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AUTHOR Leef, Carol; Riddle, Tamara
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ABSTRACT

This manual was developed as a guide for setting up a workplace education program. Based on the Workplace Education Project (WEP) in Peterborough, Ontario, the manual contains nine chapters that provide details of the WEP and suggestions for implementing the process in other locations. The first chapter provides a rationale for a WEP program, and the second chapter suggests the key components necessary to determine a focus and a plan for a program. Chapter 3 suggests methods for approaching different sectors (manufacturing, health care, seasonal workers, and others); the implementation process is detailed in chapter 4. Steps in the process are as follows: initial contact, workplace needs assessment, implementation model, employer survey, information for employees, conducting employee interviews, learning plans, report to company, selecting the provider, starting the class, instructor liaison, and participant memos. Information gathering and storage are addressed in chapter 5, and marketing is discussed in chapter 6. Approaches to advocacy and support for employees, employers, and instructors are covered in chapter 7, followed by a chapter on program evaluation methods and an example evaluation from the WEP program. The final chapter lists resources: 3 videotapes, 24 publications, 8 newsletters, and 29 national and provincial or territorial contacts. (KC)

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Work Together - Learn Together



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A Model that Incorporates Community Partnerships

Sponsored by National Literacy Secretariat

by
Carol Leef and Tamara Riddle

Workplace Education Project - Peterborough, Ontario
1996

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Advisory Committee

1. Peter Morgan, Human Resources, City of Saint John, Saint John, New Brunswick
2. Paul Groody, Human Resources, City of Saint John, Saint John, New Brunswick
3. Kathy Neill, Co-ordinator, Literacy Ontario Central South, Peterborough, Ontario
4. Ann Osborne, Eastern Regional Consultant, OTAB, Kingston, Ontario
5. Julie Salembier, Workplace Literacy Advisor, Alberta Workplace Literacy
Advisory Committee, Edmonton, Alberta
6. Sheila Vlachos, Co-ordinator, Outreach Literacy Program, Lindsay, Ontario

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We would also like to thank **Human Resources Development Canada** for funding the Workplace Education Project since June 1993. Without the support of the **HRDC**, we would not have had the opportunity to develop this community partnership model.

Project Staff

Carol Leef
Workplace Education Co-ordinator

Tamara Riddle
Special Projects Co-ordinator

Kathy Neill
Literacy Ontario Central South Co-ordinator

Jacqueline Riddle
Administrative Support

Purpose of this Manual...

It is our hope that this manual will be used as a guide for setting up a workplace education program.

Whether used by an education provider, a business, union, or a neutral organization, the contents of this manual can be adapted to a variety of perspectives. This manual is not intended to be applied, as is, to every workplace, but for useful segments to be used, modified, and/or adapted as required for specific situations.

Contents may be copied for use. Workplace Education - Peterborough would appreciate being acknowledged as the source.

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Acronyms and Definitions

Alphacom	Ontario literacy computer communication network
BEST	Basic Education for Skills Training- a peer-tutoring program of the Ontario Federation of Labour
BUSINESSES	(As defined by WEP)
• SMALL	50 or fewer employees
• MEDIUM	51-100 employees
• LARGE	100 + employees
CEC	Canada Employment Centre - now Human Resources Development Canada
Credit Courses	High School classes for credit toward a grade 12 diploma
Correspondence Courses	Offered by Board of Education. Independent work with access to assistance at Adult Education Centre
Existing classes	Scheduled classes which are offered through boards of education, colleges, and universities
HRDC	Human Resources Development Canada - formerly Canada Employment Centre
Independent Study	(see correspondence courses)
Interview	Initial interview by co-ordinator of individuals in a confidential setting to determine appropriate type of learning and approximate starting level. (training needs assessment)
LAI	Labour Adjustment Initiative - a program for displaced workers- funded by OTAB - now included in W/WEBS
LOCS	Literacy Ontario Central South

Maturity Credits	Credits given to mature students returning to high school studies. Credits are based on original high school credits (if any), work experience, courses taken since high school and length of time out of a high school setting. Number of credits is determined by Board of Education personnel once a student is attending a credit course.
NLS	National Literacy Secretariat
OBSW	Ontario Basic Skills in the Workplace - an upgrading program offered in the community college setting - is included in W/WEBS
ONA	Organizational needs assessment
OSDO	Ontario Skills Development Office
OTAB	Ontario Training and Adjustment Board - Provincial Government - now Ministry of Education and Training
Peer Tutoring	Trained or untrained company employees who assist co-workers with their studies
Preparation Classes	Upgrading in English and/or mathematics to prepare for further education or employment
Time Sharing	Employers give a specified amount of work time and employees give their personal time to attend a workplace education class
TNA	Training Needs Assessment
Tutors	Trained tutors who work with clients on a one-to-one or small group basis
WE or WEP	Workplace Education Project
WNA	Workplace Needs Assessment
W/WEBS	Workplace/ Work Force Employment and Basic Skills. - Ontario Government sponsored service that helps employers to assess and address their basic skills and diversity needs

Chapter 1

Introduction

Why Start A Workplace Education Project?

Introduction

Peterborough, Ontario, population 70 000, is the largest city situated in the Kawartha Lakes tourist area about one and a half hours northeast of Toronto. The economy of the region centres on tourism and agriculture, with small to medium sized manufacturing and support industries located in the four counties of Peterborough, Victoria, Haliburton and Northumberland.

Locally, the manufacturing sector has gone through a period of downsizing during the past six years. This trend has begun to level off, with efforts now focussed on re-structuring and re-training existing staff to meet production demands. Moves to computerized or more technical equipment, job diversification, and higher entry-level requirements have created a demand for upgrading and a need to increase employee academic levels. At the same time, small specialized companies (electronics, printing...) are moving into the area from the more expensive larger centres like Toronto and Montreal, creating a need for well-trained employees in niche-employment markets.

The general interest in workplace education was noted by Labour Adjustment Initiative staff who were arranging classes for employees affected by downsizing. The need was confirmed in a survey conducted in 1992 by Kawartha Skills Development Committee. The climate was ready for the introduction of a co-operative community effort to broaden the educational opportunities available to the employed.

In 1993, a co-ordinator was hired to direct the efforts of community education providers as they sought to expand existing opportunities for working people to continue their education. Initially, inventory was taken of existing educational providers and classes.

Rationale

In Peterborough County, a wealth of opportunities existed to increase education. However, the following reasons suggested a need for a co-ordinated community approach:

- ◆ Only two classes were located on-site.
- ◆ Shift work eliminates possibility of regular attendance at night school.
- ◆ Only 50% of workers interviewed knew about any adult education. Most of those, named only the college and the school board.
- ◆ Many workers are anxious about contacting institutions to return to learning, especially if their experiences in the past were unpleasant.
- ◆ Only the largest companies could expect to have enough employees to begin classes within their own organizations. Economically, fifteen people are preferred. Smaller companies would need to shut down production if they were expected to have fifteen employees “off the line” at any given time.
- ◆ Unions and management may be aware of educational needs within the company but do not know the steps to implement the needed upgrading, or how to identify employee needs.
- ◆ Workers are often reluctant to divulge educational concerns to Human Resources personnel. They may feel more comfortable confiding in a neutral professional.
- ◆ A neutral co-ordinating service ensures that the needs of the client are addressed. The emphasis is employee-centred as opposed to ensuring that existing classes are full or that particular courses are promoted.
- ◆ Companies may have specialized training needs for one or two people. Costs for training individuals could be prohibitive. If a need is known by a co-ordinating body, advertising within similar companies could establish a group large enough to make the training feasible from the point of view of the provider and the businesses involved.
- ◆ Workplace education efforts create jobs! Opportunities to create new classes and part-time hours for instructors have been outcomes of our work.
- ◆ Employees, when asked, are often unaware of company policy around tuition refunds and eligible courses.

Local Activity

The chart on page 5 outlines the activity that resulted from the implementation of a community partnership model for workplace education.

LOCAL ACTIVITY

Accountability, Data, Reporting, Advisory Group, Program & Course Evaluation

- Community survey and analysis
- Co-ordinator hired
- Establish steering committee
- Set up office
- Research:
 - legislation
 - interested parties, potential partners and providers
 - funding sources
 - examples of promotional materials
- Develop potential model
- Began development of publicity material
- Controlled Marketing/Promotion
- Meet with providers for information sharing
- Meet with company and union representatives
- On invitation, begin to discuss:
 - implementation of WE process
 - time element variable
 - flexible and needs-based
 - assessment of company and individual needs
- Referral/provider meeting, co-ordination of classes, instructor liaison
- Collaborative evaluation process
- Revisions, adjustments and actions based on evaluation

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More formal tracking (pending funding)

Peterborough County Manufacturing and Business
Victoria County Manufacturing and Business
Peterborough County Health Care Sector
<ul style="list-style-type: none"> • Related community involvement • Cost Analysis • Newsletter articles in local, and national publications • Respond to North American inquiries • Begin data base/tracking (research) • <u>Instructor workshop/liaison</u>

Chapter 2

Determining
a
Focus

Key Components

Neutrality is the key feature of a successful workplace education model. Having a neutral location, funding and co-ordination is important to both educational providers and businesses. It develops credibility and allows all providers the opportunity to become aware of workplace activity. All stakeholders value the client-centred approach which encourages providers to design programs specifically for the clients.

The following five steps were helpful:

1. **Develop an interest group** to spearhead the initial activities of calling meetings, informing stakeholders, and determining community need. This might include members of the target groups (manufacturing), association representatives, administrators of local education providers, and union representation.
2. **Determine community need within the target sector (s).** In our case, Kawartha Skills Development Committee, the local community industrial training council, took the lead role in surveying the manufacturing community to determine the need for training, upgrading and literacy skills.
3. **Research sources of funding** to support co-ordinating activities.

Sources to consider:

- Canada Employment Centre - Human Resources Development Canada
- Provincial Government literacy initiatives
- Municipal - Provincial - National Foundations
- Sectoral funding
- Employer funded - perhaps through association
- User - pay
- Education - partnership

4. **Hire a co-ordinator** to continue activities initiated by the interest group.
5. **Establish Steering Committee** which may include members of the interest group.

Consider for inclusion:

- co-ordinator
- union representative
- graduate or class participant
- manufacturing/target group representative
- workplace instructor
- skills development or training council representative.
- company management representative. - human resources
- marketing expert

Membership should be for a set term (1-2 years) and be evolutionary. This will allow the steering committee to grow and change as different community needs develop.

Initially we included local education providers. It soon became clear that it was difficult for providers to be neutral. We then developed a policy which excluded providers from the steering committee but included them at provider meetings when activity was identified.

Role of Steering Committee in Setting Up a Program

1. Establish reporting mechanism and procedures.
2. Develop a work plan for first phase period. (See Sample Work Plan-page 14)
 - ◆ Maintain flexibility in workplan development. Timing will be determined by your clients.
 - ◆ Be aware of and responsive to changes in the workplan as activity develops. For example, requests may come from sectors other than those initially targeted.

3. Assist in acquiring office space and organizational set-up. (e.g. we rent space but have use of donated meeting and training space)
4. Determine business name and logo. Have business cards printed immediately.
5. Determine goals for the project.

Goals of the Workplace Education Project

Administration/Co-ordination

- ◆ To market and co-ordinate the services of the Workplace Education Project.
- ◆ To assess the upgrading needs of employers and employees in the area, as required.
- ◆ To co-ordinate companies and providers in order to deliver needs based courses.

Learning for the Workplace

- ◆ To provide benefits for employees such as greater employability, job comfort, enhanced skills and self-esteem.
- ◆ To provide benefits for employers such as a more competitive, safe and productive work force.

Life-Long Learning

- ◆ To stimulate work force interest in ongoing/life-long learning.
- ◆ To develop a comprehensive education continuum and curriculum for the local work force.
- ◆ To build community partnerships.

6. Determine project expectations and success indicators.

Indicators of Success for the Workplace Education Project (WEP)

As developed under ABC Canada direction (Sue Folinsbee and Mary Ellen Belfiore)

From the point of view of the three stakeholders listed, the following are indicators of a successful Workplace Education initiative.

Community

- ♦ There are a variety of workplace educational programs in progress.
- ♦ There is a win-win philosophy for all concerned.
- ♦ The WEP is a permanent but fluid fixture supported by government, employers and employees/unions and has more satisfied participants than it can handle.
- ♦ Participation in and public awareness about the WEP is increasing.
- ♦ Strategies have been developed to address gaps in the WEP including more partnerships.

Employees

- ♦ Employees say they have rediscovered the “joy of learning” and are pleased with skills learned.
- ♦ They recommend programs to other employees.
- ♦ Many are accessing further training.
- ♦ Learners use new skills on the job to advance or enhance level of performance.

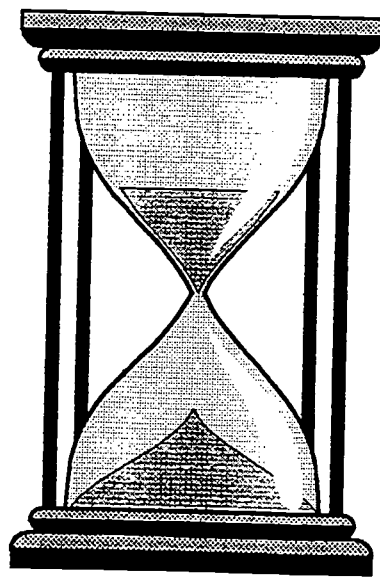
Employers

- ♦ Companies recommend the WEP to other employers.
- ♦ Employers re-invest in the WEP
- ♦ Joint-committees are forming partnerships to facilitate training.
- ♦ Employers have increased knowledge of program available through HRDC and are using the services of HRDC more.

7. Design an “incremental” publicity package into which new material can be added. See Chapter 6 - *Getting the Word Out*

8. As project develops, advise co-ordinator in areas such as:

- Marketing techniques
- Funding sources
- Companies to contact
- Publicity efforts
- Resolution of issues
- Promotion of the project



Interest Groups/Stakeholders Involved in Workplace Education

Employers

- Manufacturers
- Other businesses
- Local business and training committees
- Chamber of Commerce
- Human Resources Department

Employees

- Program participants (tutored and in programs)
- Interviewees who do not join classes
- People assessed but not in programs
- Participants who withdraw from classes
- Graduates

Education Providers

- Community-based Literacy Organization
- Board of Education
- Instructors
- Community college
- Private trainers
- University

Funders

- Provincial Governments
- Municipal Governments
- Federal Government
- Other Sources

Other Organizations

- Manufacturing Association
- Training Council
- Literacy network
- ABC Canada
- Ontario Skills Development Office
- Service Clubs
- Human Resource Association
- Apprenticeship Branch

Unions

- Labour Council
- BEST

Workplace Education Staff

Sample Work Plan

Week	Anticipated Activity	Progress to Date
Week 1	Research and orientation; meet funder - Canada Employment Centre; meet local company representatives; meetings with industrial training committee, manufacturing sub committee	
Week 2	Orientation continues; continue contacts with community agencies, labour council, company representatives	
Week 3	Visit individual providers; collect and compile information about existing courses. create list of contacts.; visit 3 local companies (which indicated interest in initial survey); collect sample brochures, begin developing publicity materials	
Week 4	Design brochures, logo, and information sheets; continue company contacts meet Apprenticeship Branch representative, Ontario Skills Development representative; presentation to joint committee of local company *Note dates of local shut-downs and holidays of contact people	
Week 5	Continue to collect information regarding manufacturing base; prepare employer and employee survey forms (organizational needs assessments, training needs assessments.); continue company contacts; conduct training needs assessments as required	
Week 6	Preparation of publicity packages; continue company and provider contacts	
Week 7	Controlled mail-out of publicity packages (those companies already contacted, geographic area of those contacted); follow-up phone calls; schedule meetings; continue management/union meetings	
Week 8	Continue management/union visits; employee presentations as required; training needs assessments as required; professional development with ABC Canada	
Week 9	Advisory committee meeting; report to other interested groups; company training needs assessments as required	

Sample Work Plan

Week	Anticipated Activity	Progress to Date
Week 10	Report to project start-up group; follow up meetings with companies contacted by mail and phone; assessments as required; provider contacts	
Week 11	Continue provider contacts; continue company contacts	
Week 12	Providers called together to discuss provision of computer course for local company; follow-up calls to companies contacted; co-ordinate identified employees to a second company's high school credit class	
Week 13	Compile data on employees assessed (for annual/monthly report); co-ordinate identified employees to existing workplace high school credit class; assessments as required; continue meetings with community groups and providers (collect resources for reference files); labour/management meetings as required	
Week 14	Computer proposals due to company; assessments as required; provider contacts and resource collection; professional development as available; network meetings	
Week 15	Begin instructor liaison-meetings and class visits; Present at OSDO staff meeting.	
Week 16	Continue company and provider contacts	
Week 17	Continue company and provider contacts	
Week 18	Liaison with providers, companies, community agencies	
Week 19	Continue company and provider contacts	
Week 20	Mail out publicity packages to 5 more companies; continue provider liaison; computer class begins at college for 2 companies - partnership; assessments as required	24

Sample Work Plan

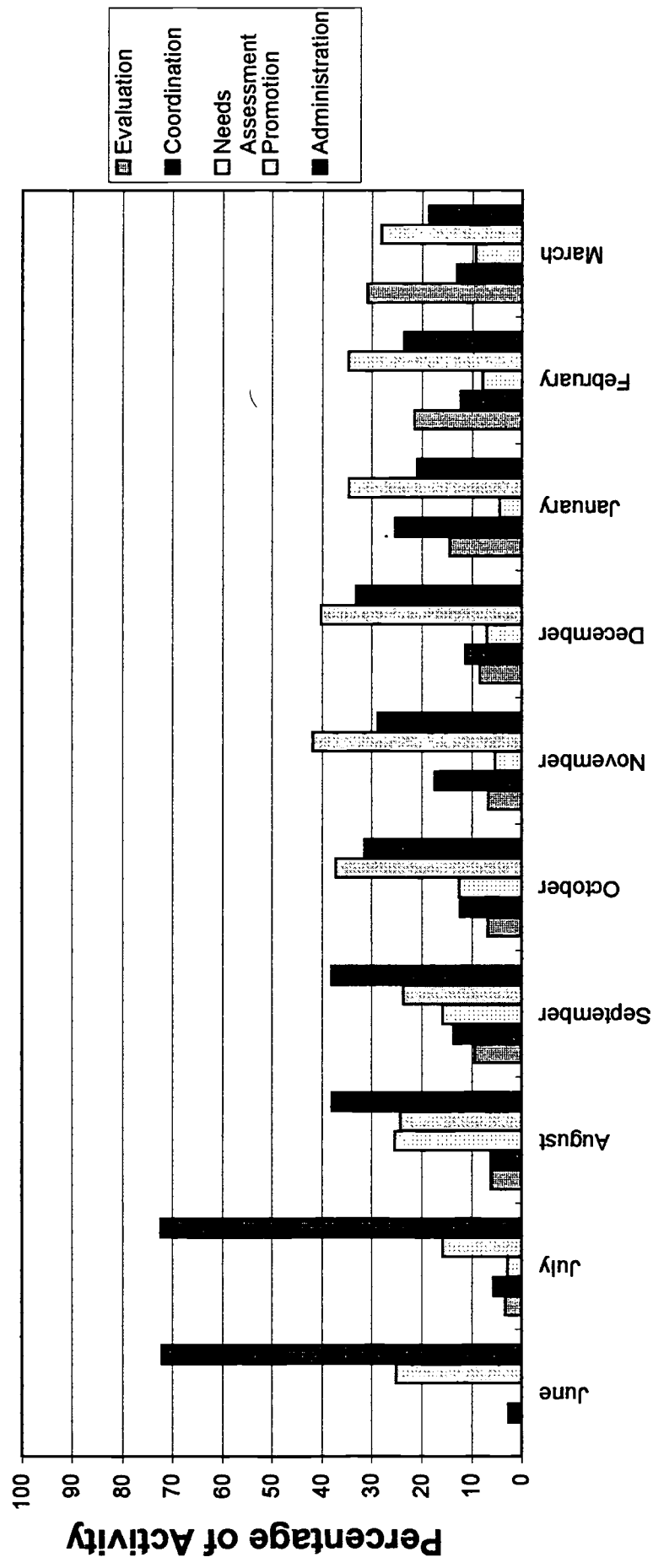
Week	Anticipated Activity	Progress to Date
Week 21	Provider meeting to establish a preparation class; assessments as required; follow-up to publicity packages sent; mail outs to 5 more companies; instructor liaison-computer instructor	
Week 22	Preparation for ABC evaluation workshop; high school class arrangements for company; distribution of evaluation questionnaires; call backs to 8 companies; publicity information prepared for local newsletter	
Week 23	Call backs to 8 companies; evaluation workshop preparation; respond to requests for information; welcome 2 new business contacts at steering committee meeting	
Week 24	Evaluation workshop - Sue Folsinsbee, ABC Canada; company follow-ups	
Week 25	Steering Committee; performance evaluation of co-ordinator by supervisor and steering committee; instructor liaison college, high school; continue company contacts	
Week 26	Meet college upgrading co-ordinator; classes (preparation and high school credit) begin at company; continue company contacts	
Week 27	Follow-up with companies; planning activities and workplan for next phase	
Week 28	OFFICE CLOSED	
Week 29	Begin funding proposal; classes resume; employment services meeting	
Week 30	Steering committee meeting; assessments as required; follow-up with companies contacted; preparations for evaluation workshops	
Week 31	Two day evaluation workshop directed by ABC Canada; introductory computer class finishes	

Sample Work Plan

Week	Anticipated Activity	Progress to Date
Week 32	Visit workplace grade 11 class; company meeting; evaluation team meeting	
Week 33	Begin team/collaborative evaluation; visit workplace preparation class	
Week 34	Meet literacy co-ordinator; company contacts and follow-up	
Week 35	Literacy Network meeting; employment group meeting; assessments as required; evaluation team letters and work packages sent out	
Week 36	Company contacts; team evaluation co-ordination	
Week 37	Collect evaluation data from team members; begin summary of raw data	
Week 38	Distribute draft summary to team members	
Week 39	Collection of data and organization for project final report	
Week 40	Final Report; analysis of evaluation data; team meeting	
Week 41	Continue evaluation preparation - recommendations and conclusions	
Complete project report to funder	Each month could include	
•	any statutory holidays	
•	scheduled vacations	
•	staff meetings	
•	steering committee meetings	
•	monthly reports/preparation	
•	regular meetings with staff/supervisor or Board	
	*This plan is based on our actual activity during the first phase (9 months) of the project. The original workplan contained many blanks which were filled in as activity developed.	

The following is a chart of the allocation time spent in start-up activity. The majority of the time spent initially will focus on administration and promotion. The Workplan should allow time for this necessary groundwork. It is unreasonable to expect company activity to begin before significant work in these areas has been accomplished.

**Co-ordinator Education Project
Graph of Start-up Activity**



Months	June	July	August	September	October	November	December	January	February	March
Evaluation	0	3.4	6.2	9.5	6.9	6.7	8.5	14.4	21.5	30.9
Coordination	2.7	5.8	6.2	13.5	12.2	17.3	11.2	25.4	12.2	12.9
Needs Assessment	0	2.9	25.4	15.6	12.4	5.4	7.1	4.6	7.9	9.4
Promotion	25.2	15.6	24.3	23.8	37.2	41.9	40.2	34.6	34.7	28.2
Administration	72.1	72.3	37.9	38	31.3	28.7	33	21	23.7	18.6

Chapter 3

Approaching
Different
Sectors

Approaching Different Sectors

The initial focus was determined by the manufacturing group which conducted the interest survey within the manufacturing sector.

Manufacturing Sector

The manufacturing sector is changing rapidly to respond to today's economy. Many companies are in the process of downsizing. Employees are required to accept additional responsibility and to adapt to changes in their job description quickly and effectively. Thus many employers are focusing on the soft skills such as the ability to make decisions and to work as part of a team. These are some of the basic skills that they want their employees to have, in addition to basic literacy and numeracy.

Additionally, many manufacturing jobs require employees to have more education than was required 20, 10 or even 5 years ago. For a long time, Grade 12 has been the minimum educational requirement. Today, some companies are refusing to accept entry level employees who do not have at least a college diploma. In such cases, existing employees are being asked to upgrade to the entry level requirement.

Employees are expected to have an increasing knowledge of computers and their applications. Not only are employees using computers more on the job, but they are also using them in their personal lives. When asked what educational opportunities they would like to pursue, employees will often say computers. This is a common request in the manufacturing sector.

While manufacturing was the primary target group, the project was always open to other interested businesses.

Health Care Sector

Health care organizations showed interest in developing opportunities for employee upgrading to a grade twelve level. Because of shift work and low numbers attending from the sponsoring organization, an evening class was set up at the facility and the courses are attended by members from several organizations in the health care field. Not only does this foster community partnerships, but this format allows the instructor to tailor curriculum to health care interests.

Seasonal Workers

In this area, the needs of seasonal workers in tourism, forest and agriculture sectors have been identified. Efforts to meet the special time and sectoral needs of this group has been a challenge.

Why has working with seasonal workers been a challenge?

Other employment opportunities are generally not available. Employees then, usually experience layoffs for the winter and spring of every year. When work is available, work hours tend to be long and intense making educational opportunities which were begun in the off season difficult to continue.

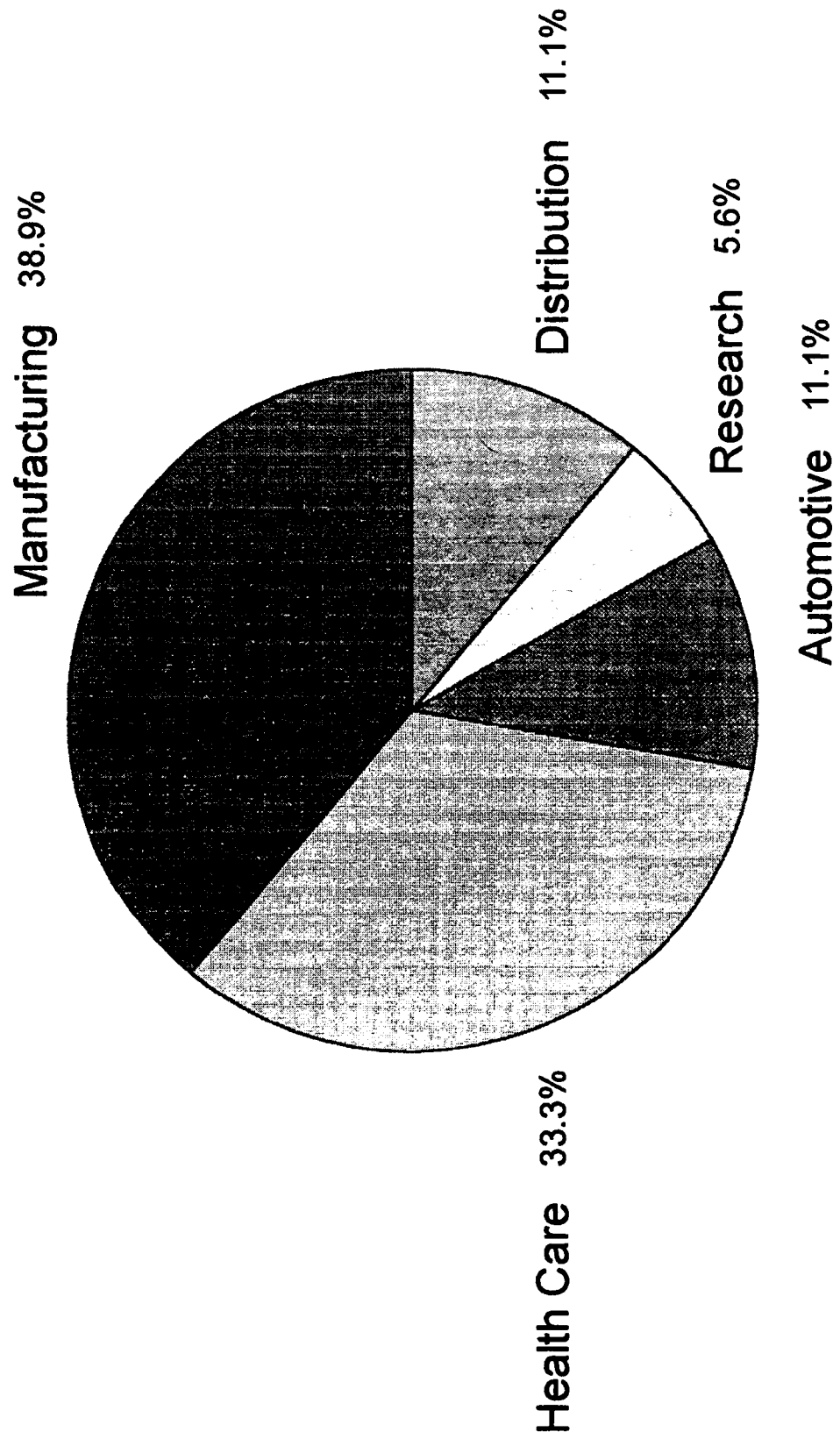
Under provincial funding (Workplace/Workforce Employment and Basic Skills), we have been able to pilot a project, the purpose of which is to design a model for the implementation of workplace programs in regions where seasonal work is common. Further information on the progress of this project can be obtained from Literacy Ontario Central South.

Areas for expansion

- ◆ Service sector
- ◆ Retail Sector

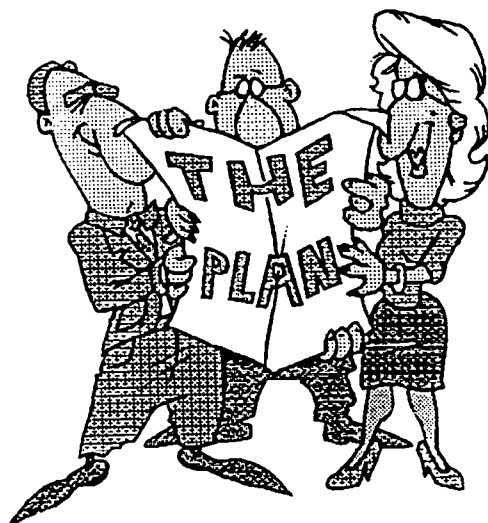
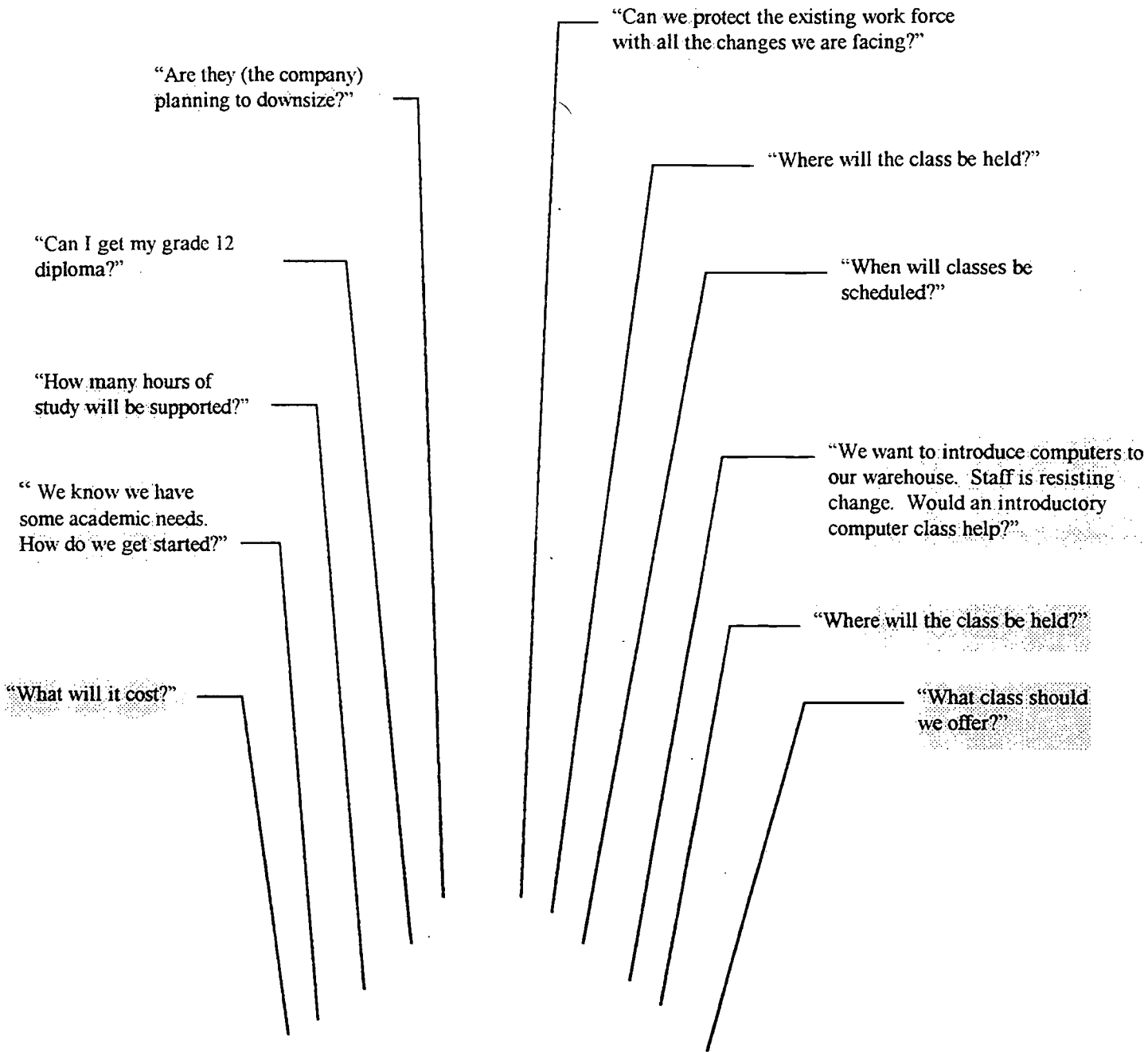
If a workplace program is considering approaching or marketing to another sector, initial time could be spent researching common interests, possible ideas for programming, and time lines within that sector. This may help the workplace project to develop an approach specific to the targeted sector and increase the likelihood of good service.

Sectors Involved



Chapter 4

Implementation Process



Initial Contact

First contact with a company may be by mail, by phone, as a result of a formal marketing process or by referral. After initial contact, an appointment is made to set up an informational meeting.

Information Meeting

Ideally, the information meeting will be with representatives of management, union/employee group or the joint committee of the company. The content of the meeting generally includes background, process, success stories, co-ordination services, tendering/consensus models and follow-up activities. Publicity packages are distributed and questions are encouraged.

If union or employee representatives are not present at the first meeting, a second meeting with these groups is requested. The need for everyone to be behind the project and for everyone to be working with the same information is explained.

Workplace Needs Assessment

In all companies with which we have worked during the history of the project, workplace needs assessments have been done internally by private consultants or by provincially funded consultants. General academic needs have been identified prior to our being involved. If an organizational workplace needs assessment is required, we are prepared to do this. Even if a workplace needs assessment has been completed, we conduct an employer survey (see sample survey on page 30) to determine some basic information about the company and to have, in writing, a record of classes or areas of education supported by the company. In order to ensure program success and appropriate client -centred course delivery it is crucial that companies begin with an overall needs assessment. For more information see *Collaborative Needs Assessment - A Handbook For Workplace Development Planners* by Sue Folinsbee and Paul Jurmo.

Once the company has decided what action it will take in terms of upgrading, the supported activities are then communicated to employees in the form of an employee memo.

This model, based on our experience, was developed to answer the question, "How do we get started?"



Presentations to Employer and Unions

Information to Employees

Confidential Employee Interviews

Research

Research

Direct Referrals to Existing Education and Training

Coordinator prepares confidential report to the company

Referrals to Support Services as Requested

Coordination of Provider Service

WE Liaison with Instructors

Private Sector

Not for Profit Community Providers

Boards of Education

Community Colleges

Universities

Community Literacy Organization



Workplace Education Project
P.O Box 182 Peterborough, Ontario K9J 6Y8

EMPLOYER SURVEY

Company Name: _____
Address: _____ **Phone:** _____
_____ **Fax:** _____

Canada Employment Center/ and Workplace Work Force Employment Basic Skills funds the Workplace Education Project.

1. Number of employees-Full-time _____ Part-time _____ Seasonal _____
2. Products manufactured _____
3. Union: Yes _____ No _____ ; Name of Union _____
4. Has a survey of the educational needs/interests of the employees been conducted within the last year? yes _____ no _____
5. Is there a summary of survey results available to the Workplace Education Co-ordinator?
Yes _____ no _____
6. As an employer, what educational skills would you like your employees to develop? (Check as many as apply)
 - a) basic mathemativs (computation, use of fractions, decimals, percentages, discounts, rate/ratio, graphing, metric measurement) _____
 - b) reading/writing/speaking _____
 - c) English as a second language _____
 - d) completion of high school diploma (gr. 12) _____
 - e) computer keyboarding _____
 - f) use of computer programmes (name these) _____
 - g) Company-specific skills or training (Identify area) _____
 - h) Safety courses (Identify area) _____
 - i) College upgrading _____ ;
College, post-secondary _____ ; University _____

7. From informal or formal sources, have any employees expressed an interest in:
- a) upgrading mathematics or English yes no
 - b) high school credits yes no
 - c) Special skill programmes (keyboarding, computers, company-specific skill....) yes no
 - d) other yes no
8. How many employees might be interested in a workplace educational programme? _____
9. If workplace education classes are established for this company, are you able to provide; (Check as many as apply)
- a) space to deliver a class? _____
 - b) use of any equipment?
 - storage cupboard or filing cabinet _____
 - overhead _____ screen _____
 - VCR _____ tables _____
 - chairs _____ black/white boards _____
 - computer _____ other _____
 - c) time-share for participants (e.g. 1 paid hour for every employee hour to a maximum per week)? _____
 - d) re-imburement of course costs upon successful completion? _____
 - e) funding for books and materials? _____
 - f) funding for instructors (for small group prep. courses)? _____
 - g) space (if seats available) for participants from another company? _____
 - h) company materials (newletters, brochures, manuals, safety instructions, application forms etc.) for course content, if appropriate? _____
 - i) employee incentives other than those listed above? _____
Please identify _____
10. From this company's viewpoint, what would be the most successful delivery of workplace education courses?
- a) on site _____
 - b) at a central location which might be in a neighboring company. _____
 - c) at the training provider's location (school, college...) _____
 - d) time _____ to _____ e.g. 3:00-5:00 p.m. _____
 - e) day(s) _____

***Note: If one-to-one tutoring is required, options to provide this service will be discussed, in confidence, with the employee.

11. What educational opportunities are currently available to your employees?
- a) on site training _____
 - b) on site tutoring (B.E.S.T., buddy system, mentoring) _____
 - c) on site high school credit courses _____
 - d) incentives to participate in courses on or off-site _____
 - e) information through newsletters, union memos, posters, or announcements about relevant existing courses. _____

Survey completed by: _____ Signature _____

Position _____ Date _____

THE WORKPLACE EDUCATION PROJECT IS FUNDED BY
THE CANADA EMPLOYMENT CENTER
AND
WORKPLACE WORK FORCE EMPLOYMENT AND BASIC SKILLS
AND
ADMINISTERED BY
LITERACY ONTARIO CENTRAL SOUTH (L.O.C.S.)
IN CONSULTATION WITH
TRENT VALLEY LITERACY ASSOCIATION
PETERBOROUGH BOARD OF EDUCATION
SIR SANDFORD FLEMING COLLEGE
AND
KAWARTHA SKILLS DEVELOPMENT COMMITTEE

Information to Employees

It is essential that ALL employees receive information about the opportunities supported:

- ◆ to avoid misunderstandings
- ◆ to offer supported activities to entire company population
- ◆ to identify individual academic needs which may be met within or outside company time
- ◆ to encourage the learning culture for everyone

We have found that sending out an employee memo to ALL employees in pay packages ensures that everyone gets the information. No group feels left out or targeted. We have been told that if it's included with your pay, it's something you should read!

MEMO TO:**FROM:** Carol Leef, Workplace Education Co-ordinator**SUBJECT:** OPPORTUNITIES FOR EDUCATION

HAVE YOU BEEN THINKING ABOUT CONTINUING YOUR EDUCATION?

ARE YOU INTERESTED IN DEVELOPING YOUR SKILLS?

ARE ANY OF THESE ON YOUR LIST OF THINGS TO DO?

- ◆ Upgrading math or English
- ◆ Completing your High School diploma
- ◆ Improving your spelling
- ◆ Developing report-writing abilities
- ◆ Improving reading comprehension
- ◆ Learning computer basics
- ◆ Polishing oral and written communication skills
- ◆ Other educational interests

If you answered "yes" to any of the above, the complete the tear-off sheet and return to _____ before _____ 199_.

Name: _____ Department: _____

Yes, I would be interested in discussing my educational interests in a confidential interview with the Workplace Education Co-ordinator. I understand that no testing will be involved in this interview, and attending this interview does not commit me to registering for a class.

Conducting Employee Interviews

Once the employee memo has been distributed, employees have the opportunity to sign up for a confidential employee interview to discuss educational goals and concerns with a Workplace Education staff member.

These interviews are very informal. A sample form has been included to offer an example of information that may be useful. Generally the interview gives the employee the chance to discuss past work experiences, past education and training, and future educational goals. These interviews usually last approximately 30 to 45 minutes and should be conducted in a private room with a door to ensure confidentiality.

If there are a number of interviews, it is useful to schedule them consecutively. A company employee usually does an excellent job scheduling the interviews and making certain that employees are on time for their interviews. In order to schedule consecutively, it is a good idea to conduct them over a shift change to see as many employees as possible. Employees and employers appreciate this flexible approach as it reduces any disruptions within the work environment.

Depending upon the shift schedule, this could mean very strange hours for the interviewer. WE staff in Peterborough have been known to work at 5 a.m. and again at 6:00 p.m. on the same day!

The educational goals and concerns of individual employees can vary greatly within a company and can come as a surprise, both to the interviewer and to the employer. However, many employees seek a way to acquire additional skills and training so that they can move up within the company. Some employees indicated goals that the interviewer may know the employer will not support financially. In such instances, the interviewer could research existing educational opportunities, preferably within the company, that the employee can pursue at his/her inclination. This information or documentation is usually sent directly to the employee's home address, again out of respect for confidentiality. Individual learning plans are prepared as required - (see examples on page 40)

WORKPLACE EDUCATION PROJECT
CONFIDENTIAL EMPLOYEE SURVEY

Name: _____ Date: _____
Address: _____ Phone: _____
Company Name: _____

Male _____ Female _____ Age Range: 16-24 _____ 45-54 _____
25-44 _____ 55+ _____

How did you hear about the Workplace Education Project?

Employer _____ Brochure _____
Union _____ Co-worker _____
Other _____

Position/work title _____ Union: yes _____ no _____

Name of Union: _____

Length of time with this company _____

First Language: _____ Other languages: _____

EDUCATION HISTORY:

Highest level completed _____ Country/province _____

Special training _____ Apprenticeship _____

Additional work-related courses First Aid _____
WHMIS _____
Computer _____

Personal interest courses _____

Do you know where courses are offered? _____

Are you attending any course(s) now? _____

WORK HISTORY:

Type of work _____ Length of Time _____

Educational Interests:

Basic mathematics _____ Reading/writing/speaking _____

High school credit courses for grade 12 diploma _____

English as a second language _____ Special workplace skills _____

Other _____

What shift(s) do you work? _____

What would be the best time for you to attend a class? _____

Do you prefer: 1 to 1 tutoring? _____ small group (5-10) _____ class (14+)? _____

Learning Styles:

When learning something new, do you learn best by:

1. doing - trial and error? yes _____ no _____

2. watching someone else? yes _____ no _____

3. reading instructions? yes _____ no _____

4. following directions or
information given orally? yes _____ no _____

5. a combination of ways?(name them) _____

Assessment techniques used:

Interview self-assessment _____ Math inventory _____

Writing sample _____ Communications inventory _____

Barriers:

Child care _____ Elder care _____ Transportation _____ Other _____

Summary and Notes:

Goal _____

Suggested starting _____

point _____

Are you willing to be contacted at regular intervals for continuing support and follow-up
information? yes _____ no _____ Best time & number? _____****I understand that this information is confidential, and that only non-identifying general
summaries or statistical information will be given to the company, union or education provider
until I am prepared to register for a class.

Signature: _____

MATHEMATICS

Whole Numbers

- four operations
- counting-by 1's, 2's, 5's etc.
- other systems (Roman Numerals, other bases)
- estimating
- using money, giving change

Fractions

Ratio and proportion

Decimals

Percents/discounts

Metric measurement

- use of measuring devices
- converting units
- common applications

Graphing

- creating -pie/circle, bar, line, combined
- uses of each
- reading and interpretation

Charts, Timetables, Schedules, Maps

- reading
- calculating distances
- creating

Geometry

- basic shapes
- perimeter
- area
- formulae

Integers/algebra

COMMUNICATIONS

GOOD FAIR NEEDS IMPROVEMENT

Reading

Spelling

Handwriting

Punctuation

Grammar

Writing

Sentence-writing

Paragraph writing

Memo-writing

Report-writing

Business letters

Personal writing
(letters, notes,
cheques etc.)

Other

NAME:**ADDRESS:****COMPANY:****AGE RANGE:** 25-44

Social Insurance Number (if on unemployment insurance)

BACKGROUND INFORMATION:

- cross-trainer; 14 years with company
- background in factory work
- works days

CURRENT SKILLS/ACADEMIC HISTORY:

- grade 12 + Red Cross Level II Homemaker
- reads for enjoyment (books, novels, magazines etc.)
- some words cause a "block" when saying them aloud
- some words come out "backwards" which causes embarrassment
- avoids reading aloud in public situations

GOAL: Improved pronunciation skills for oral reading & conversation.**SKILLS REQUIRED:** Practice with oral reading to develop confidence and word attack skills for correct pronunciation. Develop vocabulary, knowledge of phonetic sounds, and use of dictionary pronunciation keys.

Spelling development would go along with the above skills.

PREFERENCES (IF ANY): Would like a tutor to meet specific needs. The best time to meet would be after 6:00 p.m.**SUGGESTED APPROACH:**

Call Literacy Association phone number to arrange for a personal tutor for 2 hours per week for as long as necessary to:

- develop knowledge of phonetics;
- apply this to oral reading of a variety of materials;
- introduce use of pronunciation/phonetic key in dictionaries;
- develop vocabulary through suffixes and prefixes on know root words;
- provide opportunities for general oral work and conversation where pronunciation can be corrected without embarrassment.

NAME:**ADDRESS:****COMPANY:****AGE RANGE:** 25-44**S.I.N.:** (if on unemployment insurance)

U.I. needs consideration when registering for class.

BACKGROUND INFORMATION:**GOAL:** Re-employment

-Polisher at _____ for 20 years

To improve English and math skills.

-has done machine shop and assembly

Grade 12 diploma

-worked on plating and spray painting

-has farming experience

-interested in Scouting

CURRENT SKILLS/ACADEMIC HISTORY:

-completed grade 9

-on-the-job training for all work experience

-English is first language

-Has taken health and safety course

-took CAAT; frustrated by timed test

-feels comfortable using a calculator

SKILLS REQUIRED:

-a review of reading and writing skills

-computer exposure

-review and develop math skills to the introductory algebra level.

PREFERENCES (IF ANY): Would like afternoon small class to review English skills and concentrate on math skills to enhance chances of getting employment. Would like to continue to study in an evening class if employment is found during the afternoon. _____ feels that computer skills would be a big help. He is on vacation March 11-18 and then again for a week at the end of March.

SUGGESTED APPROACH:1. Stage 1: Small group for 5 hours per week for an initial period of 16 weeks to:

-review reading and writing skills;

-exposure to the use of a computer;

-application of these skills in relation to employment search and practical uses (completing application forms), where possible.

-develop confidence and skills in speaking with the small group.

-review mathematics with emphasis on, estimating, fractions, ratio, proportions, percents, decimals, metric measurement, reading charts/ timetables, graphs.

2. Stage 2: Evaluate progress to determine whether _____ feels prepared to enter credit/computer class. If more preparation is required, make information available about up-grading and tutoring possibilities.

Report to the Company

All interests, whether personal or work related are submitted to the company in the form of a report, unless otherwise requested. No names are used in the report - only subject area and numbers of interested employees. Essentially, the employee interviews represent the first step in an information gathering process.

See sample "Summary of Employee Interviews" on pages 43 and 44.

It is often a good idea, if it can be arranged, to present the findings contained in the report during a personal visit to all interested parties. This usually includes management, union representation and the training or education committee. In addition to general area of interests, the report may also make recommendations as to what education or training opportunities the company might offer.

Once the report has been made, the company will make decisions regarding which action is to be taken and when. Several factors can influence this decision-making process such as shut downs, vacation schedules, production schedule and fiscal year end dates. For businesses, business comes first and they often operate on their own timeline. Once the decision to proceed is made, and the company has agreed to offer academic upgrading to its employees, workplace education staff prepare to attract the best possible providers for that training. This may be done either through implementing a tendering process or by achieving consensus.

On several occasions it has been eight months between the information meeting and the actual start of classes. The shortest turn around time has been six weeks.



Workplace Education Project
P.O Box 182 Peterborough, Ontario K9J 7X6

REPORT TO:

FROM: Carol Leef, Co-ordinator, Workplace Education

SUBJECT: SUMMARY OF EMPLOYEE INTERVIEWS

GENERAL- On September 13, September 16, and September 20, 199__, I met with a total of 10 individuals who expressed an interest in continuing their education.

All participants in the interview process were appreciative of the company's offer of opportunities to continue their education and of the chance to speak privately about their own educational interests or concerns.

After the initial interviews on September 13, it is my impression that those with whom I spoke encouraged co-workers to make appointments.

RESULTS-

GRADE 11 MATHEMATICS

6 People

GRADE 11 ENGLISH

<-3 of those prepared to begin with Math 11 would also be prepared to begin with English 11 if that was the course selected as the starting point.

UPGRADING/TUTORING

5 people (one of whom is listed in the English/Math lists) have indicated that small group or individual tutoring will be necessary or advantageous before beginning a credit course. Tutoring information has been give to those requesting it, but they would also consider working together in a small group.

OTHER INFORMATION

Two people have special situations related to achieving grade 12 diplomas. These people have received the information by telephone or letter to make them aware of processes or contracts for more detailed answers to their questions.

SUGGESTIONS - Since almost equal numbers of employees are interested in preparation classes and Grade 11 Mathematics, the suggestion would be that I continue to survey nearby businesses to determine if there is interest in either of these areas. If 14 people are found to participate in Grade 11 Mathematics, no direct costs for delivery of classes will be involved.

Alternatives for possible delivery of a small group preparation class through Sir Sandford Fleming College, Trent Valley Literacy Association or Peterborough County Board of Education are being investigated. Because of the special needs of those involved, it is very important to keep numbers low (10 or fewer). When information is available, I will forward it to you.

A letter of intent from "Company" regarding the Grade 11 Mathematics class (days, times, location, possible start by mid-end October) would assist me in determining the interest from nearby manufacturing companies. You may also wish to consider opening the class to spouses or adult children of your employees in order to secure 14 + participants.

I look forward to assisting with the co-ordination of the delivery process.

Selecting the Provider

We have followed two different processes for selecting a provider, depending on how delivery of service is funded.

A. The Tendering Model

Once the company has made a decision to proceed with one or more of the recommendations found in the statistical report summarizing employee needs, the co-ordinator calls a provider meeting.

All providers who offer the type of instruction required are contacted by telephone. A general description of the type of instruction, length of time and number of potential participants is given, and an invitation is extended to attend a provider meeting. Confirmation of attendance and the name of the provider representative is requested. Representatives from the company joint committee are invited to attend.

The co-ordinator of the WE project usually plans the meeting, contacts potential participants, arranges location, draws up an agenda and chairs/facilitates the provider meeting. This meeting should take no longer than one hour. Preparation of participants name cards and listing participant names and organizations in the introductions portion of the agenda provides a networking tool for participants. (see sample agenda on page 46)

One computer providers' meeting had representatives from 10 public and private trainers. All participated in the discussion of the identified needs, asked questions of the company representative and of the WE co-ordinator. Seven of the ten decided to submit a proposal to the company. Decisions not to participate were varied (instructors not available for time requested, space not available during time requested). A private trainer was selected based on flexibility to accommodate shift workers' needs. Proposals were seen only by the company and selection was made by the company.

A written summary of participant needs is supplied by the co-ordinator.

PROVIDERS' MEETING SMALL GROUP PREPARATION CLASS

COMPANY BOARDROOM
Monday, November 8, 199-
9:00 a.m.

Company Name
Address
Phone:
Facsimile:

AGENDA

1. Call to order: Co-ordinator
2. Introductions:

Company:	Representative 1	- Position/Work title
	Representative 2	- Position/Work title
Educational Providers	Representative 1	- School Board
	Representative 2	- Community College
	Representative 3	- Community Based Literacy Organization
	Representative 4	- Private Trainer

Workplace Education

Supervisor
Co-ordinator

3. Explanation of suggested process - co-ordinator
4. WE Project Role - supervisor
5. Explanation of needs assessment interviews, findings and possible course content outline (handout) - co-ordinator
6. Company representatives - outline company needs (time, time-share, concerns...)
7. Question/answer/discussion
8. Summary of action to be taken to submit proposals:
 - Address proposals to attention of: name
position
company name
address

by _____ (date) at _____ (time).

Applicants will be notified by (*phone, fax, letter*) by _____ (date)
about award of contract. Questions related to preparation of proposals
should be directed to

_____ (name) _____ (phone).

9. Adjournment

This summary can be used as a references by the education providers if they choose to prepare a proposal for the company.
(see a sample summary on the following page.)

Consensus Model

In some cases it may be advantageous to determine by the consensus model who will deliver courses. All community educational providers, whether public or private, meet to decide the best approach. Based on the co-ordinator's summary of identified needs, the providers decide which single provider or partnership of providers can best meet the needs of the clients. This model has worked locally but only with the public sector. It does require co-operation and trust among the deliverers and can be successful especially when there is a lot of upgrading activity within local companies.

Who pays for the delivery of classes?

These are examples of some situations we have encountered:

Preparation class onsite for 6 employees. Held on a time-share arrangement. Costs for delivery were shared by company, Ontario Basic Skills in The Workplace, community based literacy organization and volunteer tutors.

Introductory computer class held in a college lab. Half the instruction time was during work hours. Participants from two companies shared in the class and the companies paid their share of the total costs.

Individual paid tutoring for four hours per week. Half the tutoring time is held during working hours. Costs are shared by special HRDC funding and the company. In order to generate the company's share, the human resources manager offered a marketing workshop to business people in the community, charged a fee, and used the profits to pay the tutor.

One high school class has participants from several health care organizations. To simplify administration, individuals pay a fee for each course taken. Some have the option of submitting receipts to their organizations for reimbursement. Others prefer to pay and maintain the confidentiality of their attendance.

PREPARATION CLASS

Potential clients - 5 or 6

Time - 20 weeks at 4 hours per week = 80 hours

Background-zero high school credits to some high school credits.

Goals - each participant would like to go on to complete high school credits for a grade 12 diploma.

PROPOSED TOPICS BASED ON ASSESSMENT - INTERVIEWS

General

- Learning styles inventory for student/instructor awareness;
- Confidence building exercises;
- Note-taking and study skills;
- Time management related to class work, assignments and study.

Mathematics

1. Basic operations - adding, subtracting, multiplying and dividing; counting by 2's, 5's, 10's, etc.; place value, writing numerals in words and writing numerals from words, identifying patterns of numbers; estimating; rounding off, Roman numerals (identification of symbols);
2. Use of a calculator;
3. Ratio and proportion
4. Fractions - adding, subtracting, multiplying, dividing;
5. Decimals - as above, use in money, making change;
6. Percents - meaning, writing, as %, decimal, fraction; common uses in interest, discounts, sales tax, G.S.T....
7. Metric measurement - units, measuring devices, changing from one metric unit to another (use of decimals and place value) common applications, names of common geometric shapes, area, perimeter, use of formulae.
8. Graphing - reading and creating bar, line and pie graphs.
9. Introduction to integers and basic algebra.

English

1. Spelling - rules, phonics, use of dictionary pronunciation key, practice
2. Vocabulary building - from work, outside interests, newspaper, radio, television, sources used frequently. Could also use prepared vocabulary-building materials. Relate this to spelling work.
3. Writing skills - basic grammar, parts of speech, sentence types, punctuation, short paragraphs (as related to participants' experience - short notes, letters, complaints, forms, suggestions to supervisors, minutes from meetings...) Application of writing skills in a variety of formats - daily journal, sentences, paragraphs, timed writings, notes for child's teacher, letters, note-taking from written points, notes from oral source etc.)
4. Oral and silent reading-discuss the different types of reading material on a regular basis. Compile a display of examples. Categorize the samples and discuss differences between them. What problems are there in reading each type? Why are some easier to read than others? Methods of reading each type. Comprehension skills-oral and written.
5. Speaking skills - informal settings, casual discussion, presenting prepared answers, one-to-one, in group, presenting an opinion, conducting a meeting, offering a suggestion-role play, informal debate

Starting the Class

Once a provider has been selected, the co-ordinator confirms dates, times, and locations of classes with both the company and provider. Find out the name of the instructor.

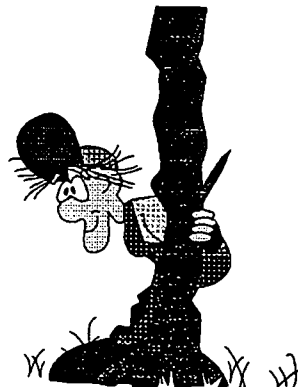
When initial details are confirmed, the information is sent to all employees who expressed an interest and posted for information (general staff interest and to give another opportunity to anyone who did not come forward earlier) within the company.

Information letters should include:

- ◆ Location
- ◆ Dates and times of classes
- ◆ Start - End dates
- ◆ Parking arrangements (especially for outside-company participants)
- ◆ Map
- ◆ Entry security process
- ◆ Instructor name
- ◆ General outline of participants - which companies or departments
- ◆ Equipment needed
- ◆ Any special instructions regarding absence, transcripts, refreshments, costs (see examples on following pages)

Suggestions for co-ordinators

Attend the first class. Meet the employees at the door. Walk in with them and make introductions to the instructor. Welcome them. Wish them good luck.....Leave!



Instructor Liaison

It is a good idea to meet with the instructor prior to the first class to:

- ◆ Give information about company - brochures
- ◆ Explain background of establishing class
- ◆ Describe general needs of participants (same hand out as provided at provider meeting)
- ◆ Give a class list
- ◆ Explain co-ordinator role (past and on-going)
- ◆ Arrange introductions to appropriate company contacts and tour instruction area (company too, if it can be set up)
- ◆ Emphasize the importance of the instructor to success of the project.
- ◆ Make instructor aware of WE resources available.
- ◆ Include on contact list for workshops, conferences, professional development.

One of the WE instructors began in a workplace setting because no regular school position was available. This instructor now works with adults in three workplace education classes, serves on our advisory committee and plans to continue a career in adult education. His flexible and creative methods make him a very popular instructor. The employees are actively recruiting more participants to ensure that classes continue to be offered.

ENGLISH 11 COURSE PARTICIPANTS

WHERE? Name of Company
 Street Address
 Room Number

WHEN? Tuesdays & Thursdays 7:00-9:00/9:30 p.m.

FIRST DAY Tuesday, September 12, 95

PARKING? Employee parking lot

ENTRY? Main door off the parking lot.

MAP TO CLASS LOCATION

INSTRUCTOR'S NAME

WHO WILL BE IN THE CLASSES
 (List companies)

WHAT EQUIPMENT IS NEEDED?

English 11

1 ½ inch binder

lined paper

pens, pencils, erasers

Texts will be supplied

* For those working on this course toward a grade 12 diploma, please arrange to have your high school transcript available for maturity credit evaluation (if this has not already been done) by a representative of the Board of Education. This will take place in November.

Employee Memo

After the Hunt...

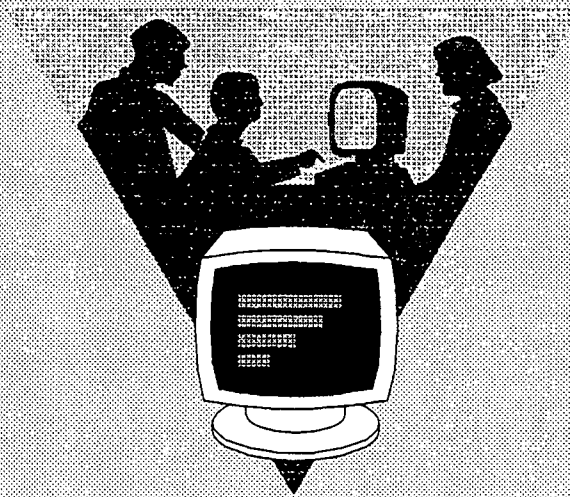
The Training Committee and Workplace Education are pleased to be able to offer an introduction to keyboarding and the computer.

Anyone who would like to join this course is welcome to register.

The class will be on Wednesdays, beginning November 23rd. An instructor will be available from 3 - 5 pm.

The Training Committee is considering the possibility of opening up courses to employee spouses if there is a demand. Please indicate if your spouse is interested when you register.

In addition, please be aware that plans are being made for advanced computer classes to begin within the next couple of months.



* Please give your name/and or the name of your spouse to the Training Committee to sign up by November 11th.

Chapter 5

Gathering
Information

Gathering Information

Because of the variety of requests for information from unions, management and individual employees, we have found it helpful to have resource material available from as many groups as possible.

As soon as Workplace Education got underway, a filing system was begun to organize the material. Information was requested by phone, letter, Alphacom, and on personal visits.

A filing system might include:

1. Separate files for each provider to maintain up to date information about services
2. Separate files for each company with whom you have contact
3. A lined sheet of paper in the file to note date, with whom you spoke, and information gathered. (This is useful back-up information if a discrepancy arises.)
4. Company files (separate from company information)
5. Clippings from newspapers and magazines
6. Contact lists - potential and those seen, with addresses, phone and fax numbers - good data base project!
7. Correspondence - copies of what has been sent out
8. Labour Market Information
9. Meeting Notes - under separate headings - steering committee, staff, regional
10. Original documents of record keeping sheets
11. Reports
12. Publicity items
13. Proposals

Providers

- Basic Education and Skills Training (B.E.S.T.) - Ontario Federation of Labour
- Boards of Education
- Business colleges
- Community based literacy organizations
- Community colleges
- Literacy networks
- Private computer trainers (a long list in our area)

- Private tutoring organizations
- Specialized training institutions (Bible College, self defense, truck driver training...)
- Universities

Information Requested

Depending on the institution or organization, the following is a list of items we have found useful.

- course calendars
- seasonal calendars
- brochures (extras to hand out to clients)
- publicity audio or audio-visual tapes
- program descriptions
- facts sheets
- resource lists
- business cards for contact people
- client description (youth, adult...)

Other Referral Agencies

- ABC Canada
- Adjustment Advisory Programs
- Alpha Ontario
- Apprenticeship offices
- Business - women's - men's organizations
- Human Resources Development Canada
- CNIB
- District Health Councils
- Employment/Career agencies
- Human resources organizations
- Job clubs
- Labour council
- Learning Disabilities Associations
- Literacy or workplace programs from other networks or provinces
- Local Training and Adjustment Board
- Manufacturing associations
- National Literacy Secretariat
- Ontario Skills Development Office
- Provincial Government
- Sectoral associations (tourism, downtown business associations)
- Teachers' Associations
- Temporary employment services
- Training councils
- Women's Access to Apprenticeship

Information Requested

(see above list of information requested from providers)

- newsletters
- funding opportunities and criteria
- meeting dates of clubs
- names of program planners (to secure invitations to present/ set up displays)

Companies

As contacts are made with new companies, and interest is shown, begin a company file.

This file might include:

- Copies of correspondence/responses
- Notes of telephone contacts (names, dates, times) and results
- Copies of brochures or company information sheets requested at personal meetings
- Photocopy of business cards of contact people
- Any newspaper clippings, advertisements, special reports or job advertisements
- Employer survey (when company decides to proceed)
- Copy of reports to company
- Follow-up, classes set-up - general activity notes

Telephone File

In addition to setting up files for providers, community agencies and companies, a telephone file could be set-up. Business cards were often used on the file cards. For those not contacted regularly “double filing” under personal name and organization often saves time later.

Information gathering and developing resource files are on-going processes. Files must be updated regularly, particularly in provider information about courses. This is simplified if organizations agree to add your project to their mailing list.

Set up an “archive” box or drawer into which to put infrequently used files. This keeps your active files easy to find.

Employee

NOTE:All employee information is confidential and steps need to be taken to ensure that employee files are kept secure. No employee phone numbers are kept in the telephone file unless he/she is also a company contact or serves the steering committee. No indication is given that the person named may also be attending a class.

All information about employees from the same company are filed under the company name (separate from company information file).

Completed employee survey forms, writing samples, skills inventories, assessment documents, learning plans and any notes related to placement are stapled together and placed in alphabetical order in file.

(See chapter 4, Implementation...for example of employee survey)

Administrative Record Keeping

This is an area that is often neglected in the rush to “do the job”. Following are some examples of record - keeping documents. You need decide whether you need to collect the information, and how you would use the results.

- Travel and Expense Form
- Invoice Form
- Record of phone calls/faxes
- Contact Sheet
- Time Spent
- Monthly Activity
- Annual Statistics

WORKPLACE EDUCATION CO-ORDINATOR:

CATEGORIZATION OF TIME SPENT (To Closest 1/4 hour) Month: _____

	9	10	11	12	15	16	17	18	19	22	23	24	25	26	29	30	TOTALS
1. Administration																	
a. Literature research																	
b. Obtaining supplies																	
c. Orientation/training																	
d. Preparing forms																	
e. Record keeping/office duties																	
f. Meetings																	
g. Travel																	
2. Promotion/Marketing																	
a. Prep. of materials																	
b. Presentations/activity reports																	
c. Initial employer contact																	
d. Phone call-backs																	
e. Labour/management																	
f. Union																	
g. Employee																	
h. Providers																	
i. Press																	
J. Special events																	
k. Thank you/follow up																	
l. Travel																	
3. Needs assessments																	
a. Employer																	
b. Employee																	
c. Scheduling																	
d. Analysing/compiling data																	
e. Company report																	
f. Course research																	
g. Individual learning plans																	
h. Travel																	
4. Co-ordination																	
a. Meetings - Co-ordination																	
- Staff																	
- Steering cmte.																	
- Regional																	
b. Scheduling meetings																	
c. Employee follow-up																	
d. Class arrangements																	
e. Instructor liaison																	
f. Travel																	
5. Evaluation																	
a. Monthly reports																	
b. Project Evaluation																	
c. Final Report																	
Total																	
Extra Time																	

DAYS TO BE WORKED IN MONTH: _____

ACTUAL TIME WORKED _____

TOTAL EXPECTED HOURS: _____

TIME BANKED TO DATE ____ = ____

Annual Statistics

COMPANY NAMES	Company A	Company B	Company C	Company D	Company E	TOTAL
Total Surveyed						
A.						
GENDER/AGE						
Male						
16-24						
25-44						
45-54						
55+						
Female						
16-24						
25-44						
45-54						
55+						
Data not collected						
B.UNION						
NON-UNION						
C. HOW PERSON						
HEARD ABOUT PROJECT						
Employer						
Union						
Co-worker						
Brochure						
Other						
D.LENGTH OF TIME						
WITH CURRENT EMPLOYER						
Less than 1 yr						
1-5 years						
6-10 years						
11-20 years						
20+ years						
Data not collected						
E. FIRST LANGUAGE						
Other						
English						
French						

Annual Statistics

Annual Statistics Continued

						TOTALS
F. HIGHEST LEVEL OF SCHOOL COMPLETED						
Elementary						
Gr. 9						
10						
11						
12						
12(OAC)						
college						
1 year						
2 years						
3 years						
University						
1 year						
2 years						
3 years						
4 years						
Apprenticeship						
Data not collected						
Placement						
Tutoring						
Small Group						
Existing upgraading						
Credit course class						
Independent Study						
Intro - computer						
Advanced computer						
College referral						
University referral						
No action at this time						

Cost Analysis

The costs involved in running a workplace education program can be quite significant, especially when indirect costs are detected and assigned a value.

There are several reasons for conducting a cost analysis of your program(s).

First, it is advisable to recognize all contributions to your program, both direct and indirect. Second, it is usually surprising to all stakeholders what the total contribution to the program(s) has been and who has borne the majority of costs.

In the Workplace Education Project in Peterborough, funders encouraged employers to pay for co-ordination costs as well as the costs for instruction. A cost analysis showed that employers, through direct and indirect costs were already funding half the costs (48.6%)

Direct costs are those which are incurred as a result of the Workplace Education Program.

Examples of direct costs:

Workplace Education Staff	<ul style="list-style-type: none"> - assessment and reporting - training committee meetings - trainer liaison - co-ordination of delivery - course follow-up
Employer Cost	<ul style="list-style-type: none"> - instruction - facilities - supplies - equipment
Delivery Agent	<ul style="list-style-type: none"> - instruction - supplies

Benefit Analysis

One of the most commonly asked questions by potential funders is “What benefits can be attributed to your project?”

It is often difficult to determine which organizational benefits are a result of workplace education programs and which are a result of other organizational changes such as the introduction of new technology, or a switch from an hierarchical structure to a team based approach. Just as the cost analysis identified some hidden costs, a benefit analysis might also be instrumental in revealing any hidden benefits which are generated through workplace programs.

In Peterborough, Ontario, the Workplace Education Project once again joined forces with the Ontario Skills Development Office to conduct a benefit analysis. OSDO was very useful in developing questions for the questionnaire.

The original intent was to conduct an analysis that would examine benefits at three different levels: the community, the company and the individual participant.

However, we had recently (within the last year) conducted a collaborative evaluation which targeted employees and through this, we gained sufficient information about how employees benefited through workplace education programs. In addition, our focus was funders. National and Provincial funding agencies and companies bear the majority of up front costs. Therefore our intent was to examine the benefits from these perspectives.

To this end, two separate questionnaires were prepared - one for instructors and one for companies involved in workplace programs. It was our hope that instructors might have some additional insight into the effects of course participation on the organization.

The following are copies of the distributed surveys.

Workplace Education Benefit Analysis Questionnaire

Employee:

Has Workplace Education helped employees to do their jobs?

If so, how?

Departmental:

Have operational goals at the department level benefited from employee participation in Workplace Education?

If so, please describe.

Organizational:

To what extent has Workplace Education helped your organization to meet strategic business goals?

Are you willing to assist us in gathering additional information? yes no

We would appreciate your response by May 31st, by fax or by mail.

P.O. Box 983
Peterborough, Ontario
K9J 7A5
fax (705) 749-0084
Attn: Tamara Riddle

Thank you for your cooperation.

Instructor Interview Questions

1. What is your involvement with Workplace Education?
2. Did you background in Adult Education?
3. Has your knowledge or attitude towards adult education changed as a result of teaching a WE class?
4. If so, please describe.
5. Have you noticed a change of any nature among employees in your class while you have been instructing them?
6. If so, please describe.
7. Are you aware of any new tasks, roles, jobs, or community (family) involvement which may have been a result of the course (s) taken?
8. As a Workplace Education instructor, have you been made aware of the company's plans for organizational change?
9. How workplace education fits into their organizational change
Purposes behind their support of the project
10. Are you aware of any organizational benefits as a result of Workplace Education?

Summary of Benefits

- ◆ Providers have been able to “tap” into the workplace training sphere
- ◆ Tendering process ensures that employers receive flexible and company - specific training. Often these employers are not aware of the number of options within the community.
- ◆ Education fairs may be presented on site
- ◆ Job retention
- ◆ Some employees become increasingly involved in the company (i.e. union) and in the community.
- ◆ Initial courses often lead to increased confidence and continued studies outside the workplace
- ◆ Increased productivity, improved morale, less absenteeism, and improved safety record may be linked to participation in classes
- ◆ Promotes community planning
- ◆ Internal promotion
- ◆ Improved union/management relations - training committees

A benefit analysis may confirm the importance of employee follow-up. Although this can be a time consuming activity, it is a valuable component which should be implemented in the start-up phase. Follow-up has not been a strength of this program, but we have recently implemented a process to provide follow-up and support.

Companies, project staff and instructors appreciate knowing from the beginning of a program what information they may be called upon to provide. Companies could then use information of this nature to justify workplace education expenditures.

The following information may be useful for statistical purposes:

- Number of employees and relatives involved in assessments
- Options presented to each individual during assessments
- Number of employees and relatives participating in classes
- Reasons assessed individuals did not participate in classes

- Follow-up information, gathered at the end of each class to indicate:
 - whether or not participants plan to continue
 - which courses they would like to consider
 - if participants would like an appointment with WE staff to discuss options

- Quantitative benefits to the company such as:
 - absenteeism from work
 - any increases or decreases in WCB claims
 - productivity trends (if applicable)

- How employees' responsibilities are covered when they are in class
- Overtime
- Cost to the company per class
- Cost to the company per individual
- In-kind donations made by the company
- Time given by management, unions and employees
- Any employee movement within the company
- Percentage of workforce involved in workplace education

Chapter 6

Getting
the
Word Out

Getting the Word Out

Early in the development of your project, it would be useful to secure a **volunteer with marketing experience** to serve on the steering committee. Expert advice can help you develop successful marketing techniques to publicize the advantages of workplace education.

Determine Your Purpose

Every publicity document or activity should serve a particular purpose such as:

- ◆ raising awareness
- ◆ obtaining clients
- ◆ providing information to companies, unions, employees and educational providers
- ◆ publicizing

Tools to Consider

- ◆ logo - the logo you select for your program should be simple yet readily identified
- ◆ colour scheme - choose a colour to use with all distributed materials to increase recognition
- ◆ business cards- should be available for distribution right from the beginning of the project/program
- ◆ publicity package - should also be available for distribution as early as possible to raise awareness of the project
- ◆ posters - to advertise upcoming classes or courses
- ◆ press releases
- ◆ employee memos - inform employees who have had an individual interview of an upcoming course in which they have indicated an interest
- ◆ newsletters
- ◆ articles about the project - can help share information about the program and its successes to various audiences such as large companies, providers, local service organizations, manufacturing associations and colleagues
- ◆ thank you notes / Christmas cards - printed with logo
- ◆ book marks - can identify partnerships
- ◆ displays - at education fairs, within individual workplaces at local associations

External Publicity

In addition to publicity that is generated by the staff of your workplace education program, consider outside sources of publicity such as:

- personal advocates**
- class participants
 - businesses
 - graduates
 - unions
 - providers
 - steering committee members

Personal letters of support from companies - these generally are unsolicited and are very powerful publicity tools particularly when trying to get new companies involved.

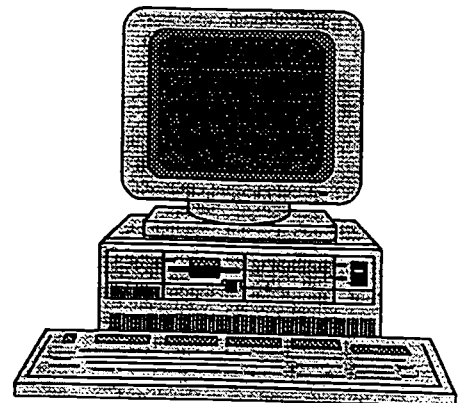
Quotations from all stakeholders - useful inserts for publicity documents such as newsletters, brochures, and articles.

The **media** can also be very useful for publicity

- radio spots
- cable TV

Computer Networking

In Ontario, literacy providers have Alphacom - the literacy networks' electronic communication system which enables them to share information, ideas, and concerns across the province. There is a conference called "Workplace" which was developed to present ideas and strategies, talk about programs and find out the level and type of workplace activity in other parts of the province.



First Contact

Presenting a publicity package is a very effective way to introduce your program to individuals, companies and community members. It is important that your package look professional. You will be dealing with business clients who expect a polished product.

You may decide to select a display folder which will allow you to add, update or tailor make the package to suit the client.

We chose a cardboard folder with double pockets and cut outs for business cards. The outside cover features our logo. These multi-purpose folders can be used for publicity packages, workshops and meetings.

Inside the display folder, consider including the following:

- ◆ business cards
- ◆ project information
- ◆ brochures for employers, unions, employees
- ◆ posters - for distribution around companies
- ◆ copies of articles about your project (get permission from the publisher before reproducing)
- ◆ resource list

Controlled Mailing

Once publicity packages are available, the temptation may be to establish a mailing list and mail them all at once.

On the excellent advice of ABC Canada, we were asked to consider how we would respond if companies requested information at the same time. Faced with his possibility, we agreed that only a controlled mailing would work. We had only one person on staff at the time.

Our controlled mailing followed this pattern:

1. Sent publicity packages to all companies contacted.
2. Sent packages to companies in the neighbourhood of active companies. This may develop partnerships.
3. Sent out packages to 5 companies at a time, beginning with those who indicated an interest in upgrading on initial survey.
4. Conducted call-backs to those 5 and determined level of interest before sending out next group of packages. Asked for referrals to other companies during call-backs to create a second list.
5. Sent packages to those on second list.
6. Sent packages in groups of 5 to remaining companies on the target sector list (all manufacturing companies in our area).

Partnerships

Consider making contacts within the following groups in order to establish partnerships, increase marketing possibilities and to encourage an efficient approach to delivery of adult education in the workplace.



Employers

Manufacturers
 Distribution/warehouses
 Identified target sectors (tourism, retail)
 Chamber of Commerce
 Manufacturing Association
 Training Councils/Committees
 Human Resources Groups

Education Providers

Community Based Literacy
 Boards of Education
 Community College
 University
 Private trainers - computer trainers
 - private colleges
 - tutoring services
 Literacy Networks

Community Organizations

Learning Disabilities
 CNIB
 Deaf Services
 Community development organizations
 Social Planning Council
 Skills Development Offices

Unions

Company Union representatives
 Union locals
 Area Labour Councils
 Labour Adjustment Committees

Employees

Class participants
 Employee-manager joint committees
 Graduates

Funders

Human Resources Development Canada
 National Literacy Secretariat
 Provincial funders
 Private foundations

Clubs

Service Clubs
 Business men/women networks

Press

Newsletters -chamber of commerce
 -companies
 -associations
 -service clubs
 -education providers
 Community newspapers
 Business magazines

Other Organizations

ABC Canada
 Ontario Skills Development Office
 Apprenticeship Branch
 Adjustment Advisory Program
 Apprenticeship Placement
 Recognition of Adult Learning
 Women's Access to Apprenticeship

The following is a sample letter sent to other companies in order to form partnerships which will enable classes to be run on a more cost-effective basis.

Company
Address

Dear Sir/Madam

Next month, Company A proposes to offer their employees the opportunity to take a Level 3 math upgrading course delivered by the local community college. This would be located in their main conference room facility, with class time tentatively set between 3:00 and 5:00 p.m. Tuesdays and Thursdays each week for six months.

Company A has graciously invited other interested employees from neighbouring companies to join its own participants in working toward obtaining the requirements for college entrance.

As the Workplace Education co-ordinator, I would be pleased to give you more information about how employees from your company can get involved.

Sincerely,

Workplace Education Co-ordinator

Chapter 7

Advocacy
and
Support

Advocacy And Support

It is only through advocacy and support that a workplace education program can grow and thrive. The Workplace Education programs have a responsibility to nurture the training culture within their communities. It is important for various community groups to promote the philosophy of lifelong learning and the learning culture for the benefit of all.

These goals can be accomplished through:

- marketing WE and providing information to all potential stakeholders
- endorsing the philosophy that learning is valuable for learning's sake
- documenting "soft" skill benefits
- meeting with interest groups to discuss benefits
- advertising community successes at the local, regional, provincial and national levels (articles, reports, presentations, attendance at relevant community/provincial meetings)
- attending conferences to learn more about the theories behind workplace education as well as implementation strategies.

The following charts identify some of the symbiotic relationships which promote and support a healthy workplace program.

Employees

How WE can advocate and support this group	How these groups can advocate on behalf of WE and support WE efforts
<ul style="list-style-type: none"> • Present <u>all</u> employee requests (confidentially) in the report to the employer. • Recommend possible strategies to employers to fulfill employee requests. • Send information to employees' home addresses to give them the option of pursuing training/education on their own time if such training/education is not offered by the company. • Encourage employees to address concerns to their instructors. If this is not practical or possible, workplace staff could be available to handle concerns. • Evaluate programs and solicit employee feedback regarding the effectiveness of programs. 	<ul style="list-style-type: none"> • Ask employers/ unions for academic upgrading, basic skills or other academic training opportunities. • Advocate for appropriate course content. • Tell co-workers, family and friends about opportunities. • Encourage others to become involved. • Evaluate courses attended. • Serve on company, union or advisory education/training committees. • Promote WE within the community.

Employers, Educational Directors, Joint Committees, Unions

<p align="center">How WE can advocate for and support this group</p>	<p align="center">How these groups can advocate on behalf Of WE and support WE efforts</p>
<ul style="list-style-type: none"> • Distribute relevant information to all interested parties to maintain neutrality. • Encourage communication among stakeholders. • Represent the needs of the company to educational providers at provider meetings. • Co-ordinate employees from several companies into one class to keep costs down. • Research information on learning disabilities, task analysis and other literacy related subjects <p>Unions represent a very strong link with employees - the ultimate recipients of the benefits of workplace programs.</p> <p>Workplace staff can support unions in the following ways:</p> <ul style="list-style-type: none"> • Maintain a neutral position to gain the trust of employees, union and employers. • Invite union representatives to all information sessions. • Solicit union feedback during evaluations. • Refuse to provide service to a workplace that does not allow for union/employee participation in educational concerns. 	<ul style="list-style-type: none"> • Actively promote and support a learning environment. • Offer opportunities for a variety of academic/training courses. • Research funding sources/ finance training. • Make educational assistance programmes available to all employees • Support time-share and other employee incentives. • Offer space, equipment and materials. • Recognize employee accomplishments (graduations, special dinners etc.) • Serve on steering committee. • Promote opportunities in newsletters, notices and posters.

Instructors

How WE can advocate and support this group	How these groups can advocate on behalf of WE and support WE efforts
<ul style="list-style-type: none"> •Discuss the realities of instructing in the workplace with instructors new to the field. •Brief hired instructors on the needs of the employees. •Prepare individual learning plans, where applicable, based on the employee interview. •Invite workplace instructors to come together annually to discuss successes, issues and concerns. •Come to the first session of class to make both the employees and the instructor feel more comfortable. •Research professional development opportunities and materials as requested by instructors. 	<ul style="list-style-type: none"> •Provide a welcoming adult environment. •Develop relevant learning materials. •Employ principles of good practice in adult education (as outlined by ABC Canada - see resource list). •Recognize the need for flexibility. •Attend orientation, training, seminars...about WE. •Network with other WE instructors.

Providers

<p style="text-align: center;">How WE can advocate and support this group</p>	<p style="text-align: center;">How these groups can advocate on behalf of WE and support WE efforts</p>
<ul style="list-style-type: none"> • Inform them, through providers meetings, of opportunities of which they might not otherwise be aware. • Provide information about the company's needs. • Act as a liaison between the company and the provider, once a provider has been selected. • Keep in contact with course participants to give details regarding the start date, locations and required materials for classes. 	<ul style="list-style-type: none"> • Recognize the need for flexible, client centered programming. • Hire instructors skilled in adult education. • Provide professional development and workplace orientation for instructors. • Develop delivery methods for non-traditional locations. • Invest in relevant workplace materials and resources. • Advise WE staff about opportunities for workplace activities. • Make referrals.

Other Workplace Projects, Programs and Groups

How WE can advocate and support this group	How these groups can advocate on behalf of WE and support WE efforts
<ul style="list-style-type: none"> • Give them a list of national and provincial organizations which can provide guidance and/or resources. • Provide information on start-up procedures and publicity materials. • Share ideas for partnerships which have proven to be effective. • Encourage newcomers to connect to computer network discussions on workplace education to share strategies, issues, and concerns. • Submit articles outlining your program to local, regional, provincial, and national publications to raise the profile of Workplace Education. 	<ul style="list-style-type: none"> • Make referrals. • Offer space, resources, information. • Provide financial support. • Serve on steering committees.

Chapter 8

Evaluating
the
Model

Evaluation

Some techniques to consider when evaluating a workplace education process:

1. Collaborative evaluation
2. Participation in literacy community planning process (LCPP)
3. Cost-benefit analyses (accomplished more effectively in partnership with organizations experienced in conducting this process - i.e. OSD0)
4. Instructor workshops
5. Input from Advisory committee which represents a cross-section of stakeholders
6. Follow-up surveys initiated by the company to determine internal benefits. Request copies or summary of results.
7. Individual/client employee follow-up
8. Course evaluations conducted by education providers/instructors. Request copies or summary of results.

Note: A formal consistent process for evaluation of courses and instructors may need to be put in place. Not all providers evaluate regularly.

While the above activities are all effective tools to evaluate and effect change in a WE program, collaborative evaluation is a process which yields wide-ranging, comprehensive information.

Collaborative Evaluation

The activities described in the rest of this chapter were developed by ABC Canada. Sue Folinsbee and Mary Ellen Belfiore, ABC Canada, helped us with the planning and directed us through the entire process. For complete details of the structure of collaborative evaluation, please see

Collaborative Evaluation - A Handbook For Workplace Development Planners by Paul Jurmo and Sue Folinsbee.
(Available from ABC Canada for \$20.00)

Why Conduct a Project Evaluation?

Pilot project funding is usually only granted for a limited time (six months - one year). If additional funding is desired, project co-ordinators may decide to do a project evaluation to illustrate the need for or the effectiveness of this service. In order to conduct a project evaluation, information is required from a variety of sources. This information will provide direction and serve as a base for strategic planning.

General questions to be considered are:

- What needs are met by the project?
- What is the value of the project?
- What is working well?
- What changes need to be made?
- Is there any duplication of service?
- Are there gaps yet to be filled?

Why Conduct a collaborative evaluation?

Collaborative evaluations are valuable if the objective is to evaluate the project from a variety of viewpoints. Workplace staff may be pleased with the progress the programs are making but verification (or contradiction) from community partners and participants is needed. The collaborative approach, as outlined by Sue Folinsbee, requires the involvement of a wide range of stakeholders.

Process

The process for conducting a collaborative evaluation is very comprehensive and must, because of its nature, be implemented over a period of time. Depending upon the size of your program/project and the number of stakeholders involved, the length of time necessary for the evaluation will vary.

However, there are steps in the process that should not be missed. They are as follows:

1. Gather stakeholders and form an evaluation team which is representative of your stakeholders.
2. With the evaluation team, determine:
 - background information about the project;
 - the collaborative approach to program evaluation;
 - the audience for evaluation findings;
 - what information should/could be gathered;
 - the reasons for collecting the information
3. Take some time to process the information
4. Again, with the evaluation team
 - develop an evaluation strategy;
 - determine the sources of the information;
 - decide on the collection method;
 - list the questions to be asked;
 - learn the principles of ethnographic interviewing;
 - establish a timeline for implementation
5. Meet to fine-tune the questions to be asked and to draft a letter of introduction to each potential participant to explain the purpose of the evaluation

6. The co-ordinator may then develop evaluation team packages containing contact lists, team member names and phone numbers and target group questionnaires to be distributed to team members
7. During the period allotted for the actual evaluation, team members will
 - conduct personal interviews and/or focus groups;
 - conduct phone surveys;
 - collect completed surveys;
 - deliver information to co-ordinator.

At this point, the co-ordinator will collate the information and prepare a final report subject to the approval of the evaluation team.

Evaluations are useful because they produce direct benefits such as an estimation of the success of your project/program and suggestions for future direction. They can also provide a number of indirect benefits, such as clearly defining the project's mission statement, goals and objectives. An evaluation may help to define the full range of stakeholders in the project, some of whom may not have been obvious. Success indicators from the point of view of stakeholders also emerge during the evaluation process. In addition, because the collaborative approach encourages community participation, the ownership of the program/project expands and workplace education becomes more deeply rooted and supported in the community.

In Peterborough, we took advantage of the opportunity to invite our funder to be a part of the evaluation team. This resulted in a very solid commitment by the funder as she was able to see first hand the careful analysis which the process encouraged; the positive feedback about the project; the manner in which money was spent; and recommendations for future direction which were supported by other community members.

Evaluation....A Learning Process

While the evaluation process is extremely valuable and productive, it can also produce some challenges for workplace staff and evaluation team members alike. Some of these challenges can limit or affect the results of the evaluation and should be avoided if at all possible. Our experience is that most of the following challenges could be alleviated, if not eliminated, if sufficient time is given to the evaluation process.

1. Preparation of survey questions

Once a group of stakeholders from all significant participants (funder, management, union, employee/student, instructor, education providers, WE staff, training council, advisory committee...) is formed, the individuals list the kinds of information they want from the evaluation. Using this list, questions are developed to solicit this information.

We suggest getting expert advice to word the questions for each target group.

There is the possibility that not all questions will be clearly understood (by the interviewer or by the person being interviewed). This could lead to the collection of data which is not anticipated and therefore, difficult to collate.

We suggest a role play or trial run of the questions prior to conducting the evaluation survey.

This activity will identify areas for refinement in the survey and point out the difficulty in recording anecdotal information during a short interview. Some interviewers recorded in-depth information during and after the interviews while others wrote points and phrases which were difficult to interpret during the summary and analysis stage. **Timing during an evaluation is critical.**

2. Timing of evaluation:

To maximize human and financial resources the following are factors to consider:

- Wait until the program/project has been in place for at least one year so that significant data can be collected.
- Conduct evaluation at a time of year when classes are in session. Instructor and employee participants are more accessible when classes are in progress.
- Allow enough time for volunteer interviewers to collect data.
- Allow enough time to summarize, analyze and report on the volume of data collected.

We expected one month would be sufficient, but interviewer work schedules, cancellations, re-bookings and other unforeseen delays made the one-month timeline a difficult constraint, especially in terms of reaching targeted results.

EXPECTED RESULTS		ACTUAL RESULTS	
Participants	50% of 60	30%	18
Employers	80% of 17	88%	15
Unions	100% of 7	43%	3
Providers	100% of 10	60%	6
Instructors	100% of 6	67%	4
Advisory Group	100% of 5	80%	4
Others	As many possible of 10	50%	5
	115	TOTAL	47.8%
			55

3. What do you do with the results?

Collaborative evaluations are designed to solicit information from a wide variety of stakeholders. Resulting information can be cumbersome. The co-ordinator and or project staff must summarize and analyze the collected data before creating a report and executive summary for distribution.

Expert advice provided the following guiding questions for writing the final report.

- who will summarize the raw data?
- who will organize it into useful components?
- how will you record it?
- how will the information be distributed?
- to whom should it be distributed?
- how will recommendations be incorporated into the next funding period?
- is there funding to cover these extra duties?

While the interviewing was all done by volunteers who did not work for the WE project, WE staff devoted a great deal of time over a three month period to process the information and publish a 41 page report. Many extra hours were required to ensure that project work continued at the same time as the report was being prepared.

With generous time limits and co-operation, a final evaluation report should round out the evaluation process. This report should be presented in a clear concise fashion. We found it useful to organize the material from our collaborative evaluation into the following categories. See “Table Of Contents” Page 96.

This report may be quite lengthy and its detail may not be appropriate for everyone who has an interest in Workplace programs. You may want to consider preparing an Executive Summary which will reflect the main parts of the evaluation.

Here is a sample executive summary that you might find useful.

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EVALUATION REPORT
WORKPLACE EDUCATION PROJECT
JUNE 21, 1993- MARCH 31, 1994

**EXECUTIVE
SUMMARY**



CAROL LEEF
WORKPLACE EDUCATION CO-ORDINATOR
705 749-0675

THE TEAM EVALUATION PROCESS HAS BEEN FACILITATED BY
ABC CANADA

THIS PROGRAM HAS BEEN DEVELOPED IN CONSULTATION WITH:

- * KAWARTHA SKILLS DEVELOPMENT COMMITTEE, INC.
- * SIR SANDFORD FLEMING COLLEGE
- * PETERBOROUGH COUNTY BOARD OF EDUCATION
- * TRENT VALLEY LITERACY ASSOCIATION
- * CANADA EMPLOYMENT CENTRE
- * LITERACY ONTARIO CENTRAL SOUTH

THE WORKPLACE EDUCATION PROJECT IS FUNDED BY
THE CANADA EMPLOYMENT CENTRE

The Workplace Education Project has been in operation since June 1993, and in December received an extension to March 31, 1994. The Project, funded by the Canada Employment Centre, was developed in response to a community effort to secure training opportunities for employees in the manufacturing sector needing upgrading and work-related training. Course delivery costs were paid by Peterborough County Board of Education, Sir Sandford Fleming College, employers, Literacy Ontario Central South and Workplace Based Training (CEC). The Project presented an opportunity to increase employees' skills and, as a result, increase business success.

To facilitate these activities, a co-ordinator was hired to make presentations to employers and employees, publicize the Project, conduct needs assessments and recommend the appropriate educational direction. When required, providers were invited to participate in the tendering process for course delivery after informational meetings were held. The neutral role of the co-ordinator ensured that relevant providers were involved in the process.

PUBLICITY

Publicity Packages: To date 198 publicity packages have been distributed.

ASSESSMENTS

Seventy-six individuals have been assessed.

Three new companies are in various stages of the assessment process.

COMPANY INVOLVEMENT

Thirteen companies have been actively involved with employees attending classes:

PROGRAMS

Employees are involved in:

- | | | |
|---|------------------------|--------------------------|
| 1. Literacy tutoring | 5. Grade 11/12 Math | 8. Preparation studies |
| 2. Introductory computers | 6. Grade 11/12 English | (Math/English upgrading) |
| 3. Peer-tutoring | 7. Correspondence | |
| 4. Referrals to existing classes (SSFC, PCBE, private institutions) | | |

Approximately fifty-five local workers are involved in some form of study as a result of this project. (Confidentiality issues related to literacy tutoring prevent an accurate count.)

Eight others are waiting for a credit course to be set up.

The Workplace Education Project worked within the existing educational system by referring employees to community providers or factory high school classes which met the needs of the individuals. Where there was no needs-specific class available, new opportunities were created.

Courses initiated by the project:

1. One course in introductory computers- SSFC (now renewed for a second session for different employees from the same company.)
2. One preparation class (English/Math upgrading)- PCBE/TVLA
3. One high school math class-(outside Peterborough) PCBE
4. One preparation class (English/ Math upgrading)-PCBE/TVLA in partnership with Labour Adjustment Initiative.

PARTNERSHIPS

Partnerships have been established with a number of local companies, public and private education providers, and community/provincial/federal agencies (Kawartha Skills Development Committee Inc., Canada Employment Centre, Employment Service Co-ordination Group, Work Renewal Centre, Ontario Training and Adjustment Board-Apprenticeship, OSDO, ABC Canada).

EVALUATION SUMMARY

Since November 1993, an evaluation team has been meeting to plan and implement a comprehensive evaluation of the Workplace Education Project. The process was directed by facilitators from ABC Canada, a national literacy organization based in Toronto.

During February and March 1994, the Workplace Education Evaluation Team conducted interviews with as many participants as possible from the following groups: employers, employees, advisory committee, providers, instructors, tutors, union officials or designates, and other community agencies (funders, KSDC, OTAB, ...)

Evaluation Findings:

EMPLOYERS

- appreciated the "non-bureaucratic" opportunities for upgrading;
- liked the flexibility of instructors to meet the needs of employees;
- approved of the tendering process to select the delivery organization;
- were surprised by the willingness of companies to share costs for courses;
- wanted more low-cost or funded classes for their employees (not enough financial support for some companies).

EMPLOYEES/UNIONS

- liked attending classes at their workplace and partly on company time;
- enjoyed learning new skills for personal and work-related goals;
- wanted to upgrade, get computer skills and/ or obtain a grade 12 certificate;
- have noticed improved confidence and family relationships;
- have already or plan to continue to take other courses.

PROVIDERS/INSTRUCTORS/TUTORS

- appreciated co-operative opportunity to provide service;
- had been able to create new, part-time employment for four instructors;
- liked the partnerships with companies and willingness of "host" companies to accept participants from other organizations;
- liked small classes so that individual attention can be given;
- wanted to plan the learning based on needs rather than available money.

Analysis:

The findings have verified the projected success of the Workplace Education Project and revealed that the philosophy was its major strength. By focussing on client needs, those involved benefitted from the opportunities to participate in a flexible learning environment. The multi-level partnerships created aided in building better community, employment and family relations.

Many companies expressed interest if financial support were more readily available. Continued research to determine funding sources is necessary. Those interviewed frequently responded that the degree of involvement in the project would be directly related to available funding. Offering the services of Workplace Education outside Peterborough County and outside the manufacturing sector should result in increased avenues for both delivery and on-going project funding.

Due to the short time that the Workplace Education Project was in operation, many outcomes which are expected in the long term are unable to be confirmed. What can be stated with certainty is that the project has met or surpassed all the initial objectives and expectations of the advisory committee with regard to the number of companies actively involved.

Many respondents questioned the low-key marketing approach which was part of the planned implementation strategy. Recommendations reflect the suggestions received.

In summary, the evaluation confirmed that the Workplace Education Project has been very effective in its first phase; however, the team identified some aspects of the process which need to be streamlined.

RECOMMENDATIONS

PROGRAMMING

1. Create flexibility of programming to meet the needs of employers and employees.
2. Develop relevant course content, work-related programs and adult curriculum.
3. Continue to hire instructors who understand the principles of adult education.
4. Continue to use the tendering process where a variety of providers is available.

FUNDING

1. Ensure needs-based programming through funding support.
2. Use partnerships to seek alternative sources of instructional and project funding.

PARTNERSHIPS

1. Continue to develop all partnerships more fully.
2. Develop a rotating service on the Advisory Committee to maximize involvement.
3. Continue to make contact with other business groups in the community.
4. Expand the program to include interested parties outside Peterborough County.

MARKETING

1. Continue with the effective low-key, personal contact style.
2. Develop and implement a second-phase marketing strategy.
3. Involve successful graduates and active companies in the publicity/presentation process.

FUTURE DIRECTIONS

1. Develop guidelines for the tendering and follow-up process.
2. Provide certification at the end of all courses.
3. Give necessary information about course content and expectations at course outset.
4. Provide an orientation workshop and on-going support for instructors as required.
5. Evaluate long-term goals by conducting another evaluation after several years.
6. Providers should continue to monitor WE classes on a regular basis to maintain quality.
7. The co-ordinator should maintain open communications with all partners.

For more information, please contact :
 Kathy Neill, Co-ordinator, Literacy Ontario Central South
 P.O. Box 983, Peterborough, Ontario, K9J 7A5.
 Telephone (705) 749-0777

Facsimile (705) 749-0084

Chapter 9

Resources

Resources

Early in program development program research information about similar efforts. This information will provide guidance for setting up programs, forming partnerships and avoiding problems that other projects may have encountered.

The Workplace Education Project has had the opportunity over the last three years to collect some valuable resources. These resources came in a variety of forms.

The following is a list of books, videos and journals which may provide useful information on the theories, practices and applications of workplace education.

VIDEO

ABC Canada Work force Literacy, "The Key To The Future". September 20, 1993. Playing time: 8:35 minutes.

Keeping Pace With Change. Produced by Workplace Education Manitoba, Steering Committee, in co-operation with Manitoba Labour Education Centre. Playing time: 8 minutes.

"Workplace Education". Narrated by Knowlton Nash (ABC Canada Version) Playing time 18:46 minutes. Available from Workplace Education Centre 1-800-303-1004.

PUBLICATIONS

Anderson, John C, Morley Gunderson, Allen Ponak. (1989). ***Union-Management Relations in Canada - 2nd Edition***. Don Mills, Ontario. Addison-Wesley Publishers.

Benezra Ph.D., Esther, Carol Crealock Ph.D., and Christina Fiedorowics Ph.D. (1993). ***Learning Disabilities and The Workplace***. Ottawa, Ontario.

Bridges, William. (1994). ***Jobshift: How to Prosper in a Workplace Without Jobs***. Don Mills, Ontario: Addison-Wesley Publishers.

Canadian Congress for Learning Opportunities for Women. (Winter 1992/93). ***Women's EDUCATION des femmes***. Toronto, Ontario: Hartley Gibson Ltd.

Crealock, Carol, Ph.D., Chistina Fiedorowicz, Ph.D., et al. (1991). ***Bringing Literacy Within Reach: Identifying and Teaching Adults With Learning Disabilites***. Ottawa, Ontario: Learning Disabilities Association of Canada.

Folinsbee, Sue (Waugh). (1994). ***Workplace Literacy and Basic Skills***. Ottawa, Ontario: National Literacy Secretariat.

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- Literacy, Economy and Society, Results of the first International Adult Literacy Survey* Organization for Economic Co-operation and Development and Statistics Canada. (1995).
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- McIntyre, Martha. (June 1991). *Promoting Workplace Literacy in Kingston: A Process Report*. Kingston, Ontario: Kingston Literacy.
- National Literacy Secretariat. (1993). *Narrowing the Skills Gap, Workplace Literacy Programs in Canada*. Ottawa, Ontario.
- OTAB. (June 1994). *Resources available from the Literacy Section of the Learning and Employment Preparation Branch for Literacy Providers*. Ontario.
- Perrin, Burt. (15 November 1989). *Literacy and Health Project Phase One: Making the World Healthier and Safer for People Who Can't Read, Research Report*. Toronto, Ontario: Ontario Public Health Association.
- Sarmiento, Anthony R. and Ann Kay. (1990). *Worker-centered Learning: A Union Guide to Workplace Literacy*. Washington, D.C.: AFL-CIO Human Resources Development Institute.

Taylor, Maurice C., and Glenda R. Lewe, James A. Draper, editors. *Basic Skills for the Workplace*. (1991). Culture Concepts.

Serge, Peter M. (1990). *The Fifth Discipline: The Art & Practice of The Learning Organization*. New York. Doubleday Publishers.

Waugh, Sue. (December 1990). *Workplace Literacy and Basic Skills*. Ottawa, Ontario: National Literacy Secretariat.

Workplace Basic Skills: A Study of 10 Canadian Programs. (July 1995, 1993). Ottawa, Ontario.

Newsletters

◆ check local literacy networks and community literacy organizations to see if they publish a newsletter.

the bottom line. Western Canada. Workplace Essential Skills Training Network. Julian Evetts. 403-541-1367.

Business Access. Canada Post Corporation and others. P.O. Box 4850 Station E, Ottawa, Ontario K1S 5J1.

Business-based Learning. The Learning Link (Adult Development Branch of Alberta Advanced Education & Career Development). Managing Editor: Carol Humphries. 403-421-7141.

Literacy across the curriculum. The Centre for Literacy, Montreal. Editor: Linda Shoheit. 514-931-8731

Literacy at Work. ABC Canada. Published quarterly. Editor: Tracy Westell. 416-442-2292.

Literacy on the Move. Ontario Literacy Coalition. 416-963-5787.

Literacy W.O.R.K.S. Saskatchewan Literacy Network. Published quarterly. Editor: Liz Ormiston. 306-757-7236.

Report on Business Magazine. The Globe and Mail. Published monthly and distributed with newspaper.

National and Provincial/Territorial Contacts

National

National Adult Literacy Database
Scovil House
 703 Brunswick Street
 Fredericton, New Brunswick
 E3B 1H8
 Tel: (506) 457-6843

ACJnet-Access to Justice Network
 Room 4-40
 93 University Campus N.W.
 Edmonton, Alberta
 T6G 2T4

National Literacy Secretariat
 15 Eddy Street
 Ottawa, Ontario
 K1A 1K5

ABC Canada
 1450 Don Mills Road
 Don Mills, Ontario
 M3B 3X7
 (416) 442-2292
 fax: (416) 442-2292

Frontier College
 35 Jackes Avenue
 Toronto, Ontario
 M4T 1E2
 Tel:(416) 923-3591
 Fax:(416) 323-3522

Laubach Literacy of Canada
 70 Crown Street, Suite 225
 Saint John, New Brunswick
 E2L 2X6
 Tel: (506) 634-1980
 Fax: (506) 634-0944

*Federation canadienne pour
 l'alphabetisation en francais*
 235 chemin Montreal, Piece 205
 Vanier, Ontario
 K1L 6C7
 Tel: (613) 749-5333
 Fax: (613) 749-2252

Movement for Canadian Literacy
 458 MacLaren Street, 2nd Floor
 Ottawa, Ontario
 K1R 5K6
 Tel: (613) 563-2464
 Fax: (613) 563-2504

Provincial

Yukon
Yukon Learn Society
 308A Hanson Street
 Whitehorse, Yukon
 Y1A 1Y4
 (403) 668-6280

Advanced Education Branch
Department of Education
 P.O. Box 2703
 Whitehorse, Yukon
 Y1A 2C6
 Tel: (403) 667-8213
 Fax: (403) 667-8555

Northwest Territories
Literacy And Adult Education
 Government of N.W.T.
 Yellowknife, N.W.T.
 X1A 2L9

Norhtwest Territories cont'd

*Department of Education,
Culture and Employment*

P.O. Box 1320
Yellowknife, N.W.T.
X1A 2L9
Tel: (403) 920-3482
Fax: (403) 873-0237

British Columbia

Adult Literacy Contact Centre
622-510 West Hastings Street
Vancouver, British Columbia
V6B 1L8
Tel: (604) 684-0624

Adult Literacy Program
Ministry of Skills, Training and Labour
2nd Floor , 838 Fort Street
Victoria, British Columbia
V8V 1X4
Tel: (604) 387-6174

Alberta

Adult Development Branch
*Alberta Advanced Education and Career
Development*
10th Floor, Commerce Place
10155-102 Street
Edmonton, Alberta
T5J 4L5
Tel: (403) 427-5624

Saskatchewan

Saskatchewan Education Resource Centre
2220 College Ave.
Regina, Saskatchewan
S4P 3V7
Tel: (306) 787-5977

*Adult Basic Education and Sponsored
Programs Unit*
*Saskatchewan Education, Training and
Employment*

6th Floor - North Tower
2045 Broad Street
Regina, Saskatchewan
S4P 3V7
Tel: (306) 787-2513
Fax: (787-7182

Manitoba

*Literacy and Continuing Education
Education and Training*
417-185 Carlton Street
Winnipeg, Manitoba
R3C 3J1
Tel: (204) 945-8247

*Employment Development
Programs and Literacy*
Department of Education and Training
410-185 Carlton Street
Winnipeg, Manitoba
R3C 3J1
Tel: (204) 945-8247
Fax: (204) 945-1792

Ontario

Alpha Ontario
21 Park Road
Toronto, Ontario
M4W 2N8
1-800-363-0007

*Centre Franco-Ontarien de Resources en
Alphabetisation*
533, rue Notre Dame
Sudbury, Ontario
P3C 5L1

Ontario continued***Ontario Training and Adjustment Board***

625 Church Street, 3rd Floor

Toronto, Ontario

M4Y 2E8

Tel: (416)326-5456

Fax: (416) 326-5505

Quebec***Le Centre De Documentation en Education des Adultes et la Condition Feminine***

#340 - 1265 rue Berri

Montreal, Quebec

H2L 4X4

Tel: (514) 844-3674

The Centre for Literacy of Quebec

3040 Sherbrooke Street West

Montreal, Quebec

H3Z 1A4

Tel: (514)931-8731 ext. 1411

Service De L'Alphabetisation***Direction generale des programmes******Ministere de l'Education***

1035 rue de la Chevrotiere

Quebec, Quebec

G1R 5A5

Tel: (418) 644-0220

Fax: (418) 643-0056

New Brunswick***Department of Advanced Education and Labour***

P.O. Box 6000

Fredericton, N.B.

E3B 5H1

Tel: (506) 453-3298

Fax: (506) 453-3300

Prince Edward Island***Office of Higher Education, Training and Adult Education***

P.O. Box 2000

Charlottetown, PEI

C1A 7N8

Tel: (902) 368-4470

Nova Scotia***Literacy Section******Nova Scotia Department of Education***

Trade Mart Building

2021 Brunswick Street

P.O. Box 578

Halifax, Nova Scotia

B3J 2S9

Tel: (902) 424-5162

Fax: (902) 424-0666

Newfoundland***Literacy Policy Office******Department of Education and Training***

Box 8700

St. John's Newfoundland

A1B 4J6

Tel: (709) 729-5906

Fax: (709) 729-3669

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Printed Name: CAROLYN LEEF	Organization: WORKPLACE EDUCATION PROJECT
Address: P.O. BOX 182 PETERBOROUGH, ONTARIO K9J 6Y8 CANADA	Telephone Number: (705) 749-0675
	Date: AUGUST 29, 1996

Carolyn Leef, Aug. 29/96.