

# Good Practice in Use

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## GUIDELINES FOR GOOD PRACTICE IN WORKPLACE EDUCATION

*by*  
*Mary Ellen Belfiore*



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September 2002



## FORWARD AND ACKNOWLEDGEMENTS

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This research was conducted to provide background and an impetus for discussion about good practice in workplace education as Literacy and Basic Skills providers move forward to deliver LBS-like programs in the workplace in Ontario. As such, we researched good practice documents from the international workplace literacy community and talked to practitioners from the field.

Thanks to the educators in Ontario, the United States, Great Britain, Australia and New Zealand who gave their input on the many issues related to good practice.

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Any views implied in this research paper were intended to be a reflection of the various opinions and principles held in surveyed documents and by workplace literacy practitioners in and beyond Ontario, and are not intended to reflect the views of the Ministry or Government of Ontario.

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## Guidelines for Good Practice in Workplace Education

### Introduction

With a new workplace literacy strategy introduced in Ontario in 2001, it is an appropriate time to revisit good practice in workplace education.<sup>1</sup> Good practice, also referred to as best practice or successful practice, is composed of key elements that account for quality, effectiveness and satisfaction for all the partners in workplace education. Changes in national and provincial economies, political maps and educational policies also affect workplace practice. What impacts have the rapid and significant changes in all these areas over the last decade had on good practice in workplace education? In most cases, statements of principles or guidelines are offered by educational organizations or responsible government agencies. During the 1990s, educators in many jurisdictions in Canada, the United States, Britain and Australia reflected on practices that were successful in promoting, planning and delivering workplace education. In that decade certain practices became standard in quality programs: the promotion of working partnerships, joint committees or planning/evaluation teams, organizational or workplace needs assessments, contextualized individual assessments and curriculum, and evaluation procedures involving all interest groups.

In Canada, the national picture emerged in a think tank on good practice in workplace/workforce education sponsored by ABC CANADA in 1995. This event

brought together people with a keen interest in the topic from business, labour, education and government. The think tank organizers were not seeking consensus but rather “trying to understand those points of convergence and disagreements in good practice that could be used as a springboard for debate and discussion within the field” (McLeod, 1995, p. 1). The document shows the range and hues of agreement on categories of good practice. Representatives, speaking from within their own contexts, share some strong opinions and at the same time voice their own nuanced differences as evidence of where they are positioned in workplace education. Taylor (1998) then took this good practice framework and examined it against evidence from the field. Ultimately, each of us has to revisit good practice with our partners each time we become involved in a workplace education project.

## Purpose of the Report

This report is a working document to help educators<sup>2</sup> test out ‘good practice in use.’ This report is part of the cycle of action — reflection — action or praxis. In the 70s and 80s we practiced workplace education as a new and uncharted enterprise in Ontario. In between projects we reflected on what went well, what went awry, and how to improve our work. Then, like many other educators in industrialized countries in the 90s, we put down on paper what we determined to be guidelines for practice. Considering the complexity of the workplace, the experienced educator as well as the novice appreciated principles or guidelines. Guidelines are embedded in the realities of the era; while many aspects of good practice remain true and relevant, changes in economies, politics and education force us to reconsider what we do and how we do it. Practice changes to reflect these larger forces. We are at a point of reconsideration, of reflection, once again. We consider good practice that is in use currently not only in Ontario but in other jurisdictions that have made major contributions to the

field of workplace education. Out of this good practice in use, we redefine good practice on paper once again.

Educators go through this process individually or collectively as a group. Good practice is created in use, and in reflection on use. One way into exploring good practice in use is to look at how standards actually operate in workplaces. For instance, quality systems in manufacturing such as ISO (International Organization for Standardization) are based on theories of how quality can be assured. O'Connor describes how workers then test out theories by bringing all their knowledge and experience of the workplace to the task; thus, subjecting theories to practice on the floor:

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*What is often evident in many workplaces is what some writers have referred to as the development and testing of 'theories in use' rather than espoused theories of work. Workers are forced to regularly question, and often abandon the official theory (or standard practice) as their experience demonstrates that these do not fit a particular situation. They are constantly...drawing on their own culture-based knowledge and experience of the work-life and the world, in relation to what their own reality tells them will work. This process is refined and honed in the course of daily work experience. (1995, no pagination).*

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As in the workplace, educators are refining and honing what constitutes good practice in their daily experiences of learning, teaching and partnering. These guidelines for good practice are meant to be tested out in the context of your community, its workplaces and your network. The guidelines represent the accumulated experiences and memory of workplace educators in Canada, the United States, Britain and Australia over the last 20 years. Nevertheless, they are only statements until you put them into use; over time, define your own good practices, document them, and continue to review and refine.

## Methodology

For this report, I surveyed a variety of formal and informal statements of good practice published since 1990 in Canada, the United States, Britain and Australia. In some documents, good practice was explicitly stated and in others it was implicit in the description of how the programs operated. I also interviewed educators currently working in the field in Ontario, New York, and Massachusetts; another consultant, an associate in professional development for workplace educators with Lancaster University (England), was also familiar with educators, publications and activities in Australia. For educators in Ontario relatively new to the field, I was interested in how they were using good practice guidelines. For those with experience, I wanted to know what was new in good practice and how the current economic, political and educational contexts were influencing good practice today.

In Ontario, for instance, funding for adult education has been drastically reduced over the last decade. Workplace education, a once thriving avenue for adults to reconnect with education, has been barely visible on the provincial map since the mid to late 90s. Now, workplace education reemerges as part of Literacy and Basic Skills (LBS), a long-standing program with stable links in communities and educational institutions. This new framework for workplace education will affect good practice as the field redefines itself.

In other jurisdictions (e.g., Massachusetts and Australia), changes in the economic and political climates have also repositioned workplace education. In Australia, workplace basic skills is best promoted through industry 'training packages' where it is part of a large-scale training plan for sectors or industries. The authors of *Built-in not Bolted-on* say "the most strategic and effective role in industries of a literacy and language practitioner is as a member of a training team" (Bradley et. al., 2000, p. 11). In that capacity, they can

contribute more broadly by supporting training with adult education principles, working with technical trainers, developing training materials, and ensuring that industry assessments follow good practice guidelines. The face-to-face training that defines workplace education in many other jurisdictions is seen as just one role for educators. Even that role is reframed by their socio-cultural approach to literacies<sup>3</sup> and language. Literacies are built-in to work and the culture of the workplace, built-in to the people relations and how work actually gets done, not bolted-on as a skill or activity separated from people, work and power. By extension, workplace literacies and language get built-in to the whole system of training, not bolted-on as an afterthought, or the pre-cursor to the real focus — job training.

## Purpose of Good Practice Guidelines

Good practice guidelines offer direction and support in planning, delivering and evaluating all aspects of workplace education activities. Nancy Steel and her colleagues (Johnston, Folinsbee and Belfiore, 1997) see the clear connection to the work of educators:

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*Principles provide the foundation that can help practitioners make decisions about their practice that are consistent and thoughtful throughout the widely different contexts in workplace education. They help provide boundaries and limits for determining what one will and will not do. (p. 95)*

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Good practices can raise the overall quality, consistency and expected outcomes of our work as we continue to reflect on what we have done and refine our guidelines based on good practice in use. The cycle of action — reflection — action leads to high consciousness and thoughtfulness about all aspects of our work.

Despite differences in countries, regions and industries, a fairly consistent set of good practice guidelines has emerged after two decades of work and documentation. The experienced educators I spoke with concurred with these good practice guidelines although they were now interpreting them in changed economic, political and educational circumstances. For some, workplace education<sup>4</sup> is now part of a recognized larger system of partnerships in workforce/workplace education as in Australia's 'training packages' (Bradley et. al., 2000). For others, it has become a component of government efforts to redirect adult education and work through local or regional partnership enterprises. In Ontario, workplace education is now part of Literacy and Basic Skills (LBS) programming (Ministry of Training, Colleges and Universities) and educators will have to integrate two sets of guidelines in their work. The commonalties will be evident as educators examine their good practice in use and continue to refine good workplace practice in an LBS framework.

## Assumptions

Certain over-arching elements are consistently evident in all the good practice statements. Here, we present them as assumptions or accepted beliefs which frame all educational activities in workplaces.

### **1 Adult education principles should direct teaching and learning activities in all aspects of workplace education.**

These principles include:

- valuing experience and building on the knowledge/experience of participants; ensuring respect for all participants as adult learners
- accepting participants as decision makers and ensuring their active involvement in program design

- recognizing and accommodating different learning styles
- developing and using materials that are appropriate to adults and the workplace
- recognizing that people have personal responsibilities and time commitments

(Adapted from McLeod, 1995, p. 16).

Generally, union sponsored programs start with a worker-centred approach to workplace education. The Canadian Labour Congress (CLC) in *Learning for Our Lives: A Union Guide to Worker-Centred Literacy* defines this approach as “education for the learner as a whole person — an individual, a worker, a family member, a trade unionist, and a citizen (p. 23). In joint programs, the union’s presence may ensure that personal learning goals are incorporated in addition to work goals. While overlapping with many of the adult education principles above, a worker-centred approach also aims for workers to gain “more control over their lives and their jobs” (CLC, 2000, p. 23).

Steel and others (1997) start out with three basic principles which inform all practice and “run like threads through all that we do: 1) focus on assets rather than deficits; 2) use a holistic approach, focusing on the whole workplace and the whole person; 3) ...inclusion and collaboration” (p. 98). These three principles capture the essence of all approaches to adult education.

## **2 Partnerships between labour/workers, employers, educators and funders structure workplace education initiatives and are essential.**

These partners represent the essential players that must be at the table to plan, design and deliver workplace education. Partnerships have become the mechanism for seeking out and obtaining funding from public and private sources. In other jurisdictions (particularly in

certain US states and in Australia), partnerships have evolved to broad-based cooperative units which include representatives from regional training authorities, industry training councils, local community agencies, educational institutions, employment service agencies and other key players in work, education and training. In these partnerships, workplace education is just one element in an integrated effort to provide support for workers to gain, maintain and enhance their jobs as well as increase their incomes.

Employers, labour/workers and educators are the on-site partners for workplace education. Some people see the educator as a resource and not a primary partner. Each has an important role to play in actively supporting educational activities in each phase of the initiative from initial planning through evaluation.

### **3 Workplace educators act in a variety of capacities drawing on their knowledge, skills and experience in planning, programming, teaching, and facilitating learning.**

Sue Folinsbee in *Looking Back, Looking Forward*, covers the wide range of work open to workplace educators: “instructor, researcher, needs assessor, program developer, instructor trainer, mentor, educational advocate” as well as “program planners and implementers, learning facilitators and evaluators.” (p. 5, 8)

### **4 The core quality standards and principles of LBS programs provide the larger educational framework for workplace education in Ontario.**

The LBS program principles are:

- results-based
- community-based
- cost-effective

- accessible
- accountable
- flexible
- learner-centred
- based on adult education principles
- linked to the broader education and training system

Similar frameworks and principles can be found in other jurisdictions in North America, Britain and Australia. For instance, in *Breaking Down Barriers: Certificate in Workplace Language, Literacy and Numeracy Training*, Holland and others provide explanations of recent government policies and strategies in adult language and literacy which take a similar approach.

Through experience and professional development, the literacy networks in Ontario and the LBS delivery agencies can work at integrating the assumptions and good practice of workplace delivery into the LBS standards and principles.

## Statements of Good Practice

The following essential features are included in all the statements of good practice, both formal and informal, that were reviewed.

- 1 Participation is voluntary** in all aspects of workplace education.
- 2 Confidentiality** is assured in all types of assessments (organizational and individual), in reports of progress and in evaluations.
- 3 An organizational or workplace needs assessment** (ONA<sup>5</sup> or WNA) is a necessary step to ensure that all levels of the workforce have a say in determining if and what education/training is appropriate; if it fits the culture

and goals of the individuals and the organization; and, if it will be supported by the workforce.

- 4 The **curriculum and learning materials are customized** and contextualized to meet the needs and interests of workers and employers.
- 5 **Evaluations**, both ongoing and final, are based on the goals established by the partners and measure the progress made toward those goals.
- 6 A **commitment to lifelong learning** and links to further education and training are part of the workplace education strategy for an organization/union.
- 7 **Workplace educators, as partners in workplace learning**, facilitate cooperative decision-making among partners as well as provide relevant opportunities and materials for learning.

Further key characteristics of successful workplace education initiatives are included by a majority of the documents or educators:

- 8 A **team/committee/group representing the on-site partners** (workers/union, management, educator/facilitator) plans, designs, supports and monitors the learning initiative.
- 9 **Equity** is respected and promoted in partnerships, in issues of access, in distribution of services and in marketing.

Some documents and educators mention these additional features of successful workplace education programming:

- 10 A **variety of delivery models** are available to match up with the learning needs/interests/style of individuals and the organization.

- 11 **Location and timing** of education programs enhance the learning opportunities by offering the most suitable time and location for the participants.
- 12 Employer and participants in programs demonstrate their commitment through **shared time**, release time, stipends or bonuses.
- 13 **Marketing materials and activities clearly communicate** the program's assumptions, approaches to adult education, achievable goals and benefits for participants, unions and employers.

## Considering Good Practice in Use

In this section we begin by explaining each statement of good practice. Then we offer some questions or dilemmas to demonstrate that good practice is our best interpretation of valued practices in particular situations. That is, good practice is situated in an organization and the union, in the group of workers, staff and management, in the culture of the organization including its communication practices, its valuing (or not) of literacies, its social relations and its hierarchies of power.

### *Voluntary*

People participate in all aspects of the program on a voluntary basis. There are many activities surrounding and supporting workplace learning — people can be part of planning teams or committees, contribute their ideas in an organizational needs assessment, offer comments and suggestions in ongoing and final evaluations, and take part in educational programs. People participate in these activities voluntarily, choosing to be a committee member, a respondent in a needs assessment or a learner in a program.

Educators agree that volunteering encourages participation and access. “Mandatory attendance,” says one educator, “guarantees failure by putting pressure on people who didn’t succeed before.”

**Consider...**

*How much 'massaging' of the workforce is necessary to gain participation? When does a worker interpret the strong encouragement from his supervisor to take part in a program as an order to do so or face the consequences? How do we answer a request to test everyone in the workforce to determine his or her skill levels in reading, writing and math?*

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As educators, we can present the case for voluntary participation as the best means to an end — forcing people to participate usually results in resistance so learning becomes another obstacle in the day rather than an opportunity to grow. We appreciate the help of our supporters in encouraging participation from the workforce. But when that encouragement turns into a requirement to participate, educators have to deal with the negative effects of resistance and misunderstandings about the purpose of educational activities.

Insisting that the whole workforce be tested for their literacy skills is an example of mandatory participation. In one such instance, educators found that workers defied the testing guidelines by talking to each other and helping out their co-workers, just as they would do in any normal work situation.

**Confidentiality**

In most good practice statements, confidentiality is first and foremost attributed to the reporting of test results and individual assessments of skills and/or progress. **This record keeping and reporting is the most contentious area of confidentiality between educators and employers.** In addition, educators generally agree that confidentiality is also extended to all an individual's input in all phases of the program. Participants in workplace needs assessments and program evaluations are assured that all comments remain anonymous and no one will be identified in the reports. Work done during an educational program remains confidential unless participants decide to make it public in any way they choose. For instance, Taylor (1998) says that

employees might decide if they want GED test results passed on or not.

Several documents provide in-depth examinations of individual assessment procedures with confidentiality always seen as essential. In addition to confidentiality, both O'Connor (1995), an Australian educator, and participants in an ABC CANADA think tank on good practice in worker assessment (1999) recommend a collaborative process to develop the purpose, use and outcomes of assessments. This process helps to ensure that the form of assessment is appropriate for the context. The think tank develops their practice around respect for equity, bias-free and varied tools, privacy, voluntary participation and regular review of assessment tools. O'Connor aims for tools that assess on the job "because communication practices are integral to the job" and need to be authentic. He advocates an approach that focuses on "developing existing competencies rather than looking for and documenting deficiencies" (1995, no pagination). He also suggests an appeal mechanism for people who want to challenge any aspect of the assessment.

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**Consider...**

*How do we deal with an HR staff person who initially agreed to confidentiality of assessments and progress reports but now is backtracking by repeatedly asking for individual reports? How firm is confidentiality? Who would know if quotes from participants included in an ONA report might be traced back to particular people? How do we deal with pressure to use standardized assessment tools that might result in people being negatively labeled with low literacy skills, especially if they are doing their jobs well.*

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Overall, the literature and individual educators take confidentiality very seriously. As O'Connor says, this practice "reflects the complex realities of the workplace and participants" (1995, no pagination). It is important to ask

questions to understand what the issues are for the HR staff person. Why are individual progress reports so important now when group reporting was initially agreed upon? What role does assessment play in the company's future plans for the workforce? How can some of their needs be met without breaking the confidentiality that program participants agreed to? In these circumstances, the direction and support of a workplace committee/team can be helpful in establishing confidentiality from the start, clarifying past practices in the organization and providing firm support for good practice now. Likewise, the committee could ensure that quotes used in an ONA report respect the confidentiality of all the participants.

For many educators, lack of confidentiality is cause for refusing to provide services to an organization. Some educators have first hand experience of test results being used to lay off or replace workers — a painful lesson. The Canadian Labour Congress (CLC) in *Learning for Our Lives* says, “just say no” to a “program where there is testing and reporting to the employer on individual results or progress” (p. 19).

The use of standardized assessment tools deserves serious questioning. What's the situation? Why use this avenue? If people are performing well, what will these test results be used for? Will the results speak to the real use of language and literacies in that workplace? As mentioned earlier, many factors contribute to people's performance; standardized tests isolate skills and usually decontextualize them. Thus, the tests can have little resemblance to the language and literacy tasks that are meaningful to people. Furthermore, they don't account for the rich social relations, which also help shape literacy practices.

### ***Organizational Needs Assessment (ONA)***

An organizational needs assessment (ONA) is recognized as being a strategic planning tool, “a necessary first step” (McLeod, 1995, p. 13) in the literature describing good practice. Folinsbee and Jurmo define it as, “a systematic way

of identifying all workplace needs, not just those that require an educational response.” They state three purposes:

- 1 To identify an organization’s overall educational needs, with a focus on basic skills.
- 2 To identify other workplace needs resulting from ongoing organizational change.
- 3 To specify a range of activities that will help employees and organizations fulfill identified needs.

(Folinsbee & Jurmo, 1994, p. 13)

The ONA situates the educational needs and interests of the workforce in the culture of the organization. Basic skills/ language and literacies are examined in the context of communication practices, work organization and workplace change. As a result, the ONA helps to ensure that education and training are the appropriate response (Massachusetts Workplace Literacy Committee, 2001) and “does not necessarily assume that training will always be the only solution” (Holland et. al., 2001, p. 41). More targeted assessments, such as a literacy task analysis, can be one component of the broader ONA.

Taylor sees the ONA as “paramount to success” (1995, p. 91) and perhaps the only chance employees get to express their educational interests. He found that without it, programs encountered difficulties later on with mismatches of learners and content (1998). Cichon and Sperazi find other important benefits from an ONA:

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*It helps the [workplace committee] make realistic judgments about what a literacy program can and cannot accomplish, helps to facilitate the integration of workplace and educational goals, and introduces educational staff to the workplace, in particular to workers, supervisors and managers.*

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(1997, p. 8)

**Consider...**

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*How broad does an ONA have to be? An organization might only want to consider a basic skills program and not to open the door for workers and staff to express the full range of their interests in education and training. Communication systems and practices...what does that have to do with language and literacies? Or, if a company and union just want to help a certain group of workers pass a certification test, what kind of needs assessment would be suitable?*

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Language and literacies function within a company's overall communication practices and are best understood as one part of a whole. One simple question in an ONA such as "How well does communication work here?" usually results in a wealth of information from multiple perspectives. If companies are serious about offering opportunities to improve language and literacies, then it's important for them to hear that they don't exist separately or outside of a culture of communication. Working on one small area of need in isolation from larger practices may not achieve the results they hope for. The ONA findings shine a light on certain aspects of culture that help educators and the workplace committee understand what role education can play. Other activities, such as holding more employee meetings about upcoming changes, could answer needs better than an education program. Not all the ONA recommendations may be accepted or acted on immediately but the documentation serves as a baseline for future activities.

Ultimately, the scope of the ONA is determined by the workplace committee or the organization. They may decide on a strong focus on basic skills without direct questions on other topics such as communication practices or job training. Even in these circumstances, participants in the needs assessment often bring up those larger issues, reflecting their understanding of the culture they work in.

Sometimes educators may see potential in an organization but realize it will not agree to or pay for an ONA at that time. They might propose a small-scale snapshot of the company or a program needs assessment to gather information from different levels of the organization about an education program. Preparing workers for a certification exam would be an example. The scope of inquiry and the number of people interviewed is reduced but the educator can gather some basic information about the company and the workforce, goals and expectations. Where does this certification fit into the company's goals and long-term plans? What does the job entail? What materials and test preparation resources are available? An ONA or some scaled-down, focused version of a needs assessment is one way we as educators can protect ourselves, understand the company and the workforce, understand what they want and need, and know what we can offer.

### ***Customized Curriculum***

Workplace education programs are usually set up to meet the particular needs of the workforce, the employer and the union. Most good practice statements say the “needs of the workers and the workplace are not mutually exclusive” (McLeod, 1995, p. 17). Materials and “lessons include but are not limited to workplace” topics (Massachusetts Department of Education, 2001, p. 9). Worker-centred learning, as described by the CLC, “enriches the lives of the learners and expands their potential not only as workers but also as individuals, unions members, family members and citizens” (CLC, 2000, p. 24).

Together, the ONA and the individual assessments lay out the interests, needs and goals of participants and the organization. Educators, working with the participants and the workplace committee, develop a curriculum with clearly stated educational goals, realistic learning objectives and program outcomes that become the basis for evaluation. Where workplace education is one component of an accredited training system, good practice also links the

objectives and outcomes to the requirements of the larger system (Holland et. al, 2001, p. 72). Many good practice statements refer to the importance of transferability of language and literacy skills achieved through teaching both content and a learning process. This notion of transferability enables educators to say that there can be a wide application of skills across different contexts; for instance, personal learning helps workplace learning and vice versa. Taking a different perspective, Taylor (1997) sees transfer of learning in the workplace as the *application* of language and literacy learning on the job.

Print materials from the workplace and from participants' own personal use often form the basis of learning materials. Educators then create opportunities for learning in a classroom, on the job, in a computer room, through distance mode or by other appropriate means.

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**Consider...**

*If we teach workers how to fill in their quality checklists, have we fulfilled our responsibility toward workers' achieving a learning outcome to use their checklists on the job? How can a GED course requested by managers satisfy the communication and literacy concerns that they present to you? Can learning how to fill in a work form satisfy the needs of workers to handle their own tax forms or insurance forms?*

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Learning outcomes demand real life demonstrations. In the workplace, using language and literacy skills on the job can be the best demonstration that teaching and learning has been effective. We may find that expectations cannot be met if we fail to consider other factors that affect literacy practices — risk, fear, intimidation, protection of self and co-workers just to name a few. For example, a worker may decide not to report an error in order to protect a co-worker whose friendship she values. This decision not to write is driven by

social relations and overrides any lessons learned in a literacy class.

If curriculum and materials are to be tailored for each program, how can pre-scripted courses like GED preparation satisfy particular needs and interests related to work? GED preparation is a common request from both managers and workers whether or not it is actually the appropriate course. Workers may want to get their diploma to satisfy their own personal goals. Managers often see the GED as the answer to what they perceive to be educational problems and workers then find themselves caught in the grade 12 requirement for hiring or promotion. Good practice suggests that we make clear to the employer and the union what type of educational activities can satisfy their particular needs, interests and desired outcomes. New developments in a workplace GED and in materials that combine GED and workplace<sup>6</sup> have tried to bridge the two different needs. In the end, educators will have to judge how best to satisfy competing needs and recommend options that offer a range of possible results.

The notion of transferability of skills might lead us to think that we can satisfy a wide variety of needs across different contexts: the GED will address specific workplace issues; or, incorporating production forms in learning materials will help people tackle other forms at home. For educators who see literacy as a situated practice,<sup>7</sup> transferability is questionable. The purpose and use of forms plus the necessary background knowledge about how and why they are actually used help shape literacy practices. Strategies for dealing with standard printed forms and for understanding their contexts might offer more avenues for catering to both work and personal interests.

### ***Evaluation***

Ongoing and final evaluations are universally recognized as essential to good practice. There is also agreement that evaluation measures the progress toward the goals established at the outset or redefined along the way. There is

“demonstrable evidence of substantial progress toward anticipated and unanticipated goals for all stakeholders” (Massachusetts Department of Education, 2001, p. 9).

The literature and educators agree on the involvement of all partners in establishing success factors and how to measure them at the beginning of the initiative (McLeod, 1995).

O’Connor defines the evaluation as a collective effort, “responsive to the multiple objectives, motives and needs of everyone involved” (1992, p. 29).

Some statements mention the need for both quantitative and qualitative information (for instance, McLeod, 1995; Massachusetts Workplace Literacy Consortium, 1999; Holland et. al., 2001) while others, such as the CLC (2000), concentrate more on the satisfaction of participants, changes they observe in themselves and in what they can do. The think tank participants identified four areas for gathering information:

- ▶ satisfaction of the participants in the program
- ▶ knowledge acquisition
- ▶ knowledge transfer
- ▶ impact on business and other stakeholders

(McLeod, 1995, p. 19)

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### **Consider...**

*What counts as demonstrations of learning in a workplace setting and who determines how successful those demonstrations are? How can we ensure that the voices of all the partners are part of evaluation procedures?*

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Some of the learning objectives for workplace programs are aimed at language and literacy practices on the job. In those cases, educators could follow the learning process onto the job and see how well participants are able to incorporate what they have learned into their daily work routine. This

follow-up requires educators to be out in the work area more often, observing how work is accomplished, what literacies are required and how they are practiced. As mentioned above in the curriculum section, literacies are interwoven with social relations at work, which may account for different demonstrations of learning than originally conceived. With that possible difference in mind, educators gather information from various partners on what counts for success — workers/learners, supervisors, union representatives, managers or staff. Evaluators look for similar patterns across a range of perspectives and take account of significant differences.

Educators find the direction and support of a workplace committee/team invaluable in ensuring that all interest groups are involved in the evaluations.

### ***Commitment to Lifelong Learning***

All good practice statements are grounded in a commitment to lifelong learning although its presentation varies depending on how workplace education is integrated into the larger economic and governing structures. Taylor (1998) reports that workplace education is seen as “part of a larger strategy to enhance employment satisfaction and encourage learning for its own sake” (p. 17). In an earlier research study (1993), he found that fostering dignity, respect, self-development and self-esteem were important for participants to make their own commitments to lifelong learning. Recognition of achievement and progress is the most basic demonstration of respect for lifelong learning.

Other statements, especially those from organizations in the USA, Britain and Australia, link ongoing learning to career ladders, accredited programs and/or the “full sequence of educational services in the community” (Massachusetts Department of Education, 2001, p. 10). The Consortium for Worker Education in New York City says their highest priority is to “provide mobility within the workforce and facilitate entry into higher education programs in an era of

downsizing, restructuring and computerization” (website — Exemplary practice for workplace literacy). The Massachusetts Workplace Education Committee states that effective programs are not only “linked to existing company-based training and education” but also partners “demonstrate a commitment to lifelong learning by rewarding employee education and training” (2001).

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**Consider...**

*Companies are often looking for a one shot program to improve the performance of certain employees or to boost morale. Where does lifelong learning fit in?*

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Most organizations understand the importance of continuous improvement which is linked to ongoing learning, especially informal learning. Some companies are mandated to provide formal training for employees as part of their certification for international quality or safety systems. Educators can use these continuous learning opportunities as an entry into thinking about a training or education strategy, which includes language and literacy. Integrating basic skills into job specific training is one guarantee of securing a place in a continuum of training. Often, we have to begin where the organization is at, demonstrate the value of workplace education and then engage the partners in more learning for life and work.

**Quality Educators**

High quality educators (also referred to as practitioners) are the bedrock of workplace education programs and are expected to engage in good practice with all their partners. In broad terms, workplace educators can be described as “facilitating the learning process” (Folinsbee, 1998, p. 5). In Ontario, the roles of educators have often been divided between instructors who deliver programs and develop curriculum, and coordinators/consultants who market, negotiate, conduct ONAs, and evaluations.

In guidelines and in descriptions of effective programs, educators are generally described as understanding of adult education principles, believers in lifelong learning, respectful of diversity and the views of all interest groups, responsible to multiple partners, and knowledgeable about business, unions and industry. The CLC (2000) describes quality educators as “sensitive to diversity, open-minded, willing to learn, resourceful, creative, democratic, approachable... comfortable in open-ended situations” (p. 58).

A variety of good practice statements point to more specific characteristics: customize curriculum from individual and organizational needs, integrate basic skills into job training, work collaboratively with a workplace committee/team, use technology as appropriate, and work with other trainers to offer a wider range of learning opportunities.

In an Australian model (Bradley et. al., 2000), the workplace educator’s most significant role is being a member of an industrial training team. There, the educator ensures that language and literacy are integrated into large-scale training strategies for the industry. Other educational roles emphasize cooperative teamwork with a job trainer, developing materials, and ensuring good practice in assessment.

Some guidelines<sup>8</sup> place importance on providing professional development opportunities and career avenues for workplace educators. Participants in the think tank expressed general support in stating the need for “strategic approaches to development” (McLeod, 1995, p. 18). Despina and others (1997) get more specific by describing professional development as necessary to keep abreast of developing needs in business, labour and with learners. They recommend training on international quality systems for instance. They also suggest a career ladder for educators with introductory and advanced training.

**Consider...**


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*How can adult educators new to the workplace be expected to demonstrate all the aspects of good practice?*

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As with the other elements in good practice, each person's experience, knowledge, skills and abilities situate them in relation to good practice. As educators, we have a sense of our entry point and realize that experience and professional development can enhance the effectiveness of our work. In certain jurisdictions, educators new to the field can work with mentors in conjunction with formal professional development programs. Or, the staff development combines a type of practicum in a workplace supported by classroom study and mentorship.<sup>9</sup> A conscious and thoughtful approach to the complexities of the workplace is the first step on the path of good practice.

**Workplace Committee or Planning Team**

Most good practice guidelines and experienced educators advocate for a strong role for the workplace committee. Members of the committee are drawn from all the on-site partner groups: workers, staff, supervisors, managers, union representatives and educator/facilitator. Committees are referred to by a variety of names: steering committee or steering group, planning team or planning group, coordinating committee or training committee. They are always multi-level and as representative of the make up of the workforce as possible. The aim is to have people representing different perspectives working together with equal voices.

Joint committee defines the group as consisting of both union and management. The CLC (2000) sets out terms of reference for joint committees establishing equality in the partnership, equal number of representatives from the union and management at the table, and a participatory decision-making process among others.

The committee's role, as described in many good practice statements, is to design, support and monitor educational

and training activities. Educators often play the role of facilitator, assisting the committee in planning and implementing the ONA, the program design and delivery, and ongoing and final evaluations. The literature shows a range of overall responsibility for committees from being the primary decision-maker and body responsible for implementation to a more distanced role, overseeing the work of others and having input into all aspects of programming.

Committees are part of good practice because they attempt to ensure participation from all levels of the organization and union. This participation is key to broad outreach and successful programs. Steel and others (1997) say that committees provide a forum for discussion of issues, can help define more assets and needs in the organization, promote a vision for ongoing education/training and are more likely to support new ideas. Holland and others (2001) say “a good steering group usually leads to better communication and improved industrial relations and is often the only forum where the needs of manual workers are focused upon, and in which people from all levels in the organization get together” (p. 52). Committees can also help resolve conflicting goals (Massachusetts Workplace Literacy Consortium, 1999) by hearing from all the partners at the table.

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**Consider...**

*Human resource staff are often the first contacts for workplace educators and can see themselves, not committees, as responsible for setting up education/training activities. In many jurisdictions, committees are mandated by the government funder and organizations have to comply to receive financial support. How crucial is a committee, especially when Ontario educators have to sell a company on covering all their costs for workplace education?*

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Perhaps a committee is even more important if the company is covering all the costs. A committee is the best vehicle for getting buy-in from all levels of the organization and for promoting education and training. The message comes from co-workers not just from an external educational institution or independent trainer. Educators can rely on the committee to steer the initiative through the rough spots with their understanding of the culture of their workplace and of the supports and barriers for education at work. As Holland and others (2001) say, “There are very few programmes that are problem-free and it is important to have a forum in which to discuss these and decide strategies for overcoming them” (p. 52).

Nevertheless, a company may refuse to set up a committee and prefer to establish a one to one relationship with the educator and a staff person. In this case, the educator heads into an outreach and planning cycle with little internal support beyond management and should be aware of areas of resistance and trouble spots that might appear. Perhaps the contact person would be open to having some ‘supporters’ (workers, union representatives, supervisors) work together in the outreach and promotion phase at least. In organizations that don’t use a committee process or other procedures to promote democracy in the workplace, the workplace committee could be a hard sell. Move slowly and try to keep the door open to new ways of working together.

### ***Equity and Access***

The literature focuses on two main areas of practice: equity is respected and promoted in partnerships, and basic skills programs are accessible to all employees. Secondary focus is given to promoting diversity at the workplace and in the distribution and marketing of literacy services.

Partnership arrangements are based on equality with all interest groups participating with equal voice. The CLC (2000) and the United Food and Commercial Workers (1993) both state that unions are an equal partner in an

educational initiative; if not, “just say no.” In non-unionized environments, workers on committees should be equal partners in discussions, decision-making and actions undertaken. Yet, Taylor (1998) found in his study of eighteen cases that workers wanted more decision-making opportunities, pointing to the difficulties of full participation by workers. Cichon and Sperazi (1997) also found that workers can feel less powerful in formal meetings and may not participate fully.

In regard to accessibility, the literature emphasizes that programs be open to all employees who are interested. Open access means that the company, union and educators have to consider learning opportunities for different levels of the organization, availability of programs for different shifts, access for people with disabilities, and time-share arrangements which include rather than exclude participants. O’Connor (1992) says that accessibility also requires consideration of those people most disadvantaged in their opportunities for education.

The Massachusetts Department of Education (2001) has this indicator for their standard on learning opportunities and support services in workplace basic education programs:

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*There is a non-discriminatory process for selecting and placing interested students. All those who want services can access instructional opportunities/support services consistently because the program has policies and incentives that support participation without jeopardizing coverage, production or service delivery and family responsibilities. (p. 7)*

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Good practice documents from the mid 90s tend to include more detailed statements about the promotion of diversity and equity in all aspects of the process. The participants at the 1995 national think tank agreed that “equity issues

should include consideration of many elements including but not limited to: race, religion, culture, labour and management, gender, regions, urban/rural, age, language and education.” They also agreed “we must not perpetuate barriers and should act as a catalyst for creating an equitable, diverse workplace in a respectful way by identifying systemic barriers and working towards solutions” (McLeod, 1995, p. 14).

Taylor (1998) looked for evidence of equity in light of the think tank’s statements. For his study, he defined equity as “programs acting as agents in creating an equitable workforce.” He found that organizational barriers to equity existed in the “hiring and promotion policies of many companies. It was felt by a number of employees that even with basic skills training their movement up the work ladder was hindered.” In regard to marketing internally, he also found that in about one third of his case studies, “employees felt that middle management perceived the program as a perk and that it was not promoted enough in the organization.” (p. 13)

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**Consider...**

*Even in unionized workplaces, workers who are members of joint committees often do not play as active a role as staff, supervisors and managers in the decisions and activities of the committee. While we say partnerships are about equality, in fact there are many barriers to workers participating fully — their schedules, lack of replacement workers, their access to computers and other technology, and often their inexperience with joint committee work in their company.*

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Variations on these barriers exist in many workplace education initiatives. It might be helpful to address these barriers up front in initial discussions with the company, union and other partners. What experience does the organization have with multi-party committees, how have

they operated, what ground rules are in place and what success models do they have? Very few companies are in a position to replace workers who are at committee meetings; usually co-workers fill in, which requires that good relations be maintained throughout the process.

Committees and other types of partnerships usually decide what roles are possible in their work environment. For instance, if workers do not have access to computers, then other committee members will do the paperwork required for the process. Workers have more access to employees so their role is crucial in outreach, promotion and involvement among their co-workers.

Confidence and full participation of members with less experience is an important concern. Some unions are tackling this issue by trying to give their workers education and development opportunities for joint committee work. Growth in this area is incremental and each experience builds knowledge and skills. As educators, we may be in positions to offer focused help to members with less experience and less confidence. For instance, we could offer feedback on a dry run for an upcoming presentation to employees. We could also ensure that our facilitation opens up spaces for members to contribute what they know best and encourages their perspective on issues to hear voices that would not otherwise be heard.

### ***Flexibility and Variety in Delivery***

Good practice in delivery focuses on meeting the varied learning styles of the participants within the options afforded by the workplace. In theory, these options for education could be numerous: tutoring or coaching individuals, self-paced or group learning, computer-assisted instruction, on-the-job learning, team teaching basic skills with a job trainer, distance education or the familiar classroom based model. In practice, the work environment and the preferences of the participants would determine which ones or which combinations would actually be possible and successful.

With any model, flexibility requires that educators try to provide the most supportive environment with the human and material resources available.

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**Consider...**

*Educators may well be more interested in different learning models than the company and the participants. Education, especially in language and literacies, is often associated with tutors and classrooms rather than drawing on other models of informal learning and coaching more common in the workplace.*

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Meeting the expectations of learners might mean that opportunities include more traditional delivery with tutor and classroom delivery. Sometimes it takes experience with an education provider to trust in different options that might suit the type of work organization and the way people learn at work. For instance, in a high performance workplace with cells of workers, the educators were considered essential to the improvements in the company's communications. They decided to experiment with shop floor learning — going out onto the floor and being right in the middle of where people normally work and learn. This model fit in with the informal learning that was always going on as people consulted with each other in their cells. At the same workplace, the educators worked with staff and cell leaders by modeling and coaching skills needed for successful teaching and learning — for example, using clear language and visual learning and following the action — reflection — action cycle. They succeeded in moving the company and the workforce to a new understanding of informal learning by building awareness of when and how people learn best.

***Suitable Location and Timing***

Location and timing, a subset of accessibility and delivery, gets specific mention in a number of good practice statements. Here, the emphasis is on the most accessible, private and suitable location — on or off-site. Likewise, the

timing aims for convenience and to accommodate the largest number of participants.

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**Consider...**

*An educator is negotiating with an employer for a language and basic skills program. The employer shows her the area that the company can provide for learning — the open cafeteria, available during the busy lunch hour when the workers could eat and learn. Just say no?*

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O'Connor (1992) says that we should only agree to use a location exclusively set up as a training area, definitely not a lunchroom. He would say no and so did this educator. This type of arrangement sets the program up for failure by its lack of privacy, noise, inevitable interruptions and lack of respect for learning. Some companies can offer boardrooms or multi-purpose rooms or set up learning centres on the premises. Off-site locations in the vicinity may be more accommodating. For example, a large company began renting spacious, bright rooms in a nearby church for their own training. The language and basic skills sessions were offered there as part of their regular employee training.

**Shared Time  
and Costs**

A few good practice statements specifically mention arrangements for shared time and costs. The employers and participants demonstrate their commitment through shared time, release time, stipends or bonuses. The minimum is 50% time and wages contributed by the employer and 50% of time contributed by the participant. Full release time (100%) is strongly recommended by the most recent statewide partnership training initiative in Massachusetts as well as by their department of education. While these initiatives are tied closely to economic and community incentives, they still recognize learning serves both personal and work-related needs and interests.

In certain cases, unions have negotiated time and cost agreements through their collective agreements or established training trust funds, which could cover basic education programs as well as job training. This arrangement could give workplace education a recognized place in the larger training system.

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**Consider...**

*Without shared time agreements required by an external funder or the union, how far can we push this demonstration of commitment? Consider this scenario: a company is only prepared to offer education on 100% volunteer time. In the ONA, employees at all levels said they expected to see some shared time arrangement at the very least as recognition that learning is valued and benefits the company as well as the participants.*

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The ONA presents a strong case for the employer to show a commitment in work time and to recognize the value of learning. We can use the employees' responses to open an important area for discussion and for understanding. What is the history of education and training at this company? What employees and what kind of training have been recognized and supported in the past? How much work-related material is expected to be included in an education program? If the focus is solely on learning for personal interest with no expectations from the employer for application on the job, there might be a case for volunteer time. But many companies share time even for personal learning since they know they gain just by improving morale. This employer would have to find ways to demonstrate recognition for the interest and commitment of his employees to lifelong learning. What other costs could the company cover — instructor's fees, materials, space? In the end, will people sign up for programs or be put off by the company's refusal to share time?

**Clear Marketing**

The few good practice documents, which include marketing, look at both marketing to the company and then promoting the learning opportunities within the company to the workforce. In both cases, marketing materials and activities use clear language and design aiming for engagement and recognition. In marketing to the employer, materials and presentations clearly communicate the provider's approach to adult education as well as achievable goals and benefits to individuals and organizations. Bradley and others (2000) recommend that marketers "identify the link between training outcomes and financial benefits to industry." But, in an interview, one educator warned, "make sure you can do what you say you will." Within a company, participants in the national think tank agreed that "wherever possible, involve peers for marketing, recruitment and counseling in a company and union. It is important to create a spirit of trust, respect and mutual cooperation" (McLeod, 1995, p. 21). Peers are most easily brought into the process through a workplace committee that is visible and active in all aspects of the program.

**Consider...**

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*Financial benefits are often thought to be the most attractive element in marketing education and training. In the Bradley quote mentioned above, workplace education (language, literacy and numeracy) is part of larger industry 'training packages' in Australia and perhaps can claim some role in the ultimate financial gains to a company. In Ontario, how far can we go in marketing to the bottom line? Increases in productivity, reductions in errors and absenteeism? Are these our best hooks for marketing language and literacies? Can we attribute gains in productivity to a basic skills program?*

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Studies from the Conference Board of Canada and other research organizations try to make the link between education and financial gain. These studies deserve our attention with a critical eye. How was the data gathered,

tabulated and analysed? Does this approach support our case or get us into a difficult spot when we set goals for programs and evaluate the outcomes. Are we ready to prove that productivity has increased? If so, how? Or that absenteeism and errors have been reduced thanks to basic skills programs? If so, how? Certainly, these financial gains can be an impact of the program in some cases. What other factors would probably be part of the accounting process? Has the company measured the success of its other training programs on this basis? If so, how? What were the results?

Marketing programs and setting goals for learning on the strength of these financial results can be dangerous for both the participants and the educators. One workplace educator suggests, “Let the company continue to do its regular accounting and monitoring of productivity in all aspects. If things improve, we are part of the reason why. If they don’t improve, then we have to keep looking further as the company does for all the factors that play into it. When one of the companies we were working with got back a big rebate for the lowest number of accidents for the year, I said, yes we’re part of that. In fact, the rebate covered the cost of the education programs.”

## Defining Your Own Good Practice Guidelines

As literacy networks across Ontario become involved and gain experience in all aspects of workplace education, networks and delivery agencies may want to define their own good practice guidelines. Those guidelines would reflect the values, experiences and interests of the partners in their own communities. A network can plan to review good practice guidelines individually or collectively with other networks active in the field. This process could entail a review of existing good practice and a defining of new guidelines by the community/regional partners in workplace education.

Two good practice documents suggest ways to examine and define your own good practice: Steel et. al., (1997) give some general directions for engaging with good practice ideas; and, the 1995 national think tank report concludes with suggestions for developing your own process.

In their article, “Towards a Framework for Good Practice,” Steel et. al., begin by saying that good practice evolves out of discussions, decisions and work with companies, unions, employees and other partners in developing workplace education activities. They suggest writing down the principles or guidelines which have developed throughout a project that reflect the collective experience. This document can be a reference, a first statement of guidelines in your own community, and reviewed regularly. Then, they suggest three avenues for further development: talk about it, read about it, write about it.

- ▶ **Talk** with a group of people representing the partners in your programs. Try to increase understanding about different perspectives on contentious issues. Talk to experienced educators about their good practice guidelines and how they have resolved difficult issues.
- ▶ **Read** what others have written about their practice. Check the references attached to this report and follow up on any references that caught your attention.
- ▶ **Write** about your guidelines and your experience in newsletters and web conferences. Assist business and labour in writing policy for workplace education which could include good practice guidelines.

McLeod, writer of the national think tank report, concludes the report with suggestions for thinking about and planning your own process. She recognizes that some providers “have a definitive set of guidelines, others demonstrate good practice based on informal understandings” (p. 23). She sees the report as a catalyst for stimulating discussion, review and formulation of good practice guidelines for others.

She offers six generic questions for planning your own process (pp. 23-24). Building consensus among the representatives at the table is important for each question and at each stage.

**1 What stage are you at with respect to having consensus on principles of good practice?**

- current status of your formal or informal guidelines

**2 What are your goals for good practice?**

- review existing guidelines? start from scratch?

**3 What process will help you achieve your goals?**

- bring a representative sample of partners to the table
- design a process that meets your goals and time/energy commitments of the people you want to include
- modest to elaborate activities: discuss at regular meetings; include sessions on good practice in conferences; strike a committee to investigate, report and recommend; plan your own think tank retreat
- written statements are necessary for getting consensus

**4 Who should provide feedback on a draft version of your guidelines?**

- other interested partners not at the table; other educators in the field

**5 How will your guidelines inform program policy and practice?**

- consider the impact on different aspects of your program: hiring, staff development, curriculum development, funding, participants in education programs

**6 How can you keep your guidelines current?**

- good practice is not static; ongoing review is recommended

## References

1. Sue Folinsbee defines workplace education as a “generic term to describe workplace literacy programs that address the reading, writing, numeracy, second language learning and basic computer needs of the workforce. Educational programs that address these needs may be job specific, or a combination of job-related non-work related, and they may be for any member of the workforce. They may take place on or off site in various formats. They may be offered by the union, jointly with management or in the community. Adult educators or peer trainers may deliver them” (2000, p. 4).
2. The term ‘educator’ is used throughout. I based the use of this more inclusive term on the decision made by the Literacy Worker Recognition Task Force of the Ontario Literacy Coalition (OLC) in 1998. This term is used in the Adult Literacy Educator’s Skills List to include all sectors in the OLC.
3. “Literacies rather than ‘literacy’ is used to indicate the expanding role of texts in different forms — print, visual, electronic as well as the different interpretations of literacy by the many cultural and linguistic groups in the world today.
4. Workplace education is also referred to as basic skills, essential skills or workplace communications.
5. Workplace needs assessment (WNA) is another name for an organizational needs assessment.
6. See Whincup, *Workplace Education Development* (2001).
7. See Barton’s *Literacy* (1994) for a clear, readable version of a social view of literacy.
8. See, for example, Despins, 1997; McLeod, 1995; Massachusetts Department of Education, 2001.
9. See the plans for professional development from the Corporation for Business, Work and Learning and MATSOL, 2001.

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### **Resources On-Line:**

Consortium for Worker Education, New York City:

[www.ed.gov/offices/OVAE/AdultEd/](http://www.ed.gov/offices/OVAE/AdultEd/)

Massachusetts Commonwealth Corporation: [www.commcorp.org](http://www.commcorp.org)

Equipped for the Future Special Collection: [www.nifl.gov/lincs/collections/eff](http://www.nifl.gov/lincs/collections/eff)