
- Is the current budget consistent with the organization's goals and plans?
- Do you review on a monthly or quarterly basis the actual income and expenditure in comparison to the budget?
- Does the Board approve the operating and capital expenditures budget?
- Must the Board give its approval before those budgets can be exceeded?

- Are funds donated for special purposes kept separate from general funds?
- Does your organization use numbered cheques with its name and address printed on each cheque? Do you know who has custody and control of unused cheques?
- Are dual signatures required on all cheques?
- Is petty cash access limited to one person?
- Is your organization regularly audited?



B. RECORD KEEPING

i. FILE SYSTEMS

To have accurate, up-to-date files, you must be in regular contact with staff, learners and tutors.

- Keep detailed files to inform you of the effectiveness of the program and the direction in which you are heading.
- Organize your files into logical sections. Ensure you can find what you need easily. Make use of main- and sub-categories, or file by colour.
- Date everything that goes into a file, regardless of your filing system.
- Decide on how you wish to file materials: alphabetically, chronologically, according to subject, or according to a numerical code.
- Choose suitable, direct and concise file headings.
- Keep the file up-to-date. Do not leave materials lying about that were supposed to be filed for reference. This can create confusion and delay.
- Create archives to store files which are not used regularly for reference. For example, old versions of funding proposals, records of tutors and learners who have left the program.
- Stick to your filing plan. If anything is changed, inform everyone who accesses your files.

ii. BOOKKEEPING

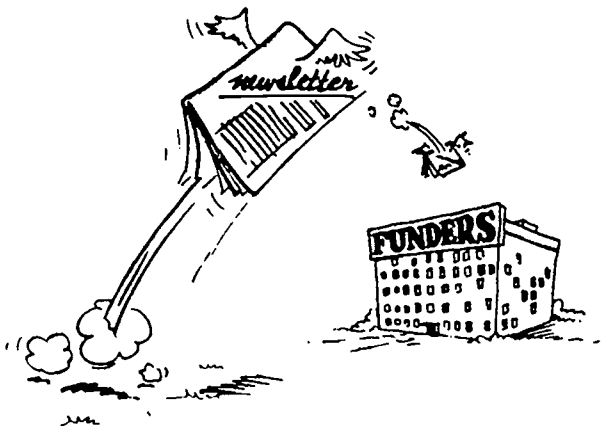
It is not necessary for program coordinators to be bookkeepers, but a basic knowledge of bookkeeping procedures will prove invaluable.

- Purchase the services of a qualified bookkeeper if you are not knowledgeable in this area. This preserves your ability to account for funds, especially when you are using funds obtained from other sources.
- Keep accurate records of all financial transactions, whether it is money in or money out.
- Keep accurate records of donated goods – furniture, books, equipment, etc. Indicate the value in monetary terms of such donations.
- Stress the importance to all staff or others claiming expenses on your program of submitting receipts which verify the cash expense.
- Document all expenses for which no receipts are obtained through petty cash vouchers which are co-signed by the coordinator and/or treasurer and/or bookkeeper.

- Maintain headings for expenses and revenues which correspond to headings in the ledger (established by the bookkeeper) and be sure that ledger headings correspond with headings in the budget.

C. COMMUNICATING WITH FUNDERS

Funders expect to be contacted whenever someone is requesting money or providing required information. However, it is a good practice to communicate with your funder(s) regularly. A number of means can be used, depending upon the time available, how well organized you are, and your ability to seize an opportunity or make use of another, existing document.



- Send copies of any newsletters, bulletins, student writings or announcements you produce.
- Send press clippings: it demonstrates you are doing what you said you would.
- Send reports on workshops or special projects you organized.
- Send evaluation data: regular updates on your progress.

Sometimes, this can be summarized in a few pages; sometimes, evaluation may be a major project and you will need to generate a major report. You can use your evaluation data to your advantage when it supports your objectives and clearly shows your organization is making a positive impact in the community.

If these communication practices are followed, your funders will know that their contributions are appreciated, well utilized and that with their assistance, your program is fulfilling its mandate. A high profile based on positive achievements will contribute to a positive reception when making further proposals.

D. WORKING WITH YOUR BOARD OF DIRECTORS

Your first task, when working with a Board of Directors, is to develop a rapport and build trust. Get to know individual Board members, as it is much easier to communicate with people you know. Develop good, strong communication links with the Board, and use them regularly.

Always deal with the whole Board on issues that concern the whole Board. Singling out an individual, committee or clique can be divisive and will lead to weakening the effectiveness of the Board, and ultimately your relationship to the Board as a whole. Ensure that you are kept aware of any decisions that the Board makes so that the goals can be accomplished.

Keep abreast of all developments in your project so that in the event you are required to provide information to the Board, you are prepared in advance. Likewise, know what is happening within the Board: are there problems, conflicts, recent decisions? If there are any serious problems within the Board, help to correct them. A healthy Board is essential for a healthy program.

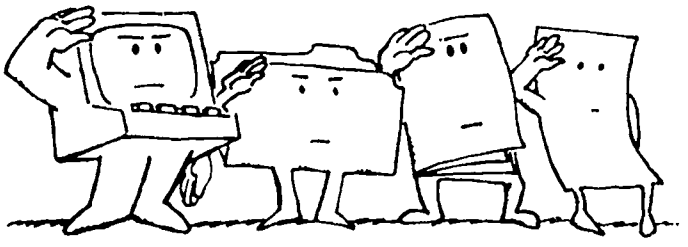
E. OFFICE MANAGEMENT

Plan out the kind of office you want to run, and think about what would make it go smoothly. As soon as possible, develop the following:

- Job descriptions for yourself and any other staff/volunteer positions. Be sure to clear these with the Board. Indicate the proportionate time that should be spent on each duty, for example 1 day per week, 20%, etc.
- Forms you may use – Learner Information, Tutor Information, Evaluation, Phone Inquiry, Lesson Plan, etc. Be prepared to modify these as you develop more experience and as needs arise.
- Reporting methods – Does the Board require written or verbal reports? What documentation is needed? What are the funders' criteria as expressed both in the contracts and verbally? What information do you want easily accessible? Are there forms that would assist in gathering this information?
- Filing systems – information must be at your fingertips and easily found when needed. Plan a filing system that suits your needs. Write a file guide so that others can decode your system in the event that an urgent situation arises and you are unavailable. Would index cards be more appropriate for certain kinds of information such as lists of learners or tutors waiting, contacts and resources?

Determine how you want the office to run. Do you want it informal, so that people feel comfortable dropping by? If so, try to have a coffee pot brewing and comfortable furniture conducive to informal gatherings. Or, do you prefer a formal office setting where everyone needs appointments?

If you have other staff or volunteers assisting in a staff capacity, make sure your assumptions are made explicit to avoid misunderstanding. Work at keeping others well informed about your activities and changing priorities. Allow staff to work on their own and encourage them to solve their own problems. Your interference may not be needed to ensure they complete their work. Establish good communication channels by having regular staff meetings, providing informal updates as required, or, if people staff the office at different times, use a communication book where messages can be left about tasks completed, updates, and work that is waiting.



F. ACCOUNTABILITY

Accountability to funders, participants, the community or the Board requires accurate documentation. Keep one step ahead of everyone by having organized information readily available for members of your program or outside agencies involved with it.

Maintain accurate data and statistics of learner and tutor participation on the program. Your data might include any of the following:

Tutoring information:

- dates of lessons, tutoring sessions or classes
- total hours of actual tutoring, monthly, quarterly and yearly
- descriptions of learner competence at the beginning of the program
- descriptions of learner progress/achievements.

Descriptions of learner profiles:

- learners unemployed/employed
- learners labelled as ex-offenders, disabled, etc.
- age of learners
- last formal grade level achieved
- average length of involvement of learners in the program (learner hours)
- end result (entered continuing education program, off parole, began working, received a promotion, etc.).

Descriptions of tutor profiles:

- tutors employed/unemployed
- tutors labelled as ex-offenders, disabled, etc.
- age of tutors
- last formal grade level achieved
- average length of time of involvement of tutors in the program.

Information on tutor training:

- dates and number (total) of training opportunities
- categories/topics covered
- resumes of trainers/group leaders

- number of people who attended each session
- summaries of tutor evaluations of each session
- average number of training events each tutor participates in.

Information on special events undertaken:

- dates and number (total) of special events
- nature/purpose of event
- number of learners/tutors who participated
- results.

Materials developed:

- nature/purposes of materials
- staff hours utilized
- consulting hours utilized
- volunteer hours contributed (learner/tutor/other)
- results.

Data on other activities, e.g. consulting, meetings, proposal writing, evaluation of staff, program, etc.:

- nature/purpose of activity
- staff hours utilized
- consulting hours utilized (paid or donated)
- volunteer hours contributed (learner/tutor/other)
- results.

ANNOTATED BIBLIOGRAPHY

- Blanchard, Kenneth, and Johnson, Spencer, **The One Minute Manager.** New York, N.Y.: Berkeley Books, 1982.

  A short guide written in narrative form on becoming a more effective manager. It elaborates the authors' three step plan on effective management which will benefit one's organization, whether profit or non-profit. Available through bookstores.

- Brakely, George A. Jr., **Tested Ways to Successful Fundraising.** New York, N.Y.: Amacom, 1980.

  A guide for the community group fundraiser written by a noted professional in the field. It outlines the fundamentals of fundraising, along with some of George Brakely's successful methods.

- Fetridge, Clark, and Minor, Robert S., **Office Administration Handbook.** Chicago, Illinois: Partnell Corporation, 1977.

  A very large and detailed handbook which deals with all facets of office administration. It is designed for use by the executive of a large corporation, but some of the general information should be useful for smaller, community-based groups.

- Institute for Non-Profit Organizations, *Grant Proposal Checklist.* Toronto: Institute for Non-Profit Organizations, 1977.

  A brief but complete article designed to ensure the effectiveness of grant proposals. It provides a list of the items which should be contained in the proposal, as well as a summary of what each section of the proposal should include.

- Kiritz, Norton J., *Program Planning and Proposal Writing.* Los Angeles, California: The Grantsmanship Center.

  A detailed guide to proposal writing which begins with some general guidelines on writing an effective proposal. The body of the article is composed of detailed examples of the contents of each section.

- Ministry of Citizenship and Culture, *Summary of the Basic Bookkeeping System.* Toronto: Ministry of Citizenship and Culture, 1982.

  A very short article on the basic bookkeeping system. It explains, in a concise format, the use of the fundamental accounts and journals needed by a small organization.

- Voluntary Action Resource Centre, *Financial Management for Community Groups.* Voluntary Action Resource Centre, 1984.

  A checklist designed to evaluate a community group's financial management skills. It is merely a list of questions, and does not provide any direct information on financial management.

- Young, Joyce, **Shortcuts to Survival.** Toronto: Shortcuts, 1978.

  A concise manual for fundraisers. It provides information on approaching business, government and charitable foundations for funds. It is enhanced by shortcuts and stories from the author's personal experience.

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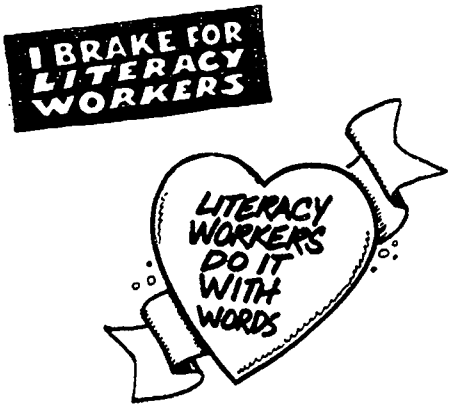
9. RESOURCES

A. MATERIALS USE, CREATION, PRODUCTION, WRITING

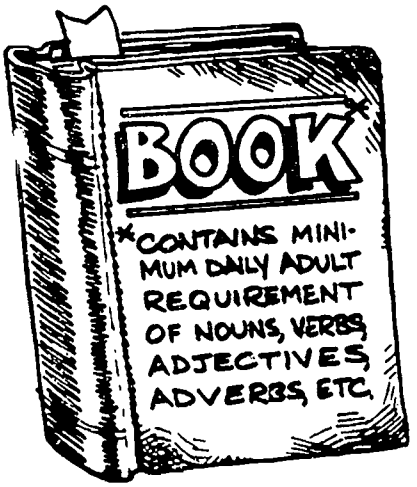
In learner-centred approaches, the learning material will be chosen to fit the learner's interests and aspirations. In general, it is unlikely that any one book or series can meet this need. Instead, a combination of materials should be used, including:



- Texts dictated by the learner. (See language experience approach in books of methodology.)
- Actual texts – newspapers, articles, manuals, adventures, etc.
- Simplified versions. (See guidelines to plain writing.)
- Reading programs or series – with caution.
- Books written by other learners.

More than anything, what is needed in this process is a sense of creativity. None of the suggestions below demands agility in the arts, creative writing or computer programming. Indeed, many an idea has been ably (and comically!) represented by stick figures, boxes and arrows. Many, many resources exist, written particularly for tutors, which describe the generation of home-grown materials which are quite inexpensive and readily available. (See the bibliography.)

- Materials emerge from the everyday life of the learner. For example, in a work-related program, letters, bills, bankbooks and union agreements might form part of the curriculum.
- Materials are familiar to the learner – e.g. magazines, food labels, assembly directions, cookbooks, newspapers, bumper stickers, billboards, and so on.



- Tutors and learners together can generate stories, or alternately write lines for characters on a favourite television show.
- Photographs from illustrated magazines such as *Equinox, Wa Wa Tay or National Geographic*, art books, maps, and family albums can provide an excellent catalyst for launching creative writing or letters to family and friends.
- Completed writing can be typed by either the tutor or learner, instantly providing a professional looking copy.
- Those who have access to word processing equipment may find the word processing programs, by

virtue of their flexibility, quickly move learners past their fear of committing ideas to paper. The ease with which text can be moved and rearranged, leaving a perfect copy, is quite rewarding and remarkable to a learner who has a history of painfully struggling over each word.

- Materials generated by learners and tutors can assist others engaged in literacy programs by sharing ideas and examples through program newsletters or newsletters generated by regional networks. Some programs have built in a learner-generated publication which is widely distributed. Such publications provide learners with the opportunity to see their writing in print and can offer a huge incentive for improving writing skills.

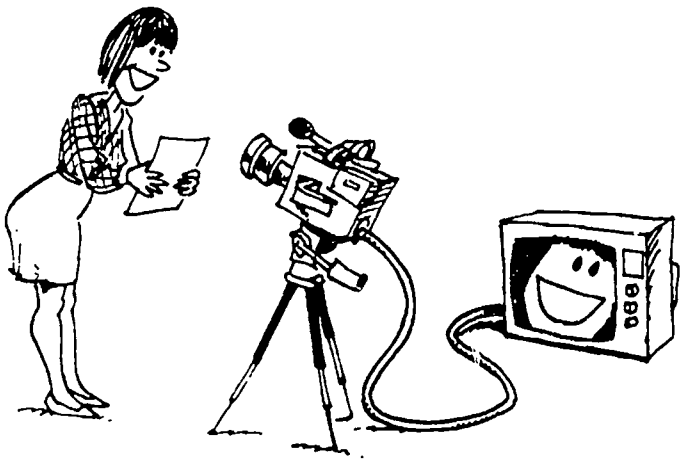
B. SELECTING, DEVELOPING, MAINTAINING AND EVALUATING RESOURCES

Avoid using programmed, pre-packaged resources as instructional kits for learners. The research on adult education emphasises the need for learner-centred, flexible curriculum with a basis in everyday applications. Be inventive, creative, and remember that the learner's needs are top priority.

Be free to experiment with untapped resources – investigate learner-generated stories as reading material, use films, presentations, drama, theatre, scripts, graffiti, bumper stickers, posters, slide shows, photo-journals, cereal boxes, diaries, bills, ads, letters, job applications, forms, etc. as learning material.

If you collect resources, keep them in an area where they are easily accessible to everyone interested. Develop a way of cataloguing materials and create a sign-out sheet so materials can be tracked.

C. USING AND MAINTAINING A/V EQUIPMENT



Audio/visual equipment can be a highly motivating learning tool. Word processors can augment language experience; a camera can create a photo-story; films can launch discussion and critiques, scripts or storyboards. Slide shows can set the scene for creative writing, as can photographs. Videotape cameras and players can develop a learner's ability for a job interview, making speeches or meeting new people; a tape recorder can allow a learner to evaluate his or her own progress in reading aloud.

Some equipment may be best used if it is always on hand. Alternatively, special projects can be designed to make use of equipment on loan for brief periods or for rented equipment.

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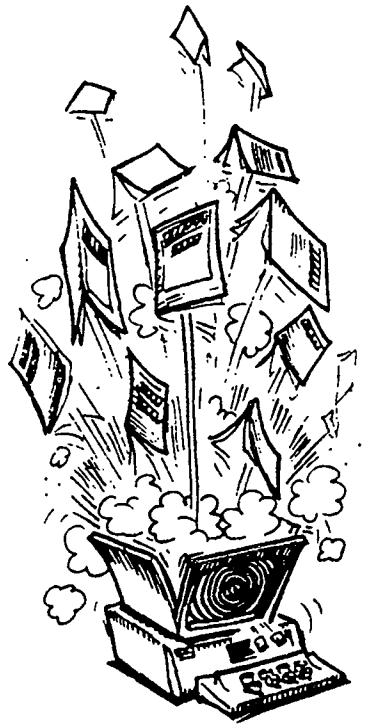
Whatever equipment you use, take good care of it. Technical equipment should be kept dust free and protected from extreme hot or cold temperatures and rain. Follow the directions in the manuals provided and make sure anyone using it does likewise.

D. PRODUCTION SKILLS



As your program grows, you may wish to produce newsletters, booklets of student writing, pamphlets, instruction manuals, etc. The more skills you have in production, the quicker and more economically these goals can be fulfilled. Wherever possible, use volunteers (both learners and tutors) to assist. They will welcome the involvement! Inquire at art stores and print shops for advice on materials and methods. They will inform you about any graphic equipment or supplies you may need, offer layout tips and provide stencils or other useful gadgets. Or, you may have access to a computer program on desktop publishing which would provide electronic stencilling, cutting and pasting and so on.

If a major project develops or is planned, consult with other literacy groups, or your regional network. If a couple of programs have a need for printing simultaneously, a group request may be economical through a central source. Otherwise, consult with other groups or businesses in your area to find good, reliable assistance – maybe even group discounts!

10. GENERIC JOB DESCRIPTION FOR COMMUNITY LITERACY ORGANIZERS

As noted in throughout this guide, the community literacy organizer must have a variety of skills, ranging from educational to interpersonal. While the nature of the specific program will dictate the exact job description, there are a number of activities which most organizers would likely need to be perform.

Work with Tutors and Learners

- Assess the needs of potential learners.
- Develop and apply criteria for selecting learners.
- Keep informed about teaching methodologies by: 1) Reading current literature and 2) Tutoring at least one learner personally.
- Document learner progress.
- Develop criteria for selecting tutors.

- Interview prospective tutors to determine their suitability.
- Handle telephone inquiries from potential learners, tutors and others.
- Develop and implement evaluation standards for the program.
- Organize and deliver tutor training sessions.
- Communicate with learners and tutors regularly (at least once per month).
- Support tutors and learners by offering advice, materials, and by being competent in your work.

External Functions

- Increase public awareness of literacy as a social issue.
- Disseminate information about the program (publicity).
- Create liaisons with other literacy organizations by developing or joining networks and through individual contact.

Office Skills

- Establish record keeping procedures.
- Maintain records.
- Establish inter-office communication procedures.
- Develop and implement methods for self, staff and program evaluation.
- Provide reports to funders.
- Determine the duties of staff and provide supervision as required.

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AFTERWORD

We hope that you have found this Guide a useful starting point for answering the questions which arise while coordinating your literacy program. A sincere effort has been made to be collaborative and to include the best resources our consultants in the field had used in practice.

Since this is the first attempt at this type of project, your comments and feedback would be most welcome. If you would take a moment to send in the questionnaire on the following page, you will help shape future editions of this Guide.

Thank you.

Please complete and return to: Ministry of Education, Literacy Branch, 625 Church Street, 6th Floor, Toronto, Ontario M4Y 2E8.

What is your involvement with literacy?

- ☐ Staff
- ☐ Learner
- ☐ Tutor
- ☐ Volunteer
- ☐ Board
- ☐ Freelance

Other (specify) _____

In what ways was this information helpful to you?

_____

_____

_____

In what ways could the *Resource Guide* be improved?

_____

_____

_____

If you are aware of useful resources which are not included here, please attach description with a full bibliographical reference, information on obtaining the resource, and a price, if possible, to our office.

Optional: Please provide us with your name and address. If supplied, this information will be added to a mailing list for any further editions.

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