

The background of the entire page is a photograph showing the silhouettes of several people jumping over a gap between two large, dark, irregular shapes that represent a chasm or a barrier. The people are captured in mid-air, with their arms and legs extended, suggesting a leap or a jump. The sky above is a bright blue with scattered white clouds. At the top of the page, there is a dark red horizontal bar containing the title text.

# Perspectives on Labour Shortages

## **Exploring the Education-Jobs Gap**

Friday, October 24th  
to Sunday, October 26th, 2008

University of Alberta  
Edmonton, Alberta

# Perspectives on Labour Shortages: Exploring the Education-Jobs Gap

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# Welcome

The 3<sup>rd</sup> Work and Learning Network conference, *Perspectives on Labour Shortages: Exploring the Education-Jobs Gap*, comes at a tumultuous time in Canadian history. Ontario's manufacturing sector continues to feel the effects of the migration of manufacturing jobs to developing countries, and has recently taken a real tumble in response to a rising Canadian dollar. At the other end of the spectrum, an oil boom in Alberta has created labour shortages, and the increasing use of foreign temporary workers in the province.

In recent weeks, world-wide economic uncertainty has followed the dramatic collapse of the American credit market, and of a number of American investment banks. We can expect that many of the questions we take up in this conference will evolve in the coming months in response to this global-scale economic shift, and potential recession.

In Canadian education, high school completion is an ongoing concern, as is creating effective transitions to post-secondary education in high-needs areas such as skilled trades, medicine, nursing, and the hi-tech sector. The face of higher education is changing, as professional organizations, the private sector, governments, and Canada's universities and colleges seek ways to integrate accredited learning into new patterns of work marked by regular/cyclical transitions between work and learning. PLAR, alternative routes to education, distance learning, and increasing the number of accrediting institutions are among strategies that reflect new thinking about the relationship between higher education and work. Many of these are discussed by our conference participants.

Our presenters also recognize that Canada's labour market is characterized by some key inequities. Across Canada is a growing awareness of the underemployment of permanent immigrants, many of whom arrive in Canada with needed skills only to find their credentials and previous work experience unrecognized or undervalued in the Canadian labour market. We need policies and practices that support immigrants in obtaining work commensurate with their qualifications and experience. Our authors also examine other marginalized workers: those lacking quality education, older workers, persons with disabilities, visible minorities, and First Nations people. The growth of our Aboriginal youth population and recognition that our systems of education have not, in the past adequately met the needs of Aboriginal students has led to more research on Aboriginal learning, more efforts to support Aboriginal learners at all stages of their education, and more programs to encourage Aboriginal employment.

It has been widely recognized in research and policy that our work and learning is no longer characterized as linear, with a period of education or training in young adulthood to





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# Work and Learning in Globalpalosa

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**Abstract:** Globalization has come to define 21st Century civilization as a result of progress in technology but at the cost of information overload for individuals and organizations. We need a cybernetic management paradigm for work and learning in order to manage the complexities of the new world order.

## **The Problem: The Work – Learning Gap**

How can learning keep up with the demands of the rapidly changing workplace? The pace of globalization, workplace automation and information overload seems to broaden the gap between job requirements and learning. At the same time, however, advanced technology may be on a trajectory to surpass human labour altogether. When old solutions no longer work we need to try something different. Let's get to the essence of these issues. Learning is the process by which humans gather information and knowledge from their environments and from themselves. Work is the process by which humans methodically position themselves in their environments to take advantage of opportunities and avoid threats. Work and learning naturally go hand in hand. Technology is everything that stands between humans or between humans and their natural environments and is designed to reduce human labour and increase productivity. We need to build more intelligence into our system.

Information, communication and transportation technologies are facilitating globalization. Globalization is the rapid dissemination of things and ideas from local origins toward all people living in all parts of the globe. It is dominated by national and corporate powers that innovated, automated, and marketed early in the 20<sup>th</sup> Century. Globalization in all of its manifestations is the major contributor to complexity in modern living. There are more people, products, connectivity, and kinds of relationships. Globalization and its attendant complexity are defining the human condition. Technology innovation, commercialization and adoption are rapidly changing the workplace. People are becoming information and knowledge workers instead of manual labourers. Their employers are largely information processing organisms adding to the global value web by working smarter, not harder.

Mankind is experiencing super-exponential growth of information. Collectively, published information is doubling in a matter of months. Personal capacity for managing information does not grow exponentially. The brain has limited memory capacity and limited processing speed. Not only are workers incapable of keeping current with complexity, but our leaders can fall victim even with access to the vast resources of their respective organizations. People also experience a *loss of meaning* as a result of getting a



smaller proportion of the whole picture. Meaning depends on finding coherence in the context of other relevant ideas or knowledge. In a world of information overload, it gets increasingly difficult to find and select the most appropriate links to provide maximum meaning.

*Complexity*, a natural outcome of growth of populations, communications and technology, is a measure of the number of things and events and their relationships. Complexity is a measure of information. Technology can be quickly introduced into the workplace, but learning to manage the complexities of technologies takes more time. The externalities of technology are rarely measured, yet they are accumulating systematically just as surely as CO2 in the atmosphere and the growing gap between rich and poor.

### **Analysis: Globalization, Complexity and the Work-Learning Gap**

Globalization uses standardization of technology to permit mass production of goods for mass markets of people with standard needs and wants. This helps reduce variety but increases the number of product units among us. Nearly all aspects of the human condition now revolve around labour saving technologies – in agriculture, food, clothing, housing, health care, education, transportation, recreation– and of course, the manufacturing and services to support all of the above. Workplace technology forces workers to migrate, often to ever larger urban centres, and retrain in other occupations or career paths that are often less rewarding. Off shore manufacturing, that has also changed our workplace, consists of technically advanced plants managed by the latest in management science. China now faces a labour shortage in certain occupations. There is no escape from advancing technology.

The world is becoming one giant interconnected value-adding factory web. Industry clusters are gravitational poles that attract like-minded talented people. Workers are transitory, making career choices based on personal and professional criteria for non-linear career paths. International standards in education promote labour mobility. Global supply chains become efficient conduits of goods and services using international trade corridors and agreements to facilitate low cost shipment of goods. Transportation and communications technologies improve mobility and eliminate distance. Large concentrations of capital can be accessed for investment anywhere.

The complexity of modern civilization's solutions continues to grow (Tainter, 1988) at a quickening pace. We in the 21<sup>st</sup> Century now have finely tuned the innovation and commercialization of technologies to the point of planned obsolescence, teasing out every possible combination and permutation of every synthetic material, process and application. Production and distribution are now applied sciences of economies of scale from just-in-time delivery to shorter product life cycles.

We live in unprecedented times. Our cumulative patterns of work and learning are evolving so that we are now facing what may be called *meta-problems*. Meta-problems are unforeseen problems that emerge from our cumulative inaction or compounded inappropriate actions. Cumulative '*cultural lag*' (Ogburn, 1922) between introduction of

technologies and eventual soft cultural adaptation may be growing toward a tolerance threshold. No one knows the tolerance thresholds for compounded systemic stresses related to work, technologies, information overload, and other factors.

A big gap of concern has been between work and learning with advanced technologies. Increasingly, work consists of controlling technology. Software can be copied infinitely, cheaply and instantaneously without loss of information. Computers can be cheaply mass produced and distributed. Educating and training each worker takes years, however. A three-day course can cost thousands of dollars and improved performance results are not guaranteed. Intelligent technology is being used to close the work and learning gap in technology occupations. Higher control functions are being automated leaving humans to do still less work. In the longer term, *fewer* skilled people will be needed. Computers are designing better computers. Machines are learning to become better learners. Whatever can be economically automated will be automated. Humans will have to be automated with electronic chips to remain viable economic players.

The world is polarizing at an exponential rate along the lines of *have* and *have-not* economic regions. The innovative geniuses that create and adopt technologies migrate to the coveted industry clusters in a few hot spots around the world (Florida, 2004), while the vast majority are in various levels of cultural lag. The rich urban regions develop a convection current drafting talent away from hinterlands and building leading universities and modern cultural amenities. Poor and largely unskilled farmers, driven from the land by highly productive agri-business, flock to regional cities in search of any work to be had. Inevitably political power follows economic power. The power to educate is also shifting away from state to corporation.

### **Problem Solving Frameworks**

A number of solution frameworks have been used to manage complexity. In general terms we can call these frameworks *intelligence*. One important component of any intelligence is the ability to recognize similarities and differences. The intelligence of scientific enterprise lies in its ability to recognize similar patterns in nature, patterns that repeat though they may be in very different media. It is by classifying these fundamental patterns that we can simplify our world views and thought paradigms. Herein lies hope for a solution to the problems of managing exponential growth of information and complexity and for reconciling people and technology.

*Bureaucracy* is a way of increasing capacity to manage complexity using specialized knowledge. When two or more people work together, however, their collective intelligence is not additive. If members of small group don't get along the group IQ may be less than that of the slowest member. Nevertheless, it may be possible to generate group synergy so that the intelligence of the organization can exceed that of the sum of members. Workers inundated with data keep focused on the task at hand by *filtering* out extraneous information. They run the risk of missing something important as they take less time to observe long term trends and patterns.

Another way to manage complexity is to *reduce the duplication, or redundancy*, of language and concepts found among the diverse scientific disciplines. This can improve the efficiency and effectiveness of information processing. It is directly analogous to data compression in computing science. Political science, for example, might adopt the language of systems engineering when talking about power transformers and transducers. Economists might try to use the language of environmental sciences to talk about energy flows.

Yet another way to simplify is to *formalize* and *standardize* everything for convenience and so that everything can be measured and managed as a *commodity* and to achieve some economy of scale. In globalization everything is part of production, consumption or a transaction between the two. The problem here is that these tend to reduce diversity in ways that are not necessarily in the long run best interests. Standardized radio and television signals restrict innovation in communications. Standardized credentials can limit use of some great talents.

Science is a formal approach to create order out of the chaos of possible ideas about reality. There are two kinds of scientific thinking, the *pure science* of exploration and discovery and the *applied science* of invention and management. Pure science seeks to understand what exists. It generates hypotheses and conducts controlled experiments to develop theories and laws that identify, describe, explain and predict phenomena. Applied science seeks solutions to real world problems. It uses the body of knowledge accumulated in both pure and applied sciences to manufacture new things and events that humans want, including technology and methodology.

When we study human civilization from a disciplinary viewpoint with the intention of learning more, it is fair to isolate and abstract various phenomena and label them as economics, politics or culture. Few public policy professionals have studied how the component systems of community or civilization are interdependent. University programs in “applied social science” will identify social work, counselling, criminology, social policy, sociology, community development, and so on -- a mix of apparently disconnected subjects. When we want to *improve* our social world we need to integrate what we know from all sub-disciplines and use a holistic *management* approach. Management studies have been limited to formal organizations such as businesses and government. We could integrate successful management and social science concepts and principles to develop best practices in family, group, community, societal and global levels of organization. In each case we should be viewing collective human behaviour as a system of economic, social, political and cultural phenomena.

Management has a history of providing solutions to real life problems. It evolved out of *professional practice*, not science. In management we talk about organizational behaviour, culture and politics, and micro-economics. Traditional social science disciplines each have their own histories. Each has created theoretical models to explain, predict and control certain component systems within communities and civilization – economics,

politics, society and culture. None of them purports to explain, predict and 'control all component systems.

Social sciences and management study the same phenomena from different perspectives. The organization of events in *time* is studied in ergonomics, time management as well as history. The organization of *space* is studied in geographic information systems, urban planning and human geography. *Energy* is studied in micro-economics, supply chain management, financial management and macro-economics. *Form*, or *information*, is the subject of interest in organizational culture, human resources, management information systems, accounting, and cultural anthropology. *Communication*, the main subject of sociology, especially symbolic interactionism, is studied in organizational behaviour, marketing and promotion. *Control* is of interest in organizational politics, business strategy and policy, and of course, political science. Operations research, also known as management science, is involved in the study of all organizational phenomena.

Throughout all conceptual frameworks runs a common assumption with which we must come to terms. Our worldview is *anthropocentric*. We know humans are animals. We know that what makes us different from other animals is not magic. What makes us most different from others is our capacity for symbolic communication. It is this single factor that, in combination with other animal traits, such as social bonding, makes civilization possible. But we have developed social sciences with hidden assumptions about our special place in the universe. The social sciences evolved in a time when the full consequences of our animal heritage were not well appreciated. It is now becoming clear that we are not titans with the right to rule the planet. We need to conceptually reintegrate ourselves into nature and the ecosystem of our planet.

### **Cybernetic Solutions**

To solve the problems of complexity we do not need more complexity but a new simpler paradigm of how our world works. We must reflect on our assumptions about the nature of civilization and the way that we have traditionally organized our thoughts about it. We need a theoretical paradigm that assumes we are a part of a system that has a life of its own. We need to frame the problems of work and learning in a radically different way, building on concepts and principles that are common to all organized phenomena. Fortunately the foundation of that paradigm exists in *cybernetics*. Cybernetics is a science that has specialized in concepts, principles and models that describe, explain, predict and control all living and thinking things. A more effective and efficient solution involves a classical paradigm shift.

Cybernetics takes a more general approach to problem-solving than any other scientific discipline. Cybernetics sees the world in terms of its systems of elemental components of time, space, energy, form (information), communication and control. Cybernetics introduced the concept of feedback loops are now so important in all studies of development processes, communications, education and performance improvement.

From a cybernetic viewpoint, problem solving can be seen to have a hierarchical structure. The many routine problems we encounter at the bottom of the hierarchy are solved with routine solutions, while less frequent, non-routine problems at the top of the hierarchy get solved with non-routine solutions (Simon, H. 1965). At the same time, good general solutions find their way to the top to dictate specific applications at the bottom. It is important when assessing a problem situation to determine the appropriate frame of reference. It is important to ensure that you are dealing with root causes of the problem, not a sign or symptom of the root causes. We need to identify the appropriate *level of generality* of the problem. If a similar problem emerges routinely, develop a solution that is equally generalizable.

To maximize efficiency in any problem-solving task, we generally begin at the bottom of a problem-solving hierarchy on the assumption that its business as usual, and progress toward the top as needed. As a result of this common approach, most people are comfortable and familiar with routine solutions. They are less comfortable and competent when routine solutions fail and they are forced to consider more abstract approaches. Over time, we create abstract ideas and generalizations from patterns repeating among various routine problems and solutions. The higher level of abstract reasoning will reveal a wider range of similar and different perspectives on human labour, technology and learning. The resulting solutions are policies that take the logical form of “*If...then...*” statements. For example, “*If **problem of general form A** exists then apply **solution X***”. These policies create a sense of coherence among diverse solutions.

### **Structure of Reality and Knowledge**

We want a paradigm that efficiently and effectively represents how the world works. The world consists of energy and information bundled up in *entities* and *events* against a backdrop of time and space as reflected in mind. There are two kinds of change (difference) – *causation* and *logic*. Causation is a change in form while energy is conserved. In logic, the substance (energy) is changed while form (truth) is preserved in a different substance. The human brain, or any brain, is an information processor that operates on logic driven by affect. As such it copies information by use of logic so that the network of neurons corresponds to the forms, or patterns, perceived in reality. The mind is filled with perceptions, information, ideas, opinions and knowledge, referred to collectively as knowledge. Knowledge is believed to a) correspond to entities and events that are external to the mind; b) be internally logically consistent; and c) form a coherent body wherein the whole is greater than the sum of the parts. Mind also contains affect, expressed as emotional feelings, drives, and attitudes that are related to values.

Cybernetics shows how information and communication control systems. The first Law of Organization is the *Law of Requisite Variety* (Ashby, 1956). This Law states that in order for any organism, organization or other intelligent machine to survive, it must be able to match the *variety* in its environment, i.e. it must have at least one-to-one *correspondence* to things and events that create opportunities and threats. This applies to

all levels and forms of life, from single celled organisms to teams, corporations and the United Nations. It also applies to informal organizations such as communities and civilizations.

Work and learning encompass virtually all of human activity. There is a continuous logical circuit of information between the unknowable reality, our brains and back to reality. We know information as patterns of relationships among entities and events. Knowledge is to accurately, precisely, efficiently and reliably mirror the patterns of relationships that exist in our environments so that we can decide actions that will position us for pursuit of happiness and survival. Our nervous systems have sensory motor, cognitive and affect components so that we can collect information, assemble it into a meaningful model of reality and then decide and activate behaviours that best situate the body for environmental opportunities and threats.

### **Conclusion**

If humans are going to keep pace with the changing world around them, we will need to simplify the ways we think about our work and about things in general. We need a system of thinking that is more universal and less specialized by discipline, a system that will be taught in schools and used in the workplace, a system that permits experts from diverse education and training backgrounds to communicate effectively and efficiently, a system that will make use of the most efficient technical, recognizing that nature uses similar principles throughout various levels and types of organization.

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# **The European Qualification Framework for Lifelong Learning: Challenges, Consequences and Action taken in Germany**

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**Abstract:** The paper outlines the German versus the Anglo-Saxon approach towards competencies and how this gap inflicts the implementation of an NQF in Germany. The current debate around the introduction of an NQF in Germany will be summarized and commented upon.

## **Introduction**

Since Europe is moving closer together a number of policies were released that address the need for a common qualification framework. Its purpose is to ease the comparability, transferability and mutual recognition of vocational qualifications and competencies between the European countries but also in the educational system of one country. Employers should be able to recognize and categorize the level of qualification that has been acquired by an individual. The Copenhagen declaration of 2002 marked the beginning of the development of a European Credit Transfer System (ECTS) in the field of vocational education and training (ECVET). It intends to provide a consistent framework that would ensure the transparency of competencies and qualifications. A similar system for the transfer of credits in higher education has been implemented already. With the framework common criteria for educational quality and the validation of non-formal and informal learning based on common principles should be installed (Grollmann, Kruse, & Rauner, 2005). In the Komunikè of Maastricht in 2004 the goal of mutual recognition of vocational degrees has been affirmed (Directorate General for Education and Culture, 2004) and the development of a credit transfer system continued. The policies are based on Europe's attempts „to become the most competitive and dynamic knowledge based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion“ (Lisbon European Council 2000, 2). Although the framework supposedly functions as a guideline that in a way standardizes the process of accreditation, the European Union has emphasized that it is not meant to be a tool for the harmonization of degrees (Meyer, 2006). Therefore, many European countries are taking careful steps towards the creation of their own National Qualification Framework (NQF), because the involved parties hesitate to give up structures that had been developed over long periods of time and are historically embedded in the overall educational system. A lot of debate among educational stakeholders, policy makers, and scientist is taking place since the policy was released which has not lead to a common conclusion yet. Instead, various countries are starting to experiment with models of qualification frameworks and credit systems in their vocational education and training (VET) systems. Germany also has started

an initiative to test in various pilot projects how a credit transfer system in VET could work. The particular challenge faced is the recognition of competencies – a concept that cannot be mutually defined among German scientists and VET stakeholders nor is there a common sense about it across Europe.

The EQF consists of eight levels of knowledge, skills, and competencies and targets the categorization of learning outcomes. An NQF also needs to recognize the individual learning biography, informal learning, and practical work knowledge. The levels 6 to 8 of the EQF are oriented on the Bologna specifications for higher education („Dublin Descriptors“). They should be used to improve the permeability between vocational education and higher education (Europäisches Parlament und der Rat der Europäischen Union, 2008). Important for the NQF is, that all degrees that can be acquired in a country, need to be related to each other. The overall intention is to view the different educational streamlines as one holistic system.

In this paper I will describe the German versus the Anglo-Saxon approach towards competencies and how this gap inflicts the implementation of an NQF in Germany. The major discrepancy occurs in regard to the German broad concept of occupational socialization which extends the task-oriented evaluation of learning outcomes. Afterwards I will summarize the current debate held in Germany around the introduction of an NQF based on the EQF and comment the discussion with an outlook on future research and policy issues.

### **The German Concept of Competencies Versus the Anglo-Saxon Concept of Competencies**

One of the central differences in the understanding of the concept competencies between the Germans and the Anglo-Saxons seems to be that competencies do not describe the learning process, but the results, and are therefore outcome-oriented, while the German concept of competencies focuses on inputs (Bohlinger & Münk, 2008; Clement, 2003; Vonken, 2005). From the perspective of the German speaking countries the Anglo-Saxon concept does refer to competencies and the curricula that support their development, but it does not determine competences which includes that it does not reflect the individual learning and educational process and its contents (Clement 2003).

Central to the approach of measuring competencies is the idea that learning outcomes cannot just be measured according to acquired degrees but need to be captured in competencies. Accordingly, there must be the option of recognizing competencies that have been acquired at the workplace. As a consequence the German system that traditionally strongly focused on degrees needs to be modified in order to define degrees in a neutral way and document the learning outcomes according to the type of education received and the type of qualification acquired, both in measurable terms. The qualification framework, therefore, has to serve as a kind of currency that can be used for general as well as vocational and further education (Rauner, 2005). Learning outcomes are characterized



by the components knowledge, skills, and competencies. Descriptors for competencies in the EQF are the degree of autonomy, responsibility, and jurisdiction.

On the other hand, competencies can refer to the ability to master something. The Anglo-Saxon term “qualification” in the EQR is consistent with a bundle of competency standards or what in Germany is considered to be a comprehensive description of an occupational profile (Meyer, 2006). The German concept “Handlungskompetenz” (action competence), which means as much as the ability to act responsibly in various situations at the workplace, is not adequately represented in the term “competence” used in the EU policies. The recommendations for the implementation of the EQR do not explicitly outline demarcations between various terms and their definitions – so that they cannot be clearly separated from skills, knowledge, and competencies (Hanf & Rein 2007).

Bridging the gap between different contextualization’s of the term “competencies” remains a challenge. The German scientists are reluctant to accept an adoption of an EQF with an Anglo-Saxon approach towards measuring competencies and rating qualifications. They claim that their understanding of “Bildung” in a universal sense (which is more than what the term “education” comprises) extends the Anglo-Saxon more pragmatic approach towards education. In the process of defining the concept cultural implications play a major role in the development of an understanding of the term. The specific design of and approach to vocational education and training in Germany requires the development of a new precise competency model (Drexel, 2005). The social partners such as chambers of trade and commerce and labor unions emphasize in their argumentation that the principle of occupation which includes the development of an occupational identity through the socialization at the workplace during an apprenticeship and afterwards during employment needs to be maintained. The individual should not just been functionally adapted to the requirements of business and industry (Drexel, 2005). The danger that is often expressed would be to view education solely under the criteria of providing employability and being economically viable. The ability to act responsibly at the workplace includes the aspect of employability, but just focusing on employability would exclude the participative active shaper and responsibly acting individual. The social partners also emphasize the equal value of general and vocational education. That means that all levels in the qualification framework can be achieved by either line of qualification (Kremer, 2007).

### **Challenges to the Development of an NQF in Germany**

The development of a comprehensive credit transfer system that could be adapted in each European nation poses a variety of challenges. Besides the fuzziness that remains around the term “competencies” the heterogeneity of educational systems and the large number of different educational institutions, educational providers, learning places and educational programs requires an extended probation and implementation period. First, a transfer system needs to be tested in order to find out if it would be recognized among all the stakeholders in one country and afterwards in the European Union (Kruse, 2005). Even

more so the curricula design for various occupations needs to be changed in order to reflect the different degrees or levels of action competence. The competencies acquired at each level must be comparable across educational careers, institutions, states, and countries. From a pragmatic point of view and considering the wide range of possibilities that each country has to offer it becomes understandable that particularly representatives of the Anglo-Saxon model are promoting the simplification of the model so that countries can use it as a common base and build upon it.

Grollmann (2008) and his colleagues from the Institute Technology and Education in Bremen advocate for an alternative classification system of competencies that consists of two strands: One educational strand would be the formal acquisition of academic credentials while the other would be an experienced-based form of learning. Both should be equally recognized in one framework. The approaches to the two forms of learning are that one can observe performance mostly in a formal educational setting while the individual psychological disposition can only be measured. The author argues that in both cases a linear grading concept does not reflect the reality. Problem solving skills are not easily captured with tests or occasional observations.

So far the German approach towards accrediting degrees has been based on the context taught in an educational program. This can be considered as an input-orientation (Breuer, 2006; Straka, 2004). The description of learning units according to the ECVET-proposal implies an orientation towards performance and acquired competencies. Although the dual system combines school-based and work place learning both learning environments are administered and accredited independently, which hampers the idea of equally recognizing various ways of learning.

Bohlinger (2006) argues that the decontextualized description of competencies might have a reduced informative value about qualifications. The description of results or outcomes without a reference to context, educational program, and educational structures makes it almost impossible to compare qualifications in regard to qualitative aspects. The major challenge in the process of accrediting informal learning will be to find ways how to correctly evaluate the acquired competencies.

Another often expressed concern is that the formation of learning units, which implicates the splitting of a comprehensive constitutive vocational program, would imply that there are demarcated units or modules that can be completed independently. This idea entails that an occupation would be fragmented and the qualification acquired would not comprise the anticipated comprehensive mixture of a wider variety of competencies (Drexel, 2005; Meyer, 2006; Rauner, 2005). In order to avoid this development policies need to be installed that require a certain mix of units for particular occupations. The amount of units that one needs to attend depends directly on the complexity of the task that needs to be accomplished, as well as the necessary routine and maturity, the knowledge, skills, and competencies that are necessary to act professionally (Kommission der Europäischen Gemeinschaften 2008).

## **The German Pilot Study**

The Ministry for Education and Research sponsored in 2008 a concrete measure for the implementation of a credit transfer system. So far it has been difficult in Germany to have former degrees or competencies accredited towards other degrees. Switching between educational branches has also been challenging. With the enhancement of the transparency of qualification pathways as well as the simplification of the accreditation of competencies the attractiveness of vocational pathways could be improved. Side-effects might also be the reduction of waiting periods between educational strands, avoidance of redundant qualifications, and educational „dead ends“. In 10 pilot projects across Germany transferable practices in regard to mobility and permeability are tested. Curricula and exams are currently redesigned in order to focus more on competencies that would be transferable. In 30 month the stakeholders will work on the design of permeable structures on the following four interfaces (Milolaza et al., 2008):

1. between vocational preparation programs and VET programs in the dual system;
2. in-between the dual system or common qualifications in an occupational domain;
3. between dual VET and full-time VET schools; as well as
4. between dual VET and further vocational training.

The task for the participating stakeholders is to split selected vocational programs into learning units while maintaining the principle of occupation, which means while ensuring that the comprehensiveness of the occupational profile would not be hampered. The learning units need to be outlined in terms of their learning outcomes, which includes the description of knowledge, skills, and competencies. In a second step the learning outcomes need to be certified and documented. The amount of whatever has been learned and acquired has to be measured, which requires criteria for the characterization of the dimensions and weighting of learning units. The ECVET system should serve as a quantifier in this regard. Criteria for the attribution of credit points need to be developed. The project is following a bottom-up approach because stakeholders have the opportunity to experiment with different solutions which is a helpful asset under the circumstances of the complicated complexity of the problem.

## **Conclusion**

Arriving at a common solution in a very fragmented educational sphere across Europe is certainly a challenge. Since the policies that frame the development of NQF's according to an overall EQF were released an extensive debate was started in Germany that at least prevented the installation of possibly short sighted solutions. It can be anticipated that the process of arriving at a common sense in the field of VET will take longer than the implementation of the ECTS in higher education. Too complex are the different approaches towards vocational and workplace learning.

An advantage of the ambitious European attempts towards some sort of harmonization is that it brought common German structures into question. The external

pressure to act offers the chance to modify structures in the educational system is today less successful in accommodating the demands of a changing and increasingly globalized labor market. Especially in regard to the permeability of the educational system the Germans have to keep up with international developments and standards. So far, many pathways in Germany are predetermined with little chance to switch between educational institutions as well as between professional careers. There exist no evaluation standards for non-formal and informal acquired competencies. The admission to vocational training has also not been individualized or flexibilized (Frommberger, 2006; Severing, 2006), which might be one reason for the large amount of young adults who are unable to find a placement in the dual system. Although the German VET model has the reputation of producing highly qualified workers it also restricts their flexibility through its occupational framing. Hanf (2005) points out that it is restrictive because it determines the social status of its graduates in the occupational hierarchy and provides little opportunities to change that status.

Nevertheless, it is unquestionable for the Germans that they need to comprehensively modify their VET system and include a German version of modularization and accreditation. Despite the need for reforms the dual system prevails to be a successful way of preparing a competitive and well trained future workforce. Rauner (2008) compares a German VET degree with a currency that is highly valued and respected at the labor market. A German occupational degree will not easily be interchangeable with a bachelor degree from an academic institution.

With the large number of member states in the European Union there seems not much of a chance to maintain one's system completely in the long run. The challenge for the Germans will be to balance out the demand for permeability and quality maintenance. Therefore, an extensive study of the different educational systems and approaches in Europe will be necessary in the near future. In order to arrive at a common European conclusion that is not based on the smallest common denominator extensive collaboration and exchange will be necessary. New ways of acknowledging learning need to be tested and conventional approaches towards categorizing degrees and measuring competencies need to be overcome in order to create room for change.

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## Informal Learning and Emotional Labour in the Hidden Occupation of Home-Based Child Care

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**Abstract:** When parents work or study, most children in Canada receive care in their neighbourhoods. Some home based care is regulated but working conditions create barriers to learning for providers. I explore the working conditions of providers, who frequently learn informally how to provide quality care.

This paper discusses informal learning and emotional labour occurring among regulated child care providers who work in the private domain of their own homes. Informal learning can be discussed with more precision in the regulated child care sector because learning opportunities are frequently documented when they are tied to funding in this sector. This discussion includes reference to my own research with regulated providers in the City of Toronto, Ontario.

The social construction of formalized child care outside of the child's home, in a day care centre or the home of a non-relative is a condition of modern life, as parents in paid employment or in school are typically separated from their domestic environments. When people think about licensed child care, most will envision a child care centre located in a community building or a school space, a storefront or a workplace. In each Canadian province and territory however, there is also a model of licensed child care called family day care or home child care. This is not "nanny" care provided in the child's own home by a person directly employed by parents, but care provided by a woman who is self-employed and who takes children into her own home (Beach, Bertrand & Cleveland, 1998). Research on the model of self-employed caregiving has been extensive in the United States (Kontos, 1992; Raikes, Raikes & Wilcox, 2005) the United Kingdom (Mooney & Statham, 2003) and to a lesser extent in Canada (Cox, 2005; Doherty et al, 2001) and Australia (Baines, Wheelock & Gelder, 2003).

Quality of care for young children in home child care has frequently been contested territory as stakeholders including parents, providers, academics, policy makers and managerial professionals all seek to articulate what constitutes the best version of home child care (i.e. informal models or formally regulated) and what components of care are necessary for the day to day nurturing of children (Bordin et al, 2000; Galinsky et al, 1994). The tension of the "mothering discourse" that associates caring for other people's children with emotion and nurturing has appeared in opposition to the "professionalized" discourse of the early childhood education "expert" model associated with teaching preschool skills and concepts such as letters, numbers and colours (Boisvert, 2001).

Three themes emerge consistently in the debates about quality in home child care: the provider's formal education, regulation imposed by the state and the personal agency or intentionality of the provider.

In one of the earliest influential studies, Fischer and Krause-Eheart (1991) found that the combination of the provider's training, affinity with support networks and her years of formal schooling accounted for 70% of the variance in home child care quality. The combination of the provider's years of schooling along with specific child care training, was more predictive of child care quality than training alone.

In 1999 Canadian researchers Doherty, Lero, Goelman, LaGrange and Tougas (2000) undertook the national You Bet I Care! (YBIC) study of 231 regulated providers in six provinces and one territory. The findings were that variables correlated to quality in home child care included the highest level of formal education attained by the provider, whether the provider had completed formal family child care training and whether she was involved with provider networks. In 2006 Doherty, Forer, Lero, Goelman and LaGrange used the YBIC data set to consider predictors of quality care and found that in addition to the completion of a college level early childhood credential and the use of support services, the strongest predictor of quality was provider intentionality. The indicators of intentionality were described as the provider's positive feelings about children in general, being committed to child care as a career, giving positive advice to friends about the occupation and feeling that she would choose the occupation again, given the choice (YBIC, ¶ 89).

Other Canadian research (Kyle, 1999) identifies that quality in home child care is something that needs to be reproduced every day by individual caregivers. Caring for young children is more than a daily series of discrete tasks. The complex nature of the work of caring for young children requires intentionality but I suggest, it is also related to key themes in the sociology of emotions in care work, which are particularly visible in female-dominated caregiving occupations.

### **Emotional Labour in Carework**

Arlie Russell Hochschild is well-known for originating the phrases emotional labour and emotion work in the context of discussing societal rules and management of feelings that govern our "appropriate" responses, displayed and undisplayed, in the daily social interactions of work and family life. Her early work was influenced by Durkheim, Freud, Marx and most importantly, Erving Goffman. Hochschild's (1983) conception of emotion "work" was described broadly and acknowledged the management of feelings in personal relationships and family life. She extended sociological theories of emotion and the display of emotion to an occupational analysis and subsequently she differentiated paid emotional labour from the unpaid emotion work of managing feelings in general, for example within the family.

Emotion work undertaken for wages then, was defined by Hochschild (1983) as emotional labour that was rarely recognized in a job description at the workplace or as part of a screening process because it was considered naturalized "women's work" to display



certain public responses. As a naturalized component of display behaviour, emotional labour was undervalued in an economic or compensation-based framework. Hochschild further found that for women, there were higher expectations of an emotional investment at work, and that such expectations further reinforced gendered roles at work and at home. This is a key area of consideration when contextualizing the emotional labour of child care providers who base their paid work on their traditional skill-set of unpaid parenting interactions and the tasks of household labour.

### **Informal Learning in Child Carework**

The remainder of this paper discusses my own research conducted in 2006. I explored how the process of informal learning contributes to the quality of care provided by regulated home child care providers (Bird, 2007). Within the quality of care paradigm, I have now come to include emotional labour as an essential learned component of quality as well as an embedded working condition for providers. I follow Hochschild (1979) and suggest that provider learning goes unrecognized and poorly compensated, because it is female-dominated emotion work and because the expectations of positive interactions with children and families are considered “natural” to women in this workplace. Finally, the essential working conditions related to the tasks and to emotional investment of the carework pose barriers to formal education and professional development. For more on challenges to learning for providers see Taylor, Dunster and Pollard (1999).

I explored how five home child care providers have compensated for barriers they face to formal education, by learning informally and on the job. I follow Livingstone (2004) concerning informal learning that goes unrecognized and largely uncompensated. The tension of formal, credentialed education juxtaposed with the praxis of people who are expert at their jobs, yet have little or no credentialing, is a hallmark of the experience of child care providers, who are virtually all women (Goss Gilroy, 1998). In setting up my small study, I enlisted home child care providers who were providing exemplary care, yet had no post-secondary education including specialized education related to young children. In this study, I conceptualized informal learning as contributing to the quality of the work undertaken in one occupational category that has remained hidden in the household: the paid providers of other people’s children. Because this work and its associated “trade knowledge” occurs in the private domains of the providers, it is difficult to document, remaining largely unrecognized and poorly compensated (Doherty et al, 2000; Goss Gilroy, 1998).

### **Working Conditions for Home Child Care Providers in Ontario**

The legislated model of home child care in Ontario is predicated on the assumption of one individual, a woman, providing the care. Providers still generally hold responsibility for the unpaid housework and carework for their own families, regardless of the ages of their children, in addition to the administrative requirements of running a business and getting the “workplace” ready for the next business day. In these respects, the providers

experience the same “double day” of most working mothers but do so in one location where some of the work is not recognized as “work”.

Hours of work are invariably long as (client) families come in and leave at different times of day, typically between 6 a.m. and 6 p.m. There are many reasons parents may choose the home based model of care. In urban areas there are many families who are working unusual or unpredictable hours or commuting long distances, and who cannot fit their workday into the hours a day care centre is open (generally 7 a.m. to 6 p.m.). Examples would be retail, transit, policing, nursing or residential services, 24-hour services such as call centres and now, even grocery stores. A provider’s typical daily activities include managing children’s routines such as meals and naps (perhaps even over-night care), and leading age-appropriate activities for various age groups including infants to 12 year olds. Cooking hot meals and snacks, ensuring health and safety requirements are continuously met, interacting with children, parents and teachers and managing the supervision of children who are also attending school takes organization and planning.

Different aged children affect the demands and physicality of the job. Enrolment of an infant, a three-year old, a kindergarten and two school age children can result in eight trips a day to different schools and bus stops with a double stroller in the heat, wind, rain, ice and snow. Inside the home, the provider’s organization of her space and her private life are deeply affected: Her own children’s belongings may well be stored away or behind closed doors or used as tools of her trade. Her own school aged children may be trying to study or later, attending university. Finally, the administrative requirements of the work in regulated care are increasing with forms to fill out, receipts to file, observational notes to make and program planning every day.

Regulated providers work under increasingly institutionalized conditions that do not reflect the intimate environment of the home based care model. Government officials may cause providers great stress when they visit the home expecting to see a mini day care centre. This is not a job that allows one to do housework while children entertain themselves. Social agencies that manage the system typically state that children cannot normally be left with anyone other than the provider. Often, other family members such as husbands or teenagers pitch in to help but the children are ultimately the responsibility of the one provider. Given the demands on the provider, her personal errands such as medical appointments either include taking along the children or waiting until “after hours” for completion just like other workers outside the home.

Similarly, and importantly for this study, learning needs also wait until after hours when providers might get away from the work environment/family home. However, the very long days of work, combined with looking after their own families mean that learning in formal ways may rarely happen and flexible, informal learning takes on even greater importance.

## **Learning Conditions for Home Child Care Providers in Ontario**

After conducting a focus group, I used a combination of provider-completed time diaries and in-depth interviews to discuss with providers how they accomplished learning informally and on the job, to deliver their high quality of care. They described several features of their experience.

### *Intentional but Academically Unaccredited Learning*

Typically opportunities provided by agencies include community courses, one-of seminars or workshops delivered by a variety of presenters.

### *One to One Training from Credentialed Experts*

Specific experts in the community were frequently mentioned such as credentialed Resource Educators who visit the homes to consult on individual learning plans and adaptations for children with special needs. Other professionals included kindergarten and primary teachers who are highly regarded sources for program information, modeling behaviour management techniques and “off the record” consultations with expertise in communicating with parents.

While home visitors employed by agencies were described as supportive, it seems they are perceived as supervisors, mediators or placement facilitators before they are seen as sources of learning. Although home visitors may sometimes see themselves as mentors, I suggest that their alignment with compliance and inspection roles positions them in a power relationship relative to providers.

### *One to One Experience with Uncredentialed Specialists*

Providers who have had students from the local colleges in the Early Childhood Education program found these young people exciting helpers who taught as well as learned from the providers. Sunday school volunteer teachers taught providers and helped build their communication skills and emotional capacity to work with small groups of children. In each of these examples, the expertise from one person was passed to others in conversation, modeling or through personal loan of resources.

Relationships with peers were consistently identified as more useful than with mentors. The term “trusted colleague” was used by one participant who, with over 20 years of experience did not see herself as requiring a mentor, and was resistant to becoming too close to providers with whom she might compete for enrolment of children.

Importantly, parents were not seen as learning partners in their relationships with providers. In most cases providers described parents as needing their support, not vice-versa .

### *Tacit or Self Directed: Using Observation and Own Efforts and Learning by Doing*

Self directed learning was clearly identified by all providers and included many examples that reflect the WALL and NALL findings, such as using popular magazines,

newspapers, television and radio and using the internet. Other examples included searching for resources independently at dollar stores, local libraries and garage sales. Some providers described and showed home made toys they had copied from expensive examples in classrooms or drop-in programs.

While most of the participants agreed they learn from mistakes, no one wanted to give me an example of having made a mistake.

### **Areas for Future Research**

#### *Provider Demographics and Eldercare Issues*

An unexpected feature of this study was the bird's eye view of providers dealing with their own eldercare issues in addition to providing paid child care for others. This issue has not been uppermost in the minds of researchers because of the assumption that providers are younger women who all have young children at home. In fact, with increasing availability of other employment, career-committed providers are often mature women whose families may not be young. The providers in this study ranged in age from 40 to mid-sixties.

Building on the demographic of a more mature provider, an important area for further research on working conditions, is the management of personal health among the careworkers. Each participant discussed the work in relation to her own health and described ways they stay healthy enough to do the work.

#### *Provider Families as Emotional Labourers*

Families of providers play an integral part in their ability to operationalize an exemplary program. Unpaid family members of all ages assist with the paid work of the provider. Family members are also unpaid emotion workers within their family and the families of the children in care. Long term relationships were identified that developed among children who grow up together and adults and children who stay in touch long after a child departs the child care arrangement.

#### *Occupational Identity*

Providers in this study were all long time participants in the organized system yet positioned themselves across a spectrum from "babysitter" to "professional". Some felt this was a job of work that should be recognized by employee status and others felt it was a calling, not a job at all. The participating providers agreed on important components of entry level education to this occupation. They felt that a grade 12 education is an important minimum because the licensed child care system is increasingly standardized and regulated, requiring increased understanding of text based documents. They said that language and literacy issues among the client families mean parents depend on providers to help children with homework and social skills in English as the dominant language, especially when parents do not have English skills. There was no consensus on post secondary education.

## Looking Forward

I suggest that more data gathering is necessary to establish baseline information about the existing group of regulated providers in Ontario. More research about entry-level and on-going education for future child care providers is required. Further research on models of care that respond to the working conditions of the adults, not only to the quality of experience for children, is recommended. As a first step, there is still much to learn from other jurisdictions in North America, the UK and Australia where similar employment models to Ontario construct the framework for service. Additional research should include comparative examination of employee models of the European Union.

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# **A Bridge Too Far: Filipino Caregivers, Education and the Labour Market in Canada**

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**Abstract:** Migration of Filipino women as caregivers in Canada seemingly ensures participation to better economic opportunities. Due to the rigid process of recognizing foreign credentials, many work in low-skilled occupations after completing the requirements of the Live-in Caregiver Program. The ways in which foreign education is negotiated in the labour market is analyzed.

## **Introduction**

Education is intrinsically linked to the labour market. The attainment of educational qualifications, however, does not necessarily guarantee employment in the desired occupation due to a number of factors. Notable consideration points to the level of economic development and the capacity of states to absorb the new entrants into the labour force.

Avenues of skilled migration necessitate acquisition of a certain level of education that receives corresponding merit in the application process under different immigration regimes. But the measure and value of education varies from one country to another, particularly between developed and developing states like Canada and the Philippines. This paper analyses the intersection of education and migration of Filipino caregivers and the ways in which foreign education is negotiated in the Canadian labour market.

## **Education and Filipino Women**

In the Philippines and elsewhere, education is highly aspired by women and men. Filipino women enjoy higher literacy rates of 94% compared to men with 93.7% before 1995 (Philippine NGO Beijing Score Board [PBSP]). In 2003, functional literacy rates were 86.3% and 81.9 % for women and men, respectively (National Statistics Office [NSO]). At a glance, the free and compulsory education at the primary level and free high school education provided Filipino girls the opportunity to advance to college and universities.

While education appears to be egalitarian, the occupational trajectory of the educated population is gendered. Filipino women predominate in the health and education services with about 75% while underrepresented in engineering and the law professions with less than 20% (PBSP). Correspondingly, the income gap between these occupations favours men. Under dire economic conditions and persistent poverty in the Philippines, about 39% in 2000 (NSO, 200), the pool of educated Filipino women comprises the majority of overseas foreign workers (OFWs) and immigrants in over 160 countries since the 1970s. Many of the female OFWs are at “home” in middle-class households in Hong

Kong, Singapore, Taiwan, Italy, Spain, Saudi Arabia, and Canada, to name a few, working tirelessly as domestic workers and caregivers.

### **Filipino Caregivers and the Canadian Labour Market**

Since the 1980s the Philippines is consistently one of the top ten source countries for foreign domestic workers in Canada. The number of Filipinos granted with temporary work visas every year more than doubled in less than ten years, from 2,010 in 1995 to 5,672 in 2004 (Citizenship Immigration Canada [CIC], 2004). Of this number, majority are women. Filipino women comprise 88% of Filipinos with temporary work visas and 16.5% of the total number of female foreign workers in 2004, making the Philippines the number one source of female foreign workers in Canada (CIC, 2004).

The phenomenal “female labour diaspora” (Parreñas, 2001) from the Philippines to Canada is provided by the Live-in Caregiver Program (LCP). A precursor of the Foreign Domestic Movement program in the 1980s, the LCP is a special immigration program designed in 1992 to augment the labour shortage for live-in care work (Chang, 2000). This temporary migration scheme exacerbated the flow of Filipino women into the unregulated “house-bound” industry where the conditions of work in private homes are outside the purview of the government. Consisting almost 90% of LCP participants (Pratt, 2002), Filipino women now constructs the phenotype of live-in caregivers.

Filipino women are at the centre of the LCP discourse. For about 14 years, this special guest worker scheme has attained a “permanent” stature in immigration policy with no apparent end in sight. Canada appears to rely on the LCP to respond to the needs of middle-class and elite homes in the absence of a national childcare policy and the increasing cost in institutionalized care for the elderly. The \$100 a month per child under 6 subsidy of the Harper government aimed at giving Canadian families a “choice” in childcare options impinges on the LCP as the “better choice” - that is, care in the comfort of their homes, no additional fuel cost and time spent transporting kids to and from the daycare site, and a caregiver available 24/7 in spite of contracted hours of work.

The issue at hand, however, is, what happens to the Filipino caregiver in the labour market after the tenancy of the LCP? Options appear clear in the process of gaining permanent residency status. Not anymore tied to the employment authorization-based visa, the former live-in caregiver now has an “open visa” to venture into the public realm of work. Based on my fieldwork in southern Alberta with thirty Filipino female caregivers in 2007, some of them continue to extend the contract with former employers as the comparable minimum wages to work in restaurants and fastfood outlets are insufficient to cover their cost of living. Majority of them, with established social networks, opt to find work on their own. All of them, nonetheless, desire to pursue their professional qualification as nurses, physiotherapist, midwives, teachers, and accountants. It seems that everything is possible in Canada.

The Canadian labour market operates on the neoclassical assumption of rationality, freedom to exercise economic choices and pursue individual self-interest. Success in this



framework is based on the “efficient and creative use of individual resources” in the market place (Harder, 1992, p. 4). This scenario presupposes a value-free economic environment that enables every individual to have the same economic opportunities regardless of gender, ethnicity, class, and status, among others.

A closer examination of the Canadian labour market reveals many inequities in the access to the prevailing job market, particularly for racialized immigrant women (Epp, Iacovetta & Swyripa, 2004) like Filipino caregivers. Under the effects of economic restructuring in the 1980s, many women in Canada are in precarious employment conditions like part-time work, including their heightened dual roles at home and in paid work (Harder, 1992, pp. 7-13). Also, the occupational segregation of jobs based on sex, the “most important and enduring aspects of labour markets throughout the world” (Clarke, York & Anker, 2003, p. 24), facilitates or constrains equal access to certain gender-typed occupation. It is widely recognized that despite having higher educational qualifications of immigrant women compared to their Canadian-born counterpart they are most often discriminated based on sex and status as immigrants (Fleming, 1981; Zaman, 2006). Immigrant women are generally employed in “women’s jobs” where they are “doubly disadvantaged” on the basis of gender and ethnicity that largely contributes to lesser economic returns (Boyd & Pikkov, 2008, p. 19).

Considering the stratified nature of the labour market in Canada, Filipino caregivers with educational qualifications obtained in the Philippines, like other foreign-trained immigrants (Ng, 1988), must undergo the rigid process and procedure for the recognition of their credentials with regulatory bodies of their profession in the provinces of residence. For example, foreign-trained nurses in Alberta submit their dossier to CARNA, the College & Association of Registered Nurses of Alberta. Based on the feedback from my respondents in southern Alberta, a degree in Nursing in the Philippines is not acceptable by Canadian standards. Primary reason cited is the number of years a degree is completed in the Philippines compared to Canada. To practice as a registered nurse, a Filipino caregiver with a Nursing degree is required to update courses in recognized institutions in Canada at their own expense. To many married women, this is an option impossible to pursue as they save for the eventual reunification with their families. A few unmarried women follow the advice of licensing bodies and take one or two courses alongside working in a combination of odd jobs. Some Filipino caregivers seek other alternative degrees in allied occupations, preferring distance learning modes. Still many others simply dismiss the idea of working in desired professions altogether; content of the fact that Canada is a new country and, as immigrants, they can start anew.

The LCP, despite its flaws, is viewed by Filipino caregivers as another window of opportunity to chart a new life course with their families in Canada. Obviously, the promise of permanent residency and eventual Canadian citizenship attract a continuous flow of Filipino live-in caregivers, majority of which possess professional qualifications. In the process of attaining permanent residency for themselves and their immediate families, Filipino caregivers tend to prioritize income potential rather than building up on their

contribution to the Canadian labour market with their educational qualifications obtained from the Philippines.

While the Canadian labour market system operates under certain liberal democratic principles of equality and freedom, the choices available for Filipino caregivers with foreign credentials to work in occupations they are trained for appear limited. As victims of a “sexist, classist and racist” (Denis, 2006, p. 42) immigration system that deny live-in caregivers as independent immigrants in the first place, Filipino women are systematically pushed at the bottom of the economic ladder and using their educational training seems a bridge too far.

However, there are ways in which foreign education is negotiated by Filipino caregivers. As previously stated, foreign education becomes the starting point to start a different career after live-in carework. It is also the basis from which a comparable degree is pursued in Canada. In addition, their training and educational background allow opportunities to participate in volunteer work, for foreign-trained nurses in hospitals and the Red Cross for example, with the aim of gaining additional experience and expertise with advanced technology as well as obtaining potential work references. One Filipino caregiver trained as a nurse is able to adjust quickly to the demands of her work in a nursing home by familiarizing herself with new models of equipment. Another used her degree in Business to undertake an on-line course in Bookkeeping and subsequently landed a job in an accounting firm. In each step, many Filipino caregivers are able to define ways and means to make their foreign credentials useful to them.

### **Concluding Notes**

Education is central to the eventual successful integration of Filipino caregivers in the labour market in Canada. There is much to be desired, however, since the systematic exclusion of domestic work as a category for independent immigration status in the first place shapes the trajectory of occupations after completing the compulsory live-in work condition set out by LCP.

While the bridge between foreign education qualifications and the labour market in Canada for particular professions appear far enough to many Filipino caregivers, there are many ways in which they are able to negotiate the labour market, either through the formal process of recognition or on their own. A foreign education necessitates some waging of merits with certain regulatory professional associations that often asks too much for Filipino caregivers also working on the financial aspects of family reunification. Many of the Filipino caregivers in southern Alberta find meaningful ways to carve a niche for themselves albeit deskilling takes place. Education, nonetheless, is a tool for social mobility that motivates many Filipino caregivers to find suitable and rewarding ventures in paid and unpaid work as volunteers. It may be that there are unquantifiable factors that allow the differential returns of migration by education work to the advantage of Filipino caregivers in Canada.

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# **Ethnic Minority Women and Lifelong Innovative Learning: Engagement and Opportunities in Hierarchical Organizations**

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**Abstract:** This paper is a critical review of research literature aiming at establishing a conceptual framework for understanding the role of “lifelong innovative learning” for ethnic minority women to manage their career experience in organizations.

## **Introduction**

Despite their proportion of participation in the workforce, ethnic minority women continue to be disproportionately underrepresented in senior positions in organizations in Canada. Most of these women continue to be concentrated in low-paying and low-status occupations regardless of their education and experience and are often excluded from career advancement. The structure and culture of the organization as the foundation for its social and business activities are shaped and expressed by its formal and informal practices, work rules and the social relationships among people working there. The gender and race composition of the organization contributes significantly to the development of its structure and culture; and I argue these structures and cultures are infused with patriarchal and racialized values which ultimately limit participation of ethnic minority women in senior management. Moreover, I suggest that one of the ways that these structures and cultures do this is through their effect on the social networks and availability of social resources necessary for career success. In this context, lifelong innovative learning, based largely on informal types of learning at work, can be instrumental for ethnic minority women to understand and engage with their experience of the various structural and cultural constraints that affect career development. This paper offers a critical review of organizational literature related to the topic in the first half followed by those of the relevant forms of lifelong and informal learning concepts specifically pertinent to the innovative process.

## **Organizational Structure and Culture**

### *Organizational Structure*

An organizational structure is a system of roles and responsibilities with authority distributed in the organization for the purpose of directing its function and changes. Responsibilities are often organized in a chain of command that communications to the top management have to be filtered through different levels in the structure. Some structural variables in organizations, such as the degree of centralization that defines the locus of decision-making authority, can help us identify the sources of organizational power, hierarchy, bureaucracy and authority (Smith and Grenier, 1982). Hierarchical

organizations entrust decision-making authority to more centrally-located positions mostly held by men with power traditionally derived from such positions associated with activities essential to the organizational operation (Kanter, 1977). Demography is an important structural property of organizations (Reskin, et.al., 1999). Research literature on organizational demography indicates that the relative proportions of different groups based on gender and race shape the form and nature of social interactions and group processes which in turn affect the psychological well-being, attitudes and job performance of individuals (Reskin, et.al., 1999). Demographic mix in the workplace affects a member's opportunity to form network ties and obtain useful resources (Lin, 1999). It has significant impacts at different levels in the organization on inter-group interactions, their performance and satisfaction, and power differences among groups (Popielarz, 1999). Women do not normally gain the same degree of centrality as men in these organizations with sources of organizational power to reach the senior level of the hierarchy (Reskin, et. al., 1999).

### *Organizational Culture and the Role of Social Resources*

A cultural perspective on organizations recognizes the symbolic aspects of organized settings linking to the power of organizational symbolism, legends, stories, myths and ceremonies (Smircich, 1983). Culture of organizations can be defined as “a system of knowledge, of standards for perceiving, believing, evaluating and acting” and “a system of socially transmitted behaviour patterns” that serve to relate human communities to their ecological settings (Allaire and Firsirotu, 1984). However, organizational culture can also be seen to involve informal processes of an organization which invariably affect the degree of hierarchy and specialization of tasks. I argue that the work culture in a hierarchical organization is largely created on the basis of gendered power constructed historically and culturally with patriarchal values that influences the gendered, positional distribution of all people in the organization. Such power relations also direct formal and informal work practices and working styles in these organizations.

I suggest here that important for understanding these relationships and process is how they are constructed through durable networks with others, communities and institutions through which social resources are distributed for individuals. This is the “social capital” that also refers to any aspect of the social structure which creates value and facilitates the actions of the individuals within that social network structure. The mutual relationships and aspects of the social network structure are important in facilitating norms and values of the organization, transmitting information among those connected, and creating opportunities for them for economic and cultural growth and development (Bourdieu, 1985).

Recent studies have reported that social capital is directly and positively related to network benefits and career success (Seibert, Kraimer, & Liden, 2001; Sagas & Cunningham, 2004). Network benefits include access to career-related information and resources that are the key factors for promotions outcome and its effect is stronger among

men. These studies demonstrated that promotions were strongly related to the degree of centrality in departmental and men's and dominant-coalition interaction networks. Such research suggests that women and ethnic minorities who do not have equal access to informal interactions and communications and do not occupy critical or high-uncertainty positions within the workflow are excluded from most significant components of successful power acquisition at work.

### **Career Mobility of Ethnic Minority Women**

#### *Constraints and Differences on Career Mobility*

According to Pelled (1996), there are direct and indirect effects on individual's performance in organizations due to conflicts generated through gender and ethnic variables that determine the structure and culture of the organizations. The source of power in organizations comes from the structure with positions that enable people to influence others. People in positions of power are able to use resources available to achieve their goals by implementing rules to determine others' behaviour at work (Kanter, 1977; Salancik and Pfeffer, 1977).

The role of gender as a possible determining factor in the building of social networks with unique and timely access to information and bargaining power, and control over resources and outcomes are important in the process of career development. The nature and strength of the network somewhat define a person's visibility for career opportunities (Seibert, et.al, 2001). Smith and Grenier (1982) indicated that the rise of women to senior positions in organizations has been prevented by the structure mainly because of the sex-role stereotyping that women do not possess the quality for managerial positions. Women who do not have equal opportunities to build vital social resources through networking with others at work have difficulties in pursuing their career goals.

Ethnic minorities share similar experience as that of women in social network development in organizations. The highly-segregated organizational hierarchy supporting patriarchal and traditional values not only undermines female identities in organizations, but also discounts the values and contributions of ethnic minorities with undesirable stereotypes (Reskin, et.al, 1999). Both gender and race were found to be negatively related to career attainment for women and minorities (Hurley and Giannantonio, 1999). Some studies focused on the intersection of race and gender on career outcomes and advancement, particularly on the double disadvantage experienced by ethnic minority women in organizations (Murrell and James, 2001). The imbalance of power often results in inter-group conflicts and the isolation of these women with negative impact on their earnings potentials, career mobility, and access to leadership and decision-making opportunities within organizations (Murrell and James, 2001). The dual pressure heightens these women's job stress, dissatisfaction and interpersonal conflicts, and limits their upward career mobility and career advancement. Highly-qualified ethnic minority women are underemployed and underrepresented in professional and managerial positions (Livingstone and Pollock, 2004).

## Learning and Work

### *Informal Learning*

Formal learning with traditional methods and structure of training and education is necessary but increasingly insufficient to prepare people to cope with the rapid growth and changes in society and the diverse workplace. On-the-job, informal learning is critically seen to be required in day-to-day activities to meet the need for immediacy and is more circumstantial as well as dependent on access to learning resources and support (Coughlan, 2004). The broader function of learning in this sense is to develop capability for meaningful interactions with the total 'lifeworld' in which an individual engages proactively and creatively with the total life experience. I suggest that it emphasizes a situational or a "personal relationship" between the learner and the environment rather than the learner's relationship with an instructor in the conventional sense. However, people's experiences of formal learning will continue to have certain impact on their other forms of learning (Sawchuk, 2003; Hager, 2004).

Informal learning with the whole of society and in the workplace becomes lifelong learning resources for each individual (Hager, 2004). This kind of learning is seen as self-directed and situated with a continuum through the lifetime from the full range of life experience that expands the current organization of self within individuals (Coughlan, 2004). Although it is often considered as residual to formal learning, it has been argued that informal or tacit knowledge is significant and instrumental throughout the life course (Eraut, 2000). As Long (1990) describes, a "learner-managed" learning is an active process in which individuals continually identify opportunities to validate their experience and obtain feedback for evaluation throughout their life time. Positive informal learning opportunities are present when the environment tunes to the needs of an individual in which his or her learning capacity can be further developed (Coughlan, 2004). The activities or interactions involved allow the individual to learn from distinctive experiences and to recognize sporadic opportunities to act and reflect on the action that may either challenge or support existing values and beliefs (Hager, 2004).

### *Learning at Work*

The hierarchical nature of organizations plays a key contextual role in the form and scope of learning that workers are involved in everyday. The experience of learning in organizations is strongly influenced by the resources available and the workflows that limit or expand learning opportunities (Boud and Middleton, 2003; Ashton, 2004). These learning opportunities theoretically include formal study, listening, observing, reflecting, practicing and refining skills, trial and error, coaching, mentoring, problem solving, and giving and receiving feedback. The kind of knowledge required in the workplace relates more to the propositions about skilled behaviour normally defined as the cognitive resource that a person accumulates and is able to apply to a situation for responses and decision making. Informal or tacit learning in the workplace is therefore about the

personal knowledge that is acquired through use of existing knowledge in a new context or in different combinations that helps make work a positive journey (Eraut, 2000; 2004).

### **Lifelong Innovative Learning**

Learning hence characterizes an ongoing process responding to constant demands in decision-making and contingency plans under pressure and limits particularly with reference to the individual's social position in society (Sawchuk, 2003). In this context, the term "lifelong innovative learning" highlights a process drawn and supported by several approaches to informal learning discussed above and below that emphasize a continuing self-directed learning process motivated by the situation and experience of a self-actualizing person who focuses on the activities to analyze, reflect and respond to not only his or her personal experience, but also to integrate other sociocultural aspects relevant to such experience. It also includes the influence of related social environment when such experience and learning take place, responses and experience of other people involved, and the relationship of both. The different sociocultural components refer to a complex mix of dispositions, lived experiences, social relations, values, attitudes and beliefs.

Self-directed learning is one of these approaches which involves a self-plan of each person with goals to acquire desired skills and knowledge for some immediate and definite use or application, particularly in making a decision or solving a problem. The application or anticipated use of knowledge and skills acquired accounts for most of the adult learning arising from social change that affects people's lives (Tough, 1979). Continuous pursuit of knowledge and skills with benefits accumulated for either immediate or future application presents as a lifelong gain for a self-directed learner (Brockett and Hiemstra, 1991).

Processes of self-directed learning therefore involve reflection. Reflective learning is another approach that describes how reflection uncovers the meaning and feelings of the learner's own experience in different contexts as a basis for knowledge creation and personal meaning-making (Schön, 1983). Only learners themselves can learn from and reflect on their own experience. The reflection is pursued with an intent or need directed towards a goal arising out of the normal occurrences of one's life, such as from discontent with one's current situation or unexpected success with impossible tasks. The reflective process involves complex interrelated and interactive feelings as well as cognition of the learner. Learning is resulted with actions from the reflection of lived experience.

Lifelong innovative learning however is also shaped by the surrounding environment. Different from self-directed and reflective learning, sociocultural learning claims that personal experience can only be created from activities among the entire spectrum of social participants. Learners construct their own experience in the context of a particular social setting and range of cultural values (Boud, Cohen and Walker, 1993). It is argued that learning is a reflection of the social and economic order that people organize in which they hierarchically participate. People learn to operate in their institutional life under the multi-dimensions of their culture, history, politics and economy that are rooted in their social hierarchy. The significance and influence of the social context relating to each



of our experiences must not be minimized and it was argued that adult informal learning in the workplace is shaped by forms of social difference including those related to social class (Boud, Cohen and Walker, 1993; Sawchuk, 2003). The lifelong innovative learning process thus involves experimentation, risk-taking and variance-seeking through a creative psychological and social process of the individual (McGrath, 2001; Fenwick, 2003). This process involves continuous negotiations between the individual's desires and intentions and his or her changing social environment in choosing the key elements meaningful in his or her response to situations or decision making. The key elements include personal resources available, such as those from the family, friends and community, and, in particular, personal experience of the individual.

### **Conclusion: Lifelong Innovative Learning and Ethnic Minority Women**

Ethnic minority women challenged by structural and cultural constraints in hierarchical organizations on their career will benefit from engaging in unique learning practices involving a complex mix of dispositions, lived experiences, social relations, values, attitudes, beliefs and their respective life history. The lifelong innovative learning process seeks to focus our consideration of new and tacit knowledge for these women to manage change and develop their career in a direction that addresses the psychological, emotional and social/cultural components involved. It results in personal growth using multiple strategies within conditions of inequity, organizational barriers and crisis management. It is suggested here that the conceptual frame-work, developed from the critical review of literature offered above, may produce outcomes that influence the vision, attitude and career goals of ethnic minority women in overcoming obstacles and improving their job opportunities and performance. This also presents the brief argument that being or becoming proactive, lifelong, innovative learners helps ethno-racially and gender marginalized people gain new knowledge and improve their career mobility with personal enrichment.

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# Contradictory Trends? Labour Shortages and Rising Precariousness in Alberta's 'Booming' Economy

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**Abstract:** This paper will explore precarious employment in Alberta, focusing on the gendered and racialised dimensions of employment trends, policy shifts surrounding the Temporary Foreign Worker Program and their impact on labour market insecurity.

## Introduction

It is now common knowledge that there has been a steady decline in standard employment and a parallel rise in precarious employment in Canada over the last several decades. However, less is known about employment trends and the nature of labour market insecurity in Alberta. With reference to current national and international debates on the implications of economic and policy developments on employment shifts, the paper examines the nature of labour market insecurity in Alberta and explores the relationship between hiring practices, labour and social policies, and rising precariousness in the province. It will demonstrate that national employment trends have generally been replicated in Alberta. Despite the province's strong economic performance in recent years and the labour shortage in the province, precarious employment has generally grown. The rapid expansion and growth of the Temporary Foreign Worker Program has contributed to this growth and has shaped employment trends in the province. The paper will conclude by discussing policy responses and options to these developments.

## Precarious Employment: Key Issues and National Trends

Precarious employment is characterised by work that is insecure, unstable, low paying, and poorly protected by labour legislation, collective bargaining and social policies (Fudge & Vosko, 2001; Vosko, 2000). It includes temporary, casual, contract, seasonal, and part-time work, as well as own account self-employment and multiple job holding. The term precarious employment is often used interchangeably with words such as contingent, non-standard and atypical employment, and is examined in opposition to what is commonly called 'standard employment', defined as permanent employment with an employer, working full-time, year round on the employer's premises under his or her supervision, and entitled to statutory benefits and protections (see, for example, Cranford, Vosko, & Zukewich, 2003; Schellenberg & Clark, 1996).

There has been a steady decline in standard employment and a parallel rise in precarious employment in Canada over the last several decades. For instance, the proportion of the working population with full-time permanent jobs fell from 67% in 1989 to 63% in 2002 (Cranford et al., 2003:11). According to Statistics Canada figures, about

13% of Canadian workers - or 1.7 million- are temporary. Of all new hires in the private sector in 2004, 21% had a temporary job in comparison to 11% in 1989 (Statistics Canada, 2005). Employment changes have a strong gender and racial component. Men are more likely to have full-time, permanent jobs (66% versus 59% in 2002), while women constitute the majority of part-time workers in both employment and own-account self-employment (Cranford et al., 2003). Immigrants and visible minority workers are more likely to work in precarious employment, and to be poorly protected by social policies and employment standards. For instance, white men in precarious employment are almost twice as likely as white women and also twice as likely as visible minority workers of both genders to have access to extended health coverage (Cranford, as cited in de Wolff 2007: 11).

Workers in precarious employment often earn low incomes, and many are among the country's working poor because they work fewer hours than standard workers and have lower hourly earnings (Kapsalis & Tourigny, 2004). For example, workers who are solo self-employed (e.g. do not have employees) are five times as likely as full-time workers to be in households whose income is less than Statistics Canada's Low Income Cut-off. Temporary part-time, temporary full-time and permanent part-time workers are approximately three times as likely to live in very poor households than full-time workers (de Wolff 2007: 7).

Research also demonstrates that precarious employment is harmful workers and their families (see, for example, Malenfant, 2007; Quinlan, Mayhew, & Bohle, 2001; Virtanen et al., 2005). Workers in precarious employment tend to experience high levels of stress linked to employment insecurity and uncertainty, often resulting in poor physical and mental health and greater risk of work-related injuries.

### *Precarious Employment in Alberta*

National trends in employment shifts have generally been replicated in Alberta. Despite the province's strong economic performance and labour shortage in recent years, precarious employment has steadily grown over the last few decades. If all indicators of precariousness are considered - adequacy of wages, job security, regulatory protection, benefits and union coverage - it is clear that a large and growing percent of Alberta's workforce is in precarious employment. For instance, in 2000, only 68% of the Alberta labour force (and 60% of the female workforce) was in full-time, permanent employment. Low levels of unionisation, weak labour and employment protection from both the Employment Standards and Labour Relations Code, and low wages reveal high levels of precariousness even amongst many in full-time, permanent employment.

Some key indicators of this include (unless otherwise noted, statistics in this section are based on Statistics Canada data I've accessed using the Gender and Work Database):

- Part-time employment remains high, just below the national average, while full-time employment rates are almost equal to the national average. New data from Statistics Canada's 2006 census shows that about 18% of the national labour force was employed in part-time (including both permanent and temporary)

employment. Alberta's provincial rate of part-time employment was almost the same (17%). The Canadian Labour Congress estimates that part-time employment has risen since 2006, forming close to 9 out of 10 new jobs (CLC, December 2006).

- By 2000 the national rate of full-time, permanent employment had dropped to approximately 69% of all paid workers, and Alberta's rate had dropped to 68%.
- Women in Alberta were hit particularly hard by employment shifts: nationally, approximately 62% of the female labour force was in permanent, full-time employment in 2000 while the percentage of women in full-time, permanent employment in Alberta was only 60%. In other words, 40% of women in the Alberta labour force in 2000 were in some type of precarious employment arrangement.
- Immigrant and visible minority workers were slightly less likely to work in full-time, permanent employment in Alberta. In contrast to the national average (71%), only 66% of visible minority workers in Alberta were in full-time, permanent employment, and 17% were in part-time, permanent employment.
- Women are concentrated in temporary employment in Alberta, especially in 'casual employment', one of the least protected forms of temporary work.
- Alberta's wage rates have generally been below national averages, especially for those in precarious employment.
- Employment benefits and supports are lower in Alberta than the national average, and lower than many other provinces. For instance, in 2000 the national average for pension coverage full-time, permanent employees (both male and female) is 55%, in contrast to only about 40% of full-time, permanent employees in Alberta. The national average for temporary workers was 18% in comparison to only 14% in Alberta.
- Low levels of unionisation: Alberta has consistently had the lowest levels of unionisation in Canada. For instance, in 2006, the national rate was 32%, Manitoba's was 37%, Saskatchewan was 37% while Alberta's was only 24%.
- Alberta's Employment Standards legislation (Employment Standards Code) and Labour Relations Code are both weak (weaker than many other provinces). For example:
  - In June 2005, the Alberta government changed the Employment Standards rules to allow restaurants to hire 12-14 year olds.
  - Section 2(3) and 2(4) exempt agricultural workers from most provisions of the Code, including minimum wage, overtime, hours of work, statutory holidays, vacation and employment of children.
  - Exemptions in the Labour Relations Code and Occupational Health and Safety Act mean that farm workers in Alberta can't refuse unsafe work, can't get Workers Compensation when they are hurt, and can't join a union.
  - Domestic workers are exempt from Employment Standards coverage regarding maximum hours of work, notice of work and overtime.
  - Other eligibility requirements limit employment standards coverage for precarious workers.

### *Temporary Foreign Workers in Alberta*

The increased use of temporary foreign workers in Alberta has contributed to rising precariousness in the province. A range of socio-economic changes in Canada and key developments in the program have impacted the overall role of the Temporary Foreign Worker Program (TFW Program) and the type of workers recruited into the program. Four significant and related developments can be noted: (1) a significant and rapid growth in the number of temporary foreign workers living in Canada; (2) the decline in the number and ratio of professionals entering the country as temporary workers; (3) the rise in the number of ratio of semi-skilled and unskilled workers (occupation levels C and D); and (4) the introduction of the Low-Skilled Workers Pilot Project in 2002.

In terms of overall growth, government statistics reveal that there were 171,844 temporary foreign workers living in Canada in 2006, which represents a 122-per-cent increase over 10 years (Government of Canada 2008). This growth has been particularly significant in Alberta, where there was a 400-per-cent increase in demand for foreign workers between May 2006 and May 2007 (Government of Canada 2008). According to government statistics, in 2006 there were 22,393 temporary foreign workers working in Alberta. This is more than double the 11,067 temporary workers who were in the province in 2003 and more than three times the 7,286 who were in the province in 1997. Service Canada reported that more than 37,500 jobs for foreign workers were approved in 2007 for Alberta employers, up from 17,200 in 2006. With this rise in temporary workers, by 2006 Alberta had the third highest percentage (13.5%) of temporary foreign workers in the country, after Ontario (44.7%), BC (21.8%).

Changes have also taken place with reference to gender and occupational level. In general there is a larger percentage of men entering the province as temporary foreign workers, and this number is increasing more rapidly than that of women. For instance, in 2002 men made up 64% of TFWs coming to Alberta and by 2006 this number had increased to 67%. The more rapid increase of male TFWs is likely linked to the increase use of TFW in construction and oil industries.

Second, as Table One shows that there has also been a steady growth in the number of semi-skilled and so-called unskilled workers. In 2002 these workers (those in skill levels C and D) made up only 16% of the TFWs entering Alberta to work. By 2006 this number had almost doubled, to 29%. Correspondingly, while the number of workers in the managerial and professional categories have also increased, their growth has been outstripped by lower skilled workers. As the table shows, in 2002 managers and professional workers made up 34% of the annual flow of TFWs to Alberta, but by 2006 this had dropped to only 24%.

Provincial trends in TFWs mirror national developments. Based on data from Citizenship and Immigration Canada, 58% of temporary foreign workers in 1996 were in the managerial, professional and skilled occupations in comparison to 28% in semi-skilled and unskilled occupations. By 2005 the percentage of workers in the managerial,

professional and skilled occupations had dropped to 43% while those in semi-skilled and unskilled occupations had risen to 38% (Citizenship and Immigration Canada 2005).

*Table One: Annual Flow of TFWs by Occupational Skill Level into Alberta*

	2002	2003	2004	2005	2006
Skill level O: managerial	220	219	264	331	548
Skill level A: professionals	2,574	2,001	2,182	2,568	3,139
Skill Level B: skilled and technical	1,213	1,172	1,228	1,726	3,231
Skill Level C: intermediate and clerical	1,163	1,222	1,440	1,879	2,830
Skill Level D: elemental and labourers	183	207	254	451	1,518
Skill not stated	2,899	2,889	3,253	3,462	3,906
<b>TOTAL</b>	<b>8,252</b>	<b>7,710</b>	<b>8,621</b>	<b>10,417</b>	<b>15,172</b>

Data: supplied by Immigration Economist, Policy and Planning Alberta Employment and Immigration

Finally, it can be argued that a key problem with the TFW Program is that it is shaping poverty and precariousness at a national, provincial and local level. In general, recent changes have made it much easier for employers to access workers from abroad and harder to regulate what happens to workers once they arrive. The TFW Program is a short-term strategy that only deals with the *consequences* of labour market problems that have resulted in labour shortages, rather than the *root causes* of these problems. Indeed, changes in the program and its rapid expansion serve to reinforce and shape precariousness in the province. Consequently, both national and foreign workers are negatively impacted by employment characterised by high levels of insecurity, vulnerability and instability. In short, the Alberta labour market continues to be characterised by contradictory trends: ongoing labour shortages, especially in some occupations and sectors, alongside high and rising levels of precariousness.

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# Explaining the Specific Education-Job Gap Experienced by Chinese Immigrant Workers in Canada<sup>1</sup>

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**Abstract:** This paper argues that Neo-Weberian social closure theory and Marxist class analyses used to explain the specific education-job gap experienced by Chinese immigrant workers needs to be complemented by a historical approach accessed by critical discourse analysis.

## Introduction

As early as a decade ago, Dr. David Livingstone in his classic text: *The Education-Jobs Gap: Underemployment or Economic Democracy* (1998) which won him the CSAA John Porter Memorial Book Award, systemically addressed the education-job gap in western capitalist economy. He identifies and defines it as “the growing gap between the unprecedented extent of collective knowledge of the people and the diminishing number of meaningful, sustaining jobs” (p. 1). The basic thesis of this book as he claims is that: “Most of us continually learn much more work-related knowledge than we ever have a chance to apply in paid workplaces” (p. 10). Based on a comprehensive overview of empirical studies on this topic, he specifically conceptualizes this underemployment in terms of six aspects: “the talent use gap, structural unemployment, involuntary reduced employment, the credential gap, the performance gap and subjective underemployment” (p. 6). This paper will extend his analysis of the credential gap with a specific focus on Chinese immigrants in the Canadian labour market. Drawing on the Marxist class-based analysis of social relations, Neo-Weberian social closure theory (Collins, 1979; Murphy, 1988) and critical discourse analysis (Fairclough, 1992), the paper aims to explain that the present disadvantaged position of Chinese immigrants workers in the Canadian labour market are historically, materially and discursively constructed.

## Credential Gap and the Devaluation of Foreign Credentials

According to Livingstone (1998), the credential gap refers to the fact that the educational entry requirements were increased by some employers beyond the levels of knowledge actually needed to perform them. “Canadian survey suggests that around 20 percent of the entire employed workforce and larger proportions of younger, more highly educated workers are ‘overqualified’ or underemployed in this sense of having a higher credential than their job requires for entry...” (p. 75). The strength of Livingstone’s thesis lies in the fact that he confirms his theoretical predictions about class-specific differences

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in the extent of underemployment on each of the six dimensions of the education-jobs gap through using empirical data from the OISE Survey of Educational Issues. “This class analysis indicates that most objective dimensions of underemployment are lowest among corporate owners and professional-managerial employees, and most prevalent among the working class...” (p. 223) “But visible minorities in all class positions are more likely to have excess credentials than those from other ethnic backgrounds, which confirms the persistence of race-related barriers to job entry” (p. 215).

Although Livingstone doesn’t specifically go further to compare the extent of underemployments between white Canadians and visible minorities in terms of their class positions, this underemployment in relation to the non-recognition or devaluation of foreign credentials of visible minorities has been well-documented elsewhere in academic literature. Basran & Zong (1998) found that many foreign trained visible minority professionals experienced downward social mobility after immigrating to Canada and institutional barriers such as nonrecognition or devaluation of credentials were identified as the major cause. Li (2003) further analyzes the market worth of immigrants’ educational credentials based on the 1996 census data, revealing that when individual variations, gender and racial origin are controlled, immigrants’ credentials substantially and adversely affect their net earning. In other words, one of the structural barriers that contribute to the less earnings of immigrants than that of their Canadian counterparts lies in the fact that a lower market value is given to their educational credentials. Besides the income disparity another direct effect of this devaluation is that many immigrants shift from prior professional and managerial jobs to “occupations in sales, services, processing, and manufacturing” and the data from the Longitude Survey of Immigrants to Canada reveals that among those 12, 000 newly arrived immigrants between 2000-2001 who find jobs, 60 per cent didn’t work in the same areas as those before immigration (Guo & Anderson, 2005, p. 13). Bauder (2003) reported the same problem: “many highly skilled immigrants assume secondary work far below their qualifications” (p. 708). So the question that arises here is how should we explain this specific education-job gap in terms of over qualification or underemployment caused by devaluation of credentials experienced by immigrants in Canadian market? More specifically, to what extent the analysis provided by Livingstone in addressing the general education-job gap is also applicable to the labour market experiences of immigrants?

### **Social Closure Theory and Class Analysis**

In explaining the education-job gap, Livingstone (1998) criticizes the “education as economic salvation’ argument”, that is “making the education system and workforce more responsive to the presumed high skill needs of a global “post-industrial or knowledge economy”(p. 6). He argues that “these notions do not accord with workplace realities” (p. 174). And the human capital theory that is based on the correspondence of higher level of earnings with more schooling only mislead more individual job seekers to pursue further education to enhance their competitive chances of actually finding a job. In the case of

immigrants in the Canadian labour market, Li (2003) also argues that the neoclassical economic model of human capital cannot explain the actual income disparity between immigrants and native-born Canadians as it ignores the structured inequality based on gender, race and nativity. The above arguments reveal a similar experience of both individual job seekers in general and the immigrants in particular, that is the credential itself won't do. To explain the underemployment experienced by both sides, we need to situate this social problem within a broader analysis of Canadian capitalist economy. In this sense, Livingstone proposes a class-based conflict theory in his explanation of education-job gap through a critical overview of the contemporary Marxist and Weberian theories of education-work relations. Based on his analysis, I argue that some of these insights are also applicable in explaining the labour markets experiences of immigrants. Two points are highlighted here.

First, educational credentials are an important exclusion form in contemporary capitalist society. This credential gap, for Livingstone can be partly explained by Collin's concept of "credential inflation", that is occupational groups use credentials "which are often far beyond the production requirements of their work, to construct and maintain positions for themselves in the labour markets" (1998, p. 178). In other word, this gap is the consequence of status group competition and educational credentials are less related to the skill requirements of actual jobs but more worked as formal cultural currency to occupational power. Collins's social-closure theory was criticized and extended by Murphy. As he argues "...it would be a mistake to premise closure theory on the assumptions that credentials are an exclusionary code equal in importance to property in capitalist society or to the Communist Party in state-socialist society. Credentials are better conceived as derivative and contingent forms of exclusion than as a principle form" (1988, p. 182). For Murphy, Collin's social closure theory is characteristic of "voluntarism and methodological individualism of much neo-Weberian theory" through overemphasizing the power of credentials while ignoring "deep structure of closure" (Morrow & Torres, 1995, p. 205). In this sense, to complement the weakness of status competition theory, Livingstone appropriately brings Marxist class struggle theory into explaining the contemporary education-job gap.

Second, Marxist insights into capitalist production dynamics are still relevant in explaining the underemployment of immigrant workers in capitalist labour market. Livingstone (1998) highlighted three contradictory relationships in the capitalist mode of production identified by Marx: inter-firm competition; class struggle between capital and labour; and revolutionary forces of production. And he argues that "current tendencies in global capitalist production continues to be explicable through these contradictory relationships" (p. 185). More specifically,

Inter-capitalist competition is constantly destroying firms, forcing enterprise restructuring and provoking movement of capital from one town, sector or technology to the next...at the same time, the revolutionizing of productive forces

continually alter jobs and division of labours and technical skill requisites...”  
(Livingstone, 1998, p.185).

All these changes in the capitalist labour market revolves around capitalists’ objective to ensure the profits and “the primary consequence for labor is the continual insecurity of employment” (p. 186). This underlying logic of capitalist production dynamics “have prevailed in Western societies for roughly two centuries” (p. 184) and continue to be so in the current capitalist society.

The above two insights in explaining the social problem of underemployment of immigrants workers in contemporary capitalist labour market is of essential importance for us. On the one hand, it reveals the non-recognition or devaluation of immigrant credentials is an important way of preventing them from accessing occupational power therefore effectively placing them in a disadvantaged position in status competition and power hierarchy. On the other hand, their underemployment should not be understood in isolation from the contradictory relationship of capitalist mode of production and the nature of capitalist society that strives for profits. However, such theorization that conflates the underemployment of immigrants with those white Canadian labourers is not adequate to explain immigrants’ more disadvantaged positions and accordingly the inequality they experienced in the capitalist labour market. To account for the specific education-job gap in terms of devaluation of immigrant credentials requires recourse to theories that give greater continuing importance to history of immigration and the discursive practices of discourses based on race. On this point, I argue that Livingstone’s Neo-Weberian social closure theory and Marxist class-based analysis of social relations need to be complemented by a historical approach that draws on critical discourse analysis that allows for recognition of racialized differences encountered by Chinese immigrant workers.

### **Using a Critical Discourse Analysis Approach to Examine Racialized Historical Discourses**

Critical discourse analysis is concerned with analyzing how social and political inequalities as well as power relations are embedded and maintained in discourse, produced, reproduced and transformed through it within specific social structures (Wooffitt, 2005). More specifically, I use critical discourse analysis to examine how social identities, social relationships and knowledge and beliefs are intertextually and discursively embedded and constructed in various genres of discourses. Drawing on Kristeva’s concept of intertextuality which implies “the insertion of history (society) into a text and of this text into history”, Fairclough sees texts as being “full of snatches of other texts, which may be explicitly demarcated or merged in, and which the text may assimilate, contradict, ironically echo, and so forth” (1992, p.84). This being said I use this approach to examine how historical and present-day texts have constructed Chinese immigrant workers. It allows us to recognize Chinese immigrant workers experience of the education-

job gap is different from white Canadians because of their complex racialized location in Canadian society.

Historically, Chinese immigrant workers were regarded as “Heathen Chinese”, uncivilized, unassimilable and inferior to the white Canadians. During the middle of the nineteenth century, labour shortage in railway construction was one of the pull factors that attracted and sustained large-scale Chinese workers to Canada, many of whom were indentured labourers brought by European ships with the assistance of Chinese compradors in the coolie trade. In fact, after the abolition of the slave trade in the mid-nineteenth century, the mass migration of Asian labors began to replace slave labor as a major work force for the colonial economy (Held, et. al. 1999). “Chinese migrants were seen as cheap and exploitable workhorses for the most hazardous sections of the railway.” (Fleras & Elliott, 2007, p. 240). They “...were employed for \$1 a day (only 80 cents if they did not buy provisions from the company store), compared to \$2 a day for Canadian workers” (p. 241). John. A. Macdonald in the 1885 Royal Commission Report once said, The Chinese are foreigners...he has no interest with us, and while he gives us his labor, and is paid for it, and is valuable, the same as a threshing machine or any other agricultural implement which we may borrow from the United States on hire and return it to the owner on the south side of the line... (Li, 1988)

As Li (1988) maintains, anti-Orientalism has been strong before the enactment of the Chinese Head Tax in 1885. In the 1885 Royal Commission report on Chinese immigrants, Surveyor General Pearse said, “We want here, a white man’s community, with civilized habits and religious aspirations, and not a community of ‘Heathen Chinees’...” (as cited by Anderson, 1991, p.54). Fleras & Elliott (2007) argue that, “from the time of their arrival in Canada, Chinese immigrants were subjected to legislation that sought to destroy the community, restrict political activity and inhibit healthy social growth” (p. 241). Various exclusionary mechanisms were directed towards Chinese who remained in Canada. They were “excluded from holding hand-loggers’ licenses, prevented from settling on Crown land, barred from the professions of law or pharmacy, and banned from hiring white women to work in Prairie restaurants or laundries” (p. 241). When the Canadian Pacific Railway was completed in 1885 the federal government moved immediately to restrict the Chinese immigration to Canada by imposing a head tax of \$50 on all Chinese origins, “naturalized or not” (Statutes of B.C.1920, as cited by Li, 1988). In 1903 the head tax was hiked to \$500. When Canadian federal government found that the tax was not effective in keeping the Chinese out of Canada, it passed the Chinese Immigration Act in 1923, which excluded all Chinese from entering Canada. Chinese became the only ethnic group that was specifically prohibited from entering Canada. This act was not repealed until 1947.

By locating Chinese migrant labourers at the bottom of hierarchies of the workplace, this kind of racism is far more than simply distain based on their skin color or cultural patterns; rather, as Baliba& Wallerstein (2002) argue “Distain and fear are quite secondary to what defines the practice of racism in the capitalist world-economy”. Here, racism plays an important role in recruiting this part of labour-power for the purpose of maximizing the

accumulation of capital, at same time, minimizing cost of the labour power by paying them half wage and minimizing the cost of political disruption (the protest of white labour force) by maintaining the differential pay. By arguing this, I do not intend to reduce race to class by claiming that the “functional” need of capitalist class for a reserve army of labour is the only reason that explains the emergence and persistence of unequal treatment. What I am trying to emphasize here is the interaction of race and class rather than viewing them as separate terrains of struggle; how class relations are created along race line.

This part of history has passed and the overt Canadian immigration policy based on race and nationality has been replaced by point system which emphasizes immigrants’ education background and skills in 1967. However what has continued from the past history is the racial discrimination discourses in viewing Chinese immigrant workers who came to Canada in the twenty and twenty-first century to fill the labour shortage in the Canadian economic market. The recent discourses in discussing the credentials of immigrants are the best manifestations of this historical continuity.

Contemporarily, such discourses were discursively reconstructed in discussing the immigrant professionals. “There is no guarantee that foreign-trained professionals possess the skills, background and approach deemed essential by practitioners in Canada. Standards remain a concern” (Adams, 2007, p.16). In this sense, skills and experiences of the “internationally trained professionals” are portrayed as suspicious and inferior and not up to Canadian standard, therefore they are supposed to go through a retraining process. The devaluation or non-recognition of foreign credentials discourses and the Us/Them dichotomy discourses justify racism against the other, construct the Chinese immigrants’ identity as deficit, unqualified, and maintain the unequal power relations in labour market. At the same time, such discourses are intertextually reconstructed by the media, politicians, employers and the stereotyped beliefs against Chinese immigrants become a common sense unchallenged by most people.

### **Conclusion**

The credential gap that Chinese immigrants and white Canadians experienced are theoretically and empirically different in that the immigrants credentials are often not fully recognized as equal to those of the latter. The presumed differences result in the fact that they do not share the same life chances in the labour market. To explain this, Neo-Weberian social closure theory and Marxist class-based analysis of social relations as espoused by Livingstone needs to be complemented by a historical approach as teased out through a critical discourse analysis approach.

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# Learning and the Older Professional: Patterns and Problems

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**Abstract:** This paper explores the work-related learning of individual professionals categorized as ‘older’ by the literature: 50-plus. Findings from empirical research highlighted contradictory discourses around ageism, professionalism, and informal learning.

## Overview

The paper presents empirical research exploring learning practices of professionals categorized as ‘older’ by the literature: 50-plus. Our study was prompted by a growing policy emphasis in Canada on the imagined problem of the ‘older worker’, which is typically framed uncritically as a dual concern around retention of older workers: how to combat ageism in the workplace, and how to retrain older workers. Our funded study conducted interviews and a questionnaire to explore the question: What are the unique approaches and challenges experienced by older professionals in work-related learning? The study focused on certified management accountants in western Canada, who are required to continually ‘update’ their education, who increasingly tend to work past the age of 65, and who, incidentally, engage in a wide range of learning practices. Findings highlight contradictory discourses around ageism, professionalism, and expectations that affect older professionals’ enactment of identities and knowledge in different ways. Implications for adult educators focus on understanding these challenges experienced by older professionals, as well as critically questioning existing assumptions about workplace learning, informal learning, and inter-professional collaboration.

## The Problem of the ‘Older Worker’ As Learner

The ‘older worker’ category has appeared in recent policy documents in the UK, Europe and North America with varying age-dependent definitions, usually 50+ years (Europe – EQUAL 2007) or 55+ (Canada – HRSDC, 2000). Older workers’ job satisfaction and retention in the paid labour force has become a policy priority because of two main projections: the projected shortfall in the availability of skilled labour now and in Canada’s future, and the ‘greying population’ such that 30% of the North American population will be over 55 years by 2025 (HRSDC, 2004). Changes to regulations around mandatory retirement are also expected to wreak changes in workplace demographics, although these effects are not yet clear. In fact, in fall 2006 HRSDC announced a major Targeted Initiative for Older Workers to help retain or re-integrate older workers into the workforce through training and other supports.

This is the economic logic, that learning is important for retaining and improving the productivity of older workers as human resources. For us, however, understanding older workers' learning is important because this category has become mobilized in a new generational politics being represented in workplaces. Age references have until recently virtually disappeared from discussions of social relations at work. With this growing policy and research focus, the 'older worker' has become singled out for recognition, then constructed as a particular subjectivity in isolation from the generational dynamics of the workplace. Other age categories are not typically considered in these policy discussions alongside the so-called seniors, nor are the relations within and among these categories addressed. The problem then is that markers of 'older worker' are particularly prone to stereotype and essentialism. There is a lack of discussion about what constitutes 'age' in terms most relevant to the workplace. Is it purely biological and chronological? Health-related? Determined through generational experience, as when human resource developers talk about the 'boomers', the 'traditionalists', and the 'millennials'? Or is age a code for occupational experience and career stage? For instance, workers who switch careers or join a profession in mid-life – such as many professors of adult education – can find themselves referred to as 'young people' at the age of 45.

Problematically in this whole construction, the older worker becomes an odd floating category among communities of workers that for the most part are considered in ageless terms. The emergence of the category and the work that continues to maintain its boundaries becomes submerged in the press to trace its causal trajectories. Onto such a category can be projected all kinds of effects and issues that frame problems unhinged from the cultural-historical dynamics of the workplace. For these reasons, any study of older workers must be particularly careful to consider the web of relations and the multiple dynamics and constructions of age as only one social characteristic functioning within this web. The category itself must continue to be problematized and re-located within other age categories. And of course, inasmuch as social characteristics function in social networks of power to produce inequity, age must be considered in conjunction with gender, race, sexuality, dis/ability and other dynamics of identity and social location.

Notwithstanding these considerations, the existing literature on older workers has characterized their learning and knowledge as particularly important in the knowledge economy discourse, where emphasis has been placed on fast-changing technological and innovative learning, as well as entrepreneurship and resilience (OECD, 1996). Older workers reportedly face devaluing of their knowledge, age discrimination in a youth-focused workplace, physical difficulties, and consequent exclusion from learning opportunities, as evidenced in the literature (Betcherman, Leckie and McMullin, 1997; Morrison, 1996; Tindale, 1991). Age-related discrimination has generated misunderstandings, negative stereotypes and ultimately, devaluing of aging workers by colleagues and employers, constructing them as 'problems' taking up jobs and resources (Ainsworth, 2006; Carroll, 2007). While age is reportedly more acceptable in some professions such as law than in others such as the high tech industry, Ainsworth (2006)

shows that in general the traits of reliability, personal maturity, stability and punctuality assumed to characterize older workers are not valued as much as the mercurial, flexible dynamism that is assumed in younger workers. In our own media we see images urging aging workers to re-construct themselves to fit the norms of youth. This effectively forces older workers into a particular kind of learning that undermines their own identities, work history and knowledge.

### **CMA Profession and Learning**

We chose to focus on professional certified management accountants (CMAs) because this group is characterized by a particularly large proportion of older individuals, who often continue working well past 65 years (e.g. as private contractors), and whose work is embedded in fast-changing regulations, workplace structures and technologies that are supposed to necessitate continual learning. As is the case with other professions, accountants are challenged by intensified work, increasing demands for specialization, new emphasis on entrepreneurial flexibility, and increased performance regulation. Growing public demand for scrutiny of accounting practices and the general rise of an audit culture likely contribute to CMA associations' recent requirement that accountants demonstrate their competency and ongoing professional development annually.

Indeed, continuous learning has become a key emphasis for professional associations serving CMAs in Canada. Members must retain a log and evidential documentation of these activities, and submit to the association an 'annual declaration' indicating compliance with the policy along with their annual membership fee. The Association may 'audit' a member at any time to check the logs of specific activity participation. In choosing activities that the Association deems relevant to professional learning, CMAs are encouraged to use the CMA Competency Map as a guide. This map presents six 'functional' competencies for the professional CMA (strategic management, risk management and governance, performance management, performance measurement, financial resource management, and financial reporting) and four 'enabling' competencies (problem solving and decision making, leadership and group dynamics, professionalism and ethical behavior, and communication). These competencies are treated as essential and universal regardless of a professional's experience or context of practice. Amidst all of these dynamics, discourses of 'trust', 'professional development' and 'standard of care' emerge as dominant, and embed multiple and conflicting meanings within an overarching mode of control and discipline.

Professionals' learning within the CMA professional development literature and approach is construed as individualist, acquisitional and measurable. Our own approach to understanding professional learning is rooted in perspectives of learning as practice-based and embedded in everyday action (Billett, 2001; Bratton et al., 2003). We view learning as tied to people's work identities and sense of self and meaning in their work, which change over the career course (Chappell et al, 2003). It is social and interactive. The history of a professional group such as their educational experiences and the knowledge structures of their discipline also shape the ways they learn and how they value learning, or not. The

cultural norms, accepted practices, relationships and everyday objects/technologies of a particular professional community of practice or industry shape what is considered useful knowledge, e.g. what is normatively considered 'good' to learn, and what processes are recognised to be evidence of learning by different actors in the community (Engeström, 2001; Sawchuk, 2003; Wenger, 1998).

### **Study Methods**

This project was intended as a pilot study to explore whether the dynamic of 'age' and its various meanings played a significant role in professionals' learning and conditions of practice, and whether management accounting would be a useful site for further study of learning practices in situ. The present study so far has combined survey and interview methods. Working with the CMA association we developed a survey for all practicing CMA professionals (all ages) to examine their perceptions, practices and challenges related to learning, and to explore their perceptions about 'older' CMAs' learning practices and challenges. We sent email invitations to all registered CMAs in Alberta (5487) to participate in this web-based survey: a total of 816 responded, which we felt was unusually high given typical response rates for such surveys and the time of year. Of these, 34% identified themselves to be 50+ years of age. From the submitted surveys, we received over one hundred requests for a personal interview, which was surprising to both ourselves and the professional association. After survey data was analysed we conducted personal in-depth interviews with 60 self-nominated 'older' CMAs (50+ years). Questions explored their changing conditions and relations at work in their particular organizational environments, their changing knowledge and learning practices, and their perceptions about whether age played a role in these dynamics.

### **Findings and Discussion**

In our findings to date we discovered that older CMA professionals indeed report some devaluing of their knowledge, some age discrimination in a youth-focused workplace, some physical difficulties, and declining interest in learning opportunities of a particular form. It appears that this group does share certain distinct generational values, social practices, attitudes to work and learning, and life experiences. On the whole these 'older' workers tend to desire to continue meaningful work, but some face systemic barriers that younger employees do not encounter. These barriers can include (1) certain skills no longer in demand, and a perception of lacking relevant skills for some growth industries and sectors of the economy; (2) a lack of recognition for their years of experience and expertise; (3) less willingness to be geographically and/or occupationally mobile for an employment opportunity, for reasons of cost and risk; (4) some negative stereotyping by employers, the media, and colleagues about their capacity; (5) professional development programs viewed by some as inaccessible and/or inappropriate to the needs and interests of older professionals; and (6) a sense of having more to teach others than to learn. Learning practices most valued tended to be experience-based, rooted in solving non-

routine problems or leading new initiatives. Many described a sense of rejuvenation around their work, a desire to continue but to exercise greater independence and control over their work. However, several noted tensions around the generational jostling in their workplace particularly concerning what forms of knowledge are valued most, and who is granted epistemic authority in collective work activity. Reward structures, work assignments, and identity positions were all areas where age played out as a marker of power in the workplace relations. This forces older workers into a particular kind of learning that undermines their own identities, work history and knowledge.

In effect, these older professionals receive double messages related to their age. On one hand they encounter discourses in their discussions with clients and supervisors reiterating the value of their 'experience' and maturity; on the other, they are sometimes treated as sunset watchers, waiting for retirement amidst subtle encouragements to make way for younger professionals. The biologized discourse of decline is not explicit in their interactions with colleagues and clients, but may hover in nuanced references to their energy and capacity for particular activities. Their work experience is rhetorically valued but in practice, they may be questioned in terms of their reliability: how 'up-to-date' they are on procedures, technology or management approaches. Problem-solving, both related to accounting and to human relations in organizations, is a major part of their work and an area of practical embodied knowledge in which some take personal pride. This knowledge may or may not be valued, sometimes classified as 'traditional', 'old school' or even 'rigid'. Mentorship is a role they may be assumed to want to engage in organizations.

Continuous learning of the sort promoted through the CMA professional association was described as uninteresting or inappropriate for their career stage by 32% of the 50+ CMA survey respondents while 42% of the same age category replied that no need for further competence development was necessary. Those we interviewed indicated that continuing education tends to focus upon straightforward competency development in areas that they viewed as routine. Further, their interest in the nuanced complexities of cases and organizational dynamics such as micro-politics and conflicting stakeholder interests were rarely addressed in CPD. Typical delivery methods (mini-lectures, case study learning, or text-based modules presenting problems of practice and questions) were sometimes viewed as banal or tedious, teaching the obvious. Some interviewees noted that continuing education sessions and materials made little effort to distinguish among participants' different industry-specific needs and experiences, their knowledge, and their interests. Some felt their own knowledge was under-recognized in PD offerings. Most believed that their CMA-related knowledge interests as older professionals were much different to those of their younger colleagues.

For their own learning, many typically turned to books and journals (50.4% of the 50+ survey respondents) as well as valuing their everyday challenges as complex learning opportunities. In fact, the knowledge areas in which interviewees indicated primary interest included concerns about the changing nature of the CMA profession, the effects of the political economy on CMA practice, new challenges of accounting practices across

transnational contexts, and issues of ethics in relation to accounting practice. However, their personal pursuit of these issues in books and news was often constructed as separate to what the CMA association recognized as PD. The 'educator' in their professional learning was, to most, assumed to be the appointed facilitators of planned continuing education events. While many distanced themselves from engaging such events, they were compelled like all CMAs to maintain licensure by submitting declarations of their continuous learning in terms of its specific links to the competency areas. This exercise was identified by many as a necessary if rather irritating requirement. But it did position them as subject to the disciplining gaze of the educator as assessor of professional learning. In the final analysis, the educator in both these iterations is constructed as controlling and regulating particular forms of knowledge and particular processes of learning to define what it means to practice management accounting. Older professionals appear to view these knowledges and learning processes as at best irrelevant to their own specific practice contexts and activities, and at worst as naïve and limiting.

Many themes here are salient to the emerging research focus on the so-called 'older worker'. But to focus on the present issue of responsibility for education and training and its delivery, the findings here demonstrate certain problematic assumptions underlying educators' interventions in professional learning. In adult/continuing education literature there arguably persists a redemptive desire, premised upon a belief that professional 'learning' without the enlightened guidance of the educator may simply reproduce dominant undesirable patterns (declining collectivism, erosion of professional autonomy, social inequities, injustice and oppression, and so on). In the case of older professionals within the continuing PD contexts of CMA practice reviewed here, the educators' attempt at such discipline is often unsuccessful. Educators could assume various implications from this: (1) that more 'age-appropriate' technologies of pedagogy need to be deployed; (2) that overly strict correspondence of PD with a skill-specific technical competency framework is to blame, and that other views of knowledge and educational purposes (emancipatory, feminist, cultural-historical, emergentist etc) would be preferable; or (3) that the presence of an educator regardless of educational purpose in older professionals' activity pedagogies professionalism in ways that may close possibilities rather than opening them.

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## Attitudes Towards Higher Education in a Blue-Collar Economy

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**Abstract:** Is there a need for university education in Alberta? The economic opportunities within Alberta's industry-based economy may provide an alternative to PSE. This study will involve a longitudinal examination of the opinions Albertans have towards PSE over time.

How much education is required to get ahead in Canadian society? This is a question that many have an opinion on, whether they are a high school student on the cusp of graduating or an adult who has been actively engaged in the labour force for many years. It would seem as though most Canadians agree that it is important to graduate from high school and receive a post-secondary education in order to successfully compete in today's job market. In fact, in terms of educational attainment, Canada leads the world in its levels of post-secondary education (Livingston, 2001). However, accompanying the unprecedented levels of educational attainment within Canada is an emerging "education-job gap" and the complementary issue of underemployment. Underemployment implies the under utilization of labour and can manifest itself in a variety of forms. For example, the term can describe the employment of workers with high skills in low wage jobs or involuntary part-time or casual employment.

While the underemployment of well-educated workers is an issue in most provinces, Alberta is faced with a somewhat different labour market "mismatch" issue. In 2006, many of Alberta's blue-collar occupational groups had unemployment rates of less than three percent, indicating a severe skill shortage in many labour market sectors. This shortage of skilled labour is a result of Alberta's strong economic growth over the last ten years. According to Alberta Employment, Immigration, and Industry (2006), between December 2005 and December 2006, employment grew by 5.6%, or 100,900 people, compared to 2.1% for all of Canada. Projected labour market shortages indicate a potential shortfall of more than 86,000 workers by 2015 (Alberta Government 2006). Skill shortages were reported in most occupational areas with particularly high demands for those in the skilled trades and in the oil and gas industries.

In light of these economic conditions, is there an overwhelming need for formalized university education in Alberta? Or, rather do individuals feel there is a need for a university education or is technical training viewed as more valuable? The labour market opportunities within Alberta's industry-based economy may provide an alternative to post-secondary education (PSE), thereby encouraging a direct transition from high school to the labour market, or transitions via community college or technical schools. This paper will explore the assumed link between attitudes towards PSE, specifically the differences between a university education and community college/technical school training, in a



strong service and technical-based economy. Arguably, in an economy presented with opportunities that require the more specialized levels of technical education that can be obtained within community colleges, technical schools, or apprenticeships, will lower value be placed on university education?

This research employs a longitudinal examination of the opinions Albertans have towards post-secondary education by comparing the responses from the 1988 *Alberta Survey* and the 1995 *Public Affairs Survey* with those of the 2007 *Alberta Survey*. This comparison will be of particular interest because, in contrast to the current overheated labour market, in 1988 and 1995, Alberta was recovering from two concurrent economic recessions where occupational opportunities were limited and unemployment was high.

### **Why Would Economic Shifts Affect Educational Participation?**

Society has taught us that education is essential for getting ahead in life. Research is consistently illustrating the value of increased education in making a smooth transition into the labour market, decreasing the likelihood for periods of unemployment, and increasing earnings potential (Davies 2006; Krahn and Hudson 2006). For example, in 2004, the unemployment rate among individuals aged 25 to 44 years who did not have a high school diploma was 12%, compared to 7% among those who did have a high school diploma (Bowlby 2005). Following this trend, unemployment rates continue to decrease as educational attainment increases.

In recent years, Canada has seen percentage of young adults dropping out of high school decline. Specifically, between 1990/91, 17% of 20 to 24 year olds were considered to be high school drop outs, defined as those who do not have a high school diploma and are not attending school. By 2004/2005, this percentage had decreased to 10%. While national trends in school drop-out rates are decreasing, regional analysis show great variation between Canada's provinces. While current drop-out rates still remain lower than they did during the 1990-1991 and 1992-1993 school years, dropping out is still an issue in some areas of Canada, particularly in Quebec and the Prairie provinces. Within Alberta, 12% of youth had discontinued their education before graduating in high school, only to be exceeded by Manitoba where 13% had dropped out of high school (Labour Force Historical Review, 2007).

While research has consistently demonstrated the benefits of increased education, differences in employment rates among high school drop outs were quite pronounced between provinces. In particular, according to Bowlby (2005, page 6), drop outs in Alberta were the most likely to be working in 2004/2005. While employment rates for Canadian drop outs in general were approximately 62%, in Alberta, 69% of high school drop outs were employed. This percentage is higher than the rate of employment for Canadian high school completers, aged 20-24 years, where 68% were employed in 2004/2005.

A weak labour market, characterized with high rates of unemployment, has been argued to increase public perceptions on the value of higher education as a means for facilitating labour market integration. Specifically, Raffe and Willms (1989), argue that

unemployment not only affects those who are currently unemployed but also it may influence those who are either active participants in the labour market or those who are still in school. Unemployment and other labour market characteristics arguably form much of the context of education; that is, participation in post-compulsory education (Raffe 1987). Often, this type of context (i.e. a powerful economy), generates market signals to the education and training system which are, either from an educational or an economic standpoint, distorted.

This context lends itself to Gambetta's (1987) theoretical hypothesis of 'pulling forces' which argues that the attitudes held by youth towards post-compulsory education are composed of underlying processes that lead to either leaving or staying. Specifically, Gambetta (1987) and Gordon (1981) distinguish between 'push' and 'pull' factors. The 'push factors' are often related to a young person's rejection of (or by) the school, and may reflect differences in class, gender, family, and peer group pressures. On the other hand, the 'pull factors' comprise 'the attractions of work, or rather, the attractions of the money that will be gained from working [which] tend to pull [youth] out of full-time education and into employment' (Gordon, 1981: 133). These phenomenon comprise what has been coined, "the discouraged worker" hypothesis.

The discouraged worker hypothesis posits a link between local unemployment rates and the tendency to prolong education past the mandatory required period. The assumption is that labour market conditions at the end of the preceding calendar year are vital in school-leaving decisions (Merriless, 1981). Specifically, young people are argued to prolong their education as reaction to unemployment or will leave as soon as they are legally able in a strong labour market. Following the 'discouraged worker' hypothesis, when the labour market is weaker, Gambetta and Gordon's theoretical proposition posits that the 'pull' factors will pull less hard. On the other hand, when the labour market is strong, the 'pull' factors will be more appealing. Following this argument, the societal impact of unemployment should yield more positive attitudes towards the necessity of post-secondary education. Under conditions of severe labour market shortages, particularly in the area of skilled trades, opinions regarding the necessity of post-secondary education, particularly a university education, should decrease.

During the time period under consideration (i.e. 1988, 1995, and 2007), large variations were found in unemployment rates. In particular, unemployment peaked in 1993 and 1994 with economic recovery beginning in 1995. In contrast, unemployment remains at its lowest in decades within Alberta at less than 4% (Labour Force Historical Review, 2007). Due to the current high levels of economic productivity, Alberta provides a unique point of interest.

Within Alberta, employment in the natural resource based industry more than triples that of the rest of the country as a whole (27% versus 8% respectively). In addition, Alberta is also experiencing high levels of employment in the construction sector, a likely consequence of the province's prosperity in the oil industry (Labour Force Historical Review, 2007). The nature of employment in these sectors does not necessarily require

high levels of formal educational training; rather, skills can be accumulated through on-the-job training and apprenticeships.

With unemployment low and avenues for opportunity high in the semi-skilled labour sector, one could argue that attitudes held by the general Albertan population would be less focused on university-based post-secondary training and more focused on the necessity of technical training as these skills are more reflective of the current labour market situation. As the 2007 Alberta Survey does not interview young adults exclusively, this research evaluates the overall opinions held by Albertans in general. By understanding how attitudes towards education are shaped by labour market conditions, one may be able to draw connections to future educational participation among the younger generation.

### **Do Economic Shifts Affect Opinions Towards the Value of a University Education?**

In 2007, respondents were asked, on a scale ranging from disagree to strongly agree, to rate questions concerning how much education individuals require. First, respondents were asked whether people require higher levels of education than they did in the past. The majority of respondents, 85%, either agreed or strongly agreed. Respondents were then asked if in order to get a job, you really need to continue your education after high school. Again, the majority of respondents agreed or strongly agreed with this statement (90%) suggesting that generally speaking, Albertans recognize the value of educational attainment past high school.

*Table 1: How Much Education Do Individuals Require?*

	disagree	neither agree nor disagree	agree	strongly agree	Total (N)
People require higher levels of education than they did in the past	8.4	6.4	47.5	37.7	1,195
To get a good job, you really need to continue your education after high school	6.8	4.4	42.7	46.2	1,200

Source: Alberta Survey, 2007

In the 2007 Alberta Survey and the 1995 Public Affairs Survey, respondents were asked whether they felt university graduates have a broader range of knowledge than other graduates. In 1995, participants more frequently indicated that they strongly agreed with that statement (22%) compared to responses given in 2007, where 34% indicated they disagreed. When asked if they felt university graduates develop better thinking skills than other graduates, 43% in 2007 disagreed while only 27% stated the same in 1995. Respondents were also asked if they felt college and technical graduates are more likely to get jobs than university graduates. Slightly more respondents (53%) in 1995 agreed and strongly agreed with this statement compared to those in 2007 where only 46% agreed. Respondents were then asked whether they felt that college and technical schools offer

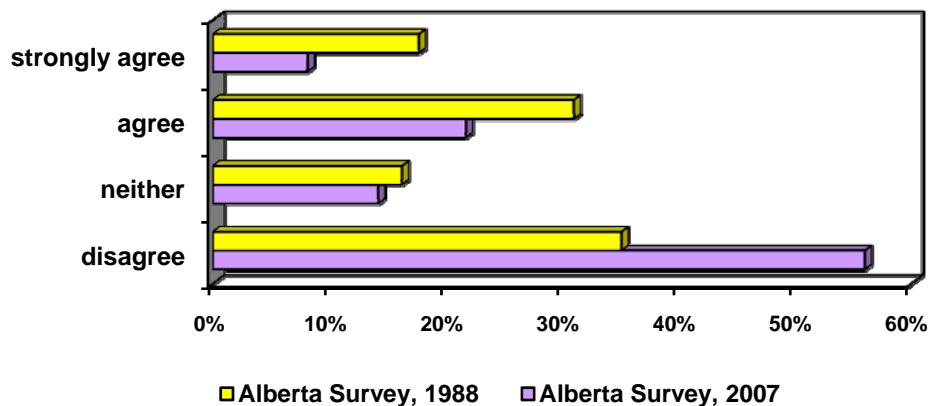
more practical training. In 2007, almost 80% indicated that they agreed or strongly agreed with this statement compared to 71% of respondents in 1995.

*Table 2: Comparisons of University and College/Technical School Graduates and Programs*

	Source	disagree	neither agree nor disagree	agree	strongly agree	Total (N)
University graduates have a broader range of knowledge than other graduates	Alberta Survey 2007	33.6	15.1	37.2	14.1	1171
	Public Affairs 1995	20	19.6	38.6	21.6	881
University graduates develop better thinking skills than other graduates	Alberta Survey 2007	43	17.5	30.6	9	1178
	Public Affairs 1995	26.8	24.9	33.8	14.5	878
College and technical graduates are more likely to get jobs than university graduates	Alberta Survey 2007	30	23.8	37.4	8.7	1159
	Public Affairs 1995	22.3	25	37.3	15.4	878
College and technical schools offer more practical training	Alberta Survey 2007	10.8	10.2	49.2	29.8	1146
	Public Affairs 1995	13.4	15.8	42.3	28.5	860

Respondents were asked if in order to get ahead in life, you really need a university education. In 2007, 56% disagreed with this statement compared to 35% in 1988. This suggests that while Albertans are concerned about education past high school, their focus may not be on a university education in particular, rather, on education in general.

*Figure 1: To get ahead in life, you really need a university education...*



While the majority of respondents in 2007 feel that individuals do not need a university education to get ahead in life, are particular groups of respondents more likely to feel this way?

*Table 3: Likelihood of disagreeing that in order to get ahead in life, individuals really need a university education, 1988 & 2007*

<b>Area</b>	<b>B (1988)</b>	<b>B (2007)</b>
Metropolitan Edmonton	1.494 **	.727
Metropolitan Calgary	.636 ***	1.049
Other Alberta	1.052	1.312
<b>Gender</b>		
females	.823 *	.984
males	1.216 *	1.016
<b>Age</b>		
18-24	1.196	.233
25-34	1.101	5.462 *
35-44	1.052	1.238
45-54	1.053	.797
55-64	1.157	1.242
65+	.592	.670
<b>Highest Level of Education Attainment</b>		
less than high school	1.336	1.098
high school	1.363 **	.954
some post-secondary	.825	.305 *
college/technical institute	1.636 **	2.239 *
university	.407 ***	1.398
<b>Annual Household Income</b>		
<\$29,999	.930	.737
\$30,000 to \$44,999	.782	.997
\$45,000 to \$64,999	1.241	2.571 *
\$65,000 to \$84,999	1.108	.750
\$85,000 to \$99,999		2.539
\$100,000 to \$124,999		.495
\$125,000+		.562
<b>Industry</b>		
Goods producing sector	1.031	2.314 *
Service producing - upper tier	.757	.906
Service producing - lower tier	1.280	.477 *
<b>Are you currently unemployed?</b>		
No	1.278	2.049 *
Yes	.782	.488 *

\*\*\*p ≤ .001 \*\*p ≤ .01 \* p ≤ .05

In 1988, respondents living in Metropolitan Edmonton, compared to the rest of the province, were 49% more likely to disagree that a university degree is required to get ahead in life. Those living in Calgary were 34% less likely to say the same. In 2007, no statistically significant differences were observed between Alberta regions. Compared to the average respondent, in 1998, females were 18% less likely to disagree that a university

education is required to get ahead in life. On the other hand, males were 22% more likely to disagree. No statistically significant findings were observed in 2007. In 2007, compared to all other age groups, respondents between the ages of 25 to 34 years of age were over 500 times as likely to disagree that in order to get ahead in life, one needs a university education. No statistically significant findings were observed in 1988. With respect to educational attainment, in 1988, respondents with a high school education were 36% more likely than the average respondent to disagree that a university education is required to get ahead in life. Those with a community college/technical education were 64% more likely to indicate the same. Respondents with a university degree or higher were 60% less likely to disagree that a university education is required to get ahead in life. In 2007, respondents with a college education were over 200 times as likely to disagree. While no statistically significant findings were observed in 1988, in 2007, when compared to all other income levels, those earning between \$45,000 to \$64,999 were over 250 times as likely to disagree that a university education is required to get ahead in life. In 2007, those who were employed in the service producing sector were 230 times more likely than the average respondent to disagree that a university education is required to get ahead in life. Those in the lower tier service producing sector were 52% less likely to disagree with that statement. In 1988, no statistically significant findings were observed. While no statistically significant differences were observed in 1988, in 2007, respondents were employed were over 200 times more likely than the average respondent to disagree that in order to get ahead in life, one requires a university education. In contrast, those who were unemployed were 50% less likely to disagree with that statement.

### **Conclusions**

So, what does this analysis tell us about attitudes towards education in different labour market conditions? First, attitudes towards PSE have changed over time. However, unlike Gambetta's (1987) theoretical hypothesis of 'pulling forces', Albertans still feel that education past high school is important for succeeding in life, although, the focus has shifted away from universities to community colleges. While high school drop-out rates are still higher in Alberta than in most provinces, the discouraged worker hypothesis does not seem to be supported in the way it had been initially posited. Rather than being pulled directly into the labour market, Albertans generally see PSE as an important component in being economically competitive, however, community colleges and technical institutes are often viewed as the way to accomplish this feat. While conclusions can not be made regarding the actual trends being observed among youth, general attitudes towards the necessity of acquiring practical skills have increased over time.

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## Obtaining Education Awards that Directly Result from Validated Workplace Competence and the Lessons Learned So Far

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**Abstract:** Holding an award like a ticket, certificate, diploma and/or degree does not prove competence. What proves competence is subject matter experts, who themselves are validated competent, confirming worker competence through accepted principles and practices of validation in the workplace. Then, based on the validation report, an award can be granted that acknowledges competence. The same validation process is helpful where foreign trained workers compare and apply for credentials in other countries.

Setting: Workplace Theatre in Any Organization, Any City

Characters: Managers and the People Who Help Managers Make Competence Happen

*As the curtain opens ...*

*A manager is sitting at her desk. A pensive face suggests reflection.*

*A knock on the door has her glancing at her desk clock. She remembers the meeting in the room down the hall.*

*Getting up and leaving her office she overhears a conversation in the hall way. She slows down.*

*The taller man addressing two others asks, "Are your people competent?"*

*The shorter man responds with a quizzical look, "I think so."*

*Following the first question, the taller man asks "How do you know?"*

*The second younger manager offers, "Hmm, well ... they all have their qualifications. They must be competent!" After a quick moment, the younger manager adds, "I just assume they are! Right?"*

*Leaving the group, continuing to the meeting room the manager thinks "Are my staff competent at what they do? How do I know?"*



*The scene fades to mist ...*

*A few seconds later two senior educators from World ICU emerge from the mist.*

*They are lively in their conversation. Moving to the front of the stage, you hear them sharing their story of why and how they are creating a community of competence with the help of education institutions and workplaces in Canada and abroad.*

*They are discussing two current examples, one from the oil and gas industry and the other from municipal services.*

*In addition, they are conferring on how their workplace education technology is useful to foreign trained workers are entering the Canadian workforce.*

### **Background to the Workplace Theatre Presentation**

Managers from every organization, everywhere in the world seek an answer to the question, “Are my people competent?” Instead of seeing their staff engaged in busyness, managers seek the ways and means to engage their staff in business. Managers can no longer assume people are competent at what they know and do. Managers seek a simple, to the point, way of tracking and confirming competence of their staff.

The lack of competence costs companies and organizations billions of dollars over years, months and for some organizations over days. It can cause mistakes and conflicts resulting in legal and workplace consequences. Lack of competence reduces the effectiveness of the workforce and has a direct impact on productivity, profitability, job satisfaction, customer confidence and human motivation.

As examples: Have you ever taken your car in for repairs to the ‘experts’ only to be disappointed by the results? Have you wondered how someone got promoted to a managerial position knowing there is someone more competent in the department? Numerous other questions dot the workplace landscape.

Of the performance evaluation tools currently in use, most DO NOT measure competence. They are tools recording the likes and dislikes of one person by another person. Upon filling in these forms, the “recency effect” guides the comments on the forms. What has happened most recently influences the comments on the performance review. In addition, sliding rating scales of competence muddy the performance review for differences between a score of 4 and 5. And if it is 4.5, what does that mean?

### **Important Terms and Concepts within the Story**

In order to bring the story of competence to any organization it is first helpful to define the key terms and concepts associated with competency-based human performance:

- *Competence* is the confirmed knowledge, skill and attitude of a person. It can be measured against a competency as determined by a Validator who is a subject matter expert in the competencies they validate.
- A “*competency*” is the action-based statement of knowledge, skill and/or attitudes required and requested of a person that will be validated by a subject matter expert called a *Validator* to determine competence.
- *Validation* is the method by which accepted principles and practices of performance review are used by a Validator to validate the competence of a person regarding the stated competency. The continuous validation process includes quality assurance in validating including re-validation upon shelf expiration of competencies and/or the addition of new competencies.
- *Subject matter experts* are organization identified people whose knowledge and skills are recognized as helpful in identifying competencies and/or to serve as Validators.
- *UTRAC* is the Internet-based technology through which competencies are profiled, competence is recorded and Validators enter their confirmation of a person’s competence. Through UTRAC people apply for awards from education institutions and professional associations based on their competence validation.

#### **UTRAC’s 7 Interlocking Processes of UTRAC**

1. Profiling - write customized competencies to develop profiles
2. Self-Assessing - individuals assess their confidence in knowledge and skill
3. Validating - individuals are validated competent by a Subject Matter Expert
4. Educating - where people require training, learning and development or a refresher, they seek education support to fill the knowledge and skill gaps
5. Tracking - managers use UTRAC to follow peoples’ competence, plan training, create succession paths, ensure time sensitive training is current
6. Awarding - upon verifying an award submission an award is granted or credits given from higher education, professional associations and/or the employer
7. Managing - managers are supported in managing making competence happen for their own career development and those they manage, and to support their corporate/community/university infrastructure

#### *Oil and Gas Story: Using UTRAC*

Keyera in concert with its award provider Lakeland College, using Keyera’s CMDS system (a branded version of UTRAC), offers three midstream oil and gas certificates.

1. Field Production Certificate
2. Gas Processing Certificate
3. Pipeline Operations Certificate

Since April 2004, 1047 certificates have been awarded to Keyera's end user group clients. This same arrangement is tracking to graduate 1000 more people within the next year. Also, the certificates obtained through the validation process are recognized for the first year of the Petroleum Supervisor Diploma available through Lakeland College. Participants holding certificates obtained through UTRAC are currently engaged in obtaining their diploma.

#### *Municipal Services Story: Using UTRAC*

In 2006 the City of Calgary Animal Bylaw Services with its award provider NAIT, using World ICU's UTRAC system makes available two municipal services certificates.

1. Bylaw Officer 1
2. Bylaw Officer 2

Two certificates have been issued. The organization is tracking to graduate 100+ staff by fall 2009.

#### *Two Additional Stories: Using UTRAC*

World ICU has issued 67 Health Care Personal Care Attendant Certificates through Lakeland College.

400+ people are moving forward to acquire one or more of three Well Servicing certificates available through NAIT

1. NAIT Oil & Gas Well Servicing Floor Hand Certificate
2. NAIT Oil & Gas Well Servicing Derrick Hand Certificate
3. NAIT Oil & Gas Well Servicing Service Rig Operator Certificate

Holders of these NAIT Well Serving certificates can apply through Lakeland College for entry into the second year of the Petroleum Supervisor Diploma.

#### *Foreign Trained Workers Story: Using UTRAC*

AB Nursing Association used UTRAC to guide the intake of nurses from Asia.

Calgary Catholic Immigration Services uses UTRAC as a career development and management tool in counselling new Canadians on matching current work-related knowledge and skills with potential jobs in Canada.

### **Lessons Learned So Far that have Application to Workplace Education and Workforce Learning**

Training does not equal competence. However, training contributes to the education process of a person to be validated competent. The traditional approach for granting awards using written exams and project submissions is one way to indicate if a person has acquired the knowledge and skill presented during the education event. However, certificates, diplomas and degrees achieved following the traditional approach cannot confirm what a person knows and can do by simply acknowledging they have the

parchment. It is upon a subject matter expert validating a person's competence, that a true measure of a person's knowledge and skill will be revealed and confirmed.

Many people with awards issued traditionally are not competent. Also many uncertified people are extremely competent, as is evident by the number of uncertified people in many occupations who run multi-million dollar organizations and facilities very successfully.

Apprenticeship programs and co-op terms from university extend knowledge and skill. Many co-op and practicum experiences are limited in that the employer is not willing to take a chance from a liability perspective and from an effectiveness perspective on student workers. Thus many practicum students end up doing trivial tasks. Yes they get exposure to the real world in their fields, but gain little practical competence. It is not until the student is hired as an employee that they get the real hands-on experience that they need to become competent, and this competence will take several years to accumulate.

In addition, when using SME validation, the educator and the process of education are validated. This triangulated perspective is what brings full circle the learning-educating cycle.

Workplace education and workforce learning are evolving with the improvement in technology platforms. The plethora of learning management and learning content management systems available on the market prove this point.

Newer methods of measuring knowledge dispel the myth that if I had to spend two, three or four years to get my higher education award then that is how it must be for the next generation entering the workplace. Generational learning requirements have shifted since the traditionalist and baby boomers went through school. The learning savvy of the Generation Y and Millennia cohorts suggest other ways of recognizing learning are needed.

Employers have difficulty in taking new graduates at face value! Every new employee must go through a probationary period, not just to determine if there is a personality fit, but if the new employee has the skills that are required. This will not be the case using a competency-based interview of the self-assessment data potential staff submits at time of recruitment and/or during career adjustments.

What is missing is a common denominator that will allow confidence in the results of knowledge and skill (human performance) measurement. Through World ICU's UTRAC, employers and award providers can state categorically employees as learners have met academic rigor and knowledge/skill measurement. For employers, that information can be applied in the workplace and that skills are current.

Validated competence not only provides the employer with information as to who is competent and who requires training, but also provides the employee with confidence of their knowledge and skill, and thus the ability to perform in abnormal situations (e.g. plant upsets, troubleshooting situations, dealing with new situations, etc.)

Because learning is a common denominator in all workplaces, among all employees, then its recognition requires considerable attention. No matter the job, the inherent learning from the preparation to do the job, doing the job, the outcome of the work and

evaluative/reflective considerations of the job are prime learning moments for the individual, the group and the organization.

The advent of corporate universities moves the learning organization and knowledge-company further along the organization learning evolution path. Web 2.0 and Enterprise 2.0 platforms are encouraging new approaches to how organizations organize learning. The social realm of learning is expanding. In addition, World ICU offers the combination of all of these developments under the banner of its Competency University program.

Competence validation brings more people to higher education and professional association doorsteps. Some workers who never thought they could obtain higher education and professional association awards beyond what they have already can now expand their portfolio.

Still, the path of competence validation is not a straight line. However, World ICU's UTRAC system offers the straightest line to access learning-action recognition while at the same time improving the education levels of organizations and society.

### **Summary**

If education is the key to a better life, and a better life is what the workplace offers, then let competence validation and higher education and professional association's acknowledgment of validated competence be the path that allows people to experience the joy of living through meaningful and recognized work.

# Learning for Healthy Lives: An Analysis of How Communities Learn about Nurse Practitioners through Cultural Historical Activity Theory

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**Abstract:** This paper examines how communities learn about the changing role of health professionals like Nurse Practitioners in Nova Scotia. In addition, we also explore how our research method of Cultural Historical Activity Theory (CHAT) can illuminate the complex intersections of work and learning, and healthy lifestyles.

## Introduction

Nova Scotia, among other provinces, has recently turned to the burgeoning profession of Nurse Practitioners to provide valuable resources in operating health clinics. Nurse Practitioners (NPs) are able to provide diagnoses and prescriptions for common diseases/conditions to people that may otherwise not have access to primary health care services. In addition, NPs offer many valuable community health promotion and illness prevention programs to Nova Scotians across the lifespan. This paper examines how communities learn about the changing role of health professionals like NPs, and specifically how rural Nova Scotia patients learn their way into relationships with evolving webs of community health professionals.

To accomplish this task, we employ a method of Cultural Historical Activity Theory (CHAT). CHAT has been developed as a neo-Marxist social science method that builds upon the work of Vygotsky (1978). One of the benefits of CHAT is that, as a dialectical theory of learning, it “theorizes persons continually shaping and being shaped by their social contexts that immediately problematize knowledge as something discrete or acquired by individuals” (Roth & Lee, 2007, p. 189). As such, when applied to work and learning contexts, CHAT allows for an investigation of the ways in which people’s learning is enabled or constrained by their communities, its rules, historical artifacts, and social structures.

## Nurse Practitioners in Nova Scotia

Primary health nurse practitioners (NPs) are registered nurses who practice at an advanced level to provide primary health care to communities. They use their advanced skills and knowledge to manage acute and chronic disease as well as to promote health and prevent illness/injury (Sangster-Gormley, 2007). Nurse Practitioners have been practising

in Canada since the 1970's, primarily in remote and/or northern communities (CNA/CIHI, 2006). Increasingly, over the past decade, NPs have also been working in communities in southern Canada.

A Nurse Practitioner is a registered nurse with advanced practice education, and works in a collaborative relationship with doctors and other professional team members, to provide healthcare to individuals and communities (CRNNS, 2005). The scope of the work encompasses examining patients, diagnosing illness or injury, ordering labs and diagnostic tests, prescribing medications, treating individuals with acute minor illness, and manage chronic conditions. There is an emphasis on health promotion, lifestyle management, and injury and illness prevention (CNA, 2005). They may work adjacent to doctors within a practice, or in the community, clinics, community health centers, hospitals and nursing homes (Raey, *et al*, 2006). In Canada, there are Primary Health Care NPs and Specialty NPs, but for the purpose of this discussion, we are referring to the former group.

While Canada has a tradition of employing remote NPs it was not until the country started to realize a family physician shortage, a shift in thinking from curing illness to promoting health and preventing disease, and a shift from institutional care to more community based options, that a door was open to utilizing NPs (Dewitt *et al*, 2005).

In 2006, there were 1737 registered NPs working in every province and territory within Canada, and in 2007 alone there was a 30% increase in the number of physicians working with NPs (Issa, 2008). In 1999/2000, the province of Nova Scotia utilized its initial pilot sites to introduce 4 NPs. Presently, in Nova Scotia, there are 96 registered NPs with 37 Primary Health Care NPs working, predominantly in small towns and/or rural communities (CRNNS, 2008). The first nurse practitioners have been working in Nova Scotia for 8 years and new positions are being implemented yearly.

### **Review of the Literature on Nurse Practitioners**

To date, there is a wealth of evidence that speaks to improved health outcomes and increased satisfaction with this newer healthcare provider. Research shows that the quality of care provided by NPs was equal to that of physicians, with high levels of patient satisfaction with NP care (Brown, 2007; Horrocks, 2002; Raey, *et al*, 2006; Way, *et al*, 2001).

Much has been written about the barriers to the integration of NPs in health care. Two barriers significant to this discussion are the lack of public awareness of the role (DeWitt & Ploeg, 2005; Lindeke, 2001; Lindeke, 2004), and the lack of understanding of the role (Lindke, Bly & Wilcox, 2001; Lindeke, Jukkala & Tanner, 2005). It continues to be of paramount importance to educate the public on the scope of practice of nurse practitioners (Lindke, Bly & Wilcox, 2001; Gould, 2007). This raises the question of how the public learns about NPs

Increasingly, the community is becoming aware of nurse practitioners as health care providers. A recent article by Brown (2007) examined perspectives on NPs in independent practice. One thousand employees were surveyed and 90% knew about NPs, and 58% had

seen an NP. This study also identified that the users of NP service tended to be younger and female (Brown, 2007).

A literature review indicates a paucity of published research on how communities actually learn about the NP role, however, professional experience would suggest some of the ways in which the community learns of the role. These include; recommendation from family, friends, other health professionals, media, chance (coming in and being able to see NP that day), community events (education sessions by NP), and open houses. Lessons learned have confirmed the importance of having front line personnel such as receptionists and/or office nurses who are well versed in the nurse practitioner scope of practice. This point of inquiry can immensely facilitate the public's education about the care provision of the nurse practitioner. Although this gives us some indication of how patients come to make an appointment with a nurse practitioner, we still do not know how they first become aware of the NP and come to learn about the role and how it fits into the health care system as it relates to them. How does community learn about the NP role? By using the CHAT framework, we have attempted to explore this question.

### **Cultural Historical Activity Theory as a Research Method**

Yamagata-Lynch (2007) details that the origins of Cultural Historical Activity Theory (CHAT), are to be found in the work of Russian psychologist, Lev Semyonovich Vygotsky. Yamagata-Lynch highlights Vygotsky's importance as he "adapted Marx's political theory regarding collective exchanges and material production to capture the coevolutionary process individuals encounter in their environment while learning to engage in shared activities" (p. 454). The concept of shared activity is what has developed into the theory of activity systems. What made Vygotsky's work crucial to the development of CHAT is, as Yamagata-Lynch explained in the quote above, the *coevolutionary* aspect of the relationship between the environment and the actors in it. Often, the literature will refer to CHAT as a relational or dialectic sociological tool. While both of these terms have developed a bit of ambiguity because of their frequency and lack of specificity in their usage, inherent to the meaning of both is the recognition of this coevolutionary interplay between environment and actors.

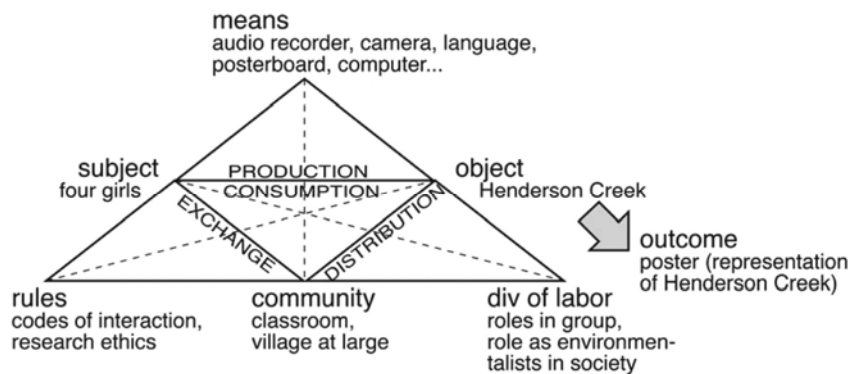
When we apply the understanding that we evolve and act within the context of the natural and material worlds, our attention is drawn to the fact that our systems of activity are enabled and constrained to historical and material factors. This echoes Marx's (2005) preamble in *The Eighteenth Brumaire of Louis Bonaparte*, when he states that "Man makes his own history, but... he does not make it out of conditions chosen by himself, but out of such as he finds close at hand" (p. 1). The concept of activity that is altered by our material conditions was explained by Vygotsky as mediated action (Yamagata-Lynch, 2007). Yamagata-Lynch continues on to note that "Vygotsky explained mediated action as a semiotic process between subject/individuals, mediating artifact/tools, and the object/goal of an activity.... This process guides and influences the way individuals make meaning of the world, and it has been identified as the basic structure for mediated action..." (p. 454).



These concepts also provide a framework which “can potentially overcome a range of troublesome dualisms in education: individual versus collective, body versus mind, subject versus object, and theory versus praxis” (Roth & Lee, 2007, p. 218).

Early understandings of using mediated action drew researcher’s attentions to the tools or mediating artifacts, but second generation understandings also incorporated the concepts of rules, means, community, and division of labour. Below (figure 1) is an illustration of an activity system in a widely represented form of an activity triangle used by Roth and Lee (2007).

Figure 1. An example of an activity triangle used in Roth & Lee (2007, p. 198)



As CHAT grew in popularity, as well as in the complexity of the research that the activity triangles were used to understand, the second generation activity triangles were modified again. Roth and Lee detail that “Third-generation activity theory endorses the fact that all activity systems are part of a network of activity systems that in its totality constitutes human society” (p. 200). As such, the activity triangles like the second generation one in figure 1, soon had to be put into relation with other activity triangles. This network of activity systems “unfolds into two or more systems; the network is formed as activity systems lose their self-containment and exchange entities, including objects, means of productions, people, and various forms of texts” (Roth & Lee, p. 200). An example of how this is organized in the research context is Yamagata-Lynch’s (2007) research that groups activity triangles together to highlight the third generation shift that Roth and Lee referred to.

### Summary of Research Findings

Our research has shown that when we question how communities learn about NPs through a CHAT framework, the following points emerged:

1) While the term “community” is an elusive and expansive concept, NPs disrupt the activity of many components of the rules of the community at large. One such obstacle for the community to learn about NPs is the basic procedural rules pertaining to how people navigate the health care system. As professionals that incorporate wellness visits, as well as routine care, communities have been challenged to understand the role of the NP within

the context of a doctor-centered delivery model. Often the question will arise whether or not it is acceptable to visit the NP while still maintaining a relationship with the family doctor. Also, as mentioned in the review of the literature, as NPs tend to be female, there exists a gendered dynamic in how people traditionally viewed acceptable behaviour in disclosing intimate details to someone other than the family (and often male) doctor.

2) While the challenges to community rules impede learning about the NP, there are often factors that assist the community to learn the role of NPs. These include the accessibility and community based nature of the practices, as some NP even work in schools to reach a broader audience that traditional health care providers have not reached. As well, there are a number of “off site” NPs that are not located in doctor’s offices which increase knowledge of the position.

3) How communities learn about NPs has become easier in the past number of years due to the technological advances that allow patient file sharing records within the health care system such as electronic medical records (EMR’s). Sharing records has also allowed important learning within the health care teams as collaborative partners in health care have been exposed to the comprehensive nature of NP practice. This in turn allows for familiarity for the public, as they are exposed to knowledge of NPs from other members of the team, and also facilitates collaboration. The collaboration of health teams often manifests in a context for the public where they feel a positive environment to share health concerns. The technology appears as an aspect of the “means” within the CHAT triangle. It is important to note though, due to the disparity of wealth in certain contexts, there exists a difference of access to this technology even amongst the authors of this paper.

4) With the sharing of patient information and the implementation of team health care practices, the division of labour in the health care practice remains a confusing and ambiguous delineation. Where and when people should access the varying parts of a health care team remain a crucial part of the puzzle in communities learning about NPs. When people realize the shared nature of their information within the collaborative team, they are often pleased with the comprehensiveness of the care, and the strengths that each of the team members provide.

5) As we delved into the research, we quickly realized the necessity of utilizing a third generation CHAT analysis, one that incorporated multiple activity systems. By utilizing multiple activity systems, a significant contribution of CHAT is that it can reformulate our very view of the health system as a vast and proliferating array of interlinked action networks. It is possible to view each part of the broader action network as smaller action networks always possessing the basic relations of the CHAT triangle.

As such, the history of a CHAT network can be viewed as the development of a specific array of relationships within, and between, the elements of the specific network. As they move through time, and particularly as they run up against, and interconnect, with other action networks (either by sharing a common object or by becoming an object of the other network), action networks can experience disharmonies. There are a few ways we can try to understand these disharmonies: Are they the result of contradictions or

inadequacies within one of the particular realms of the practice network? In the case of NPs, one such change is taking place in the division of labour. This change in the division of labour may kick off contradictions in other parts of the practice network. For example, rules of interaction between individuals in a community may be challenged by the change in the division of labour. The rules that governed the patient -practitioner relationship might be challenged by the NP taking on tasks once designated to the physician. As well, it might generate contradictions in the tools. Some of these contradictions will manifest in the realm of the community, others will manifest in the subjects (using tools, following rules, aiming their actions at goals). Finally, is the action network itself, in contradiction with other action networks? Perhaps the initiative of NPs is in conflict with the action orientation of other aspects of the health care system who may be organized to serve an individualized model of health and not a more diffused or community oriented model of health underlying many NP initiatives.

6) By undertaking this research through a CHAT framework, all of the authors were struck by the prospect of CHAT changing the way we view healthy lifestyles as a system of activity/activities that is mediated by actors and the material world, and not simply a state of being.

The idea of understanding the history of an activity system and, diagnosing contradictions that might be present in that context, is a powerful tool that can open opportunities for positive learning responses. When people in action contexts are faced with contradictions, they often react by freezing existing patterns of interaction. Understanding the basis of the contradictions may help open more creative, cooperative, and transformative forms of action, and NP practice.

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# The Response of Blue-collar Workers to New Technology in Manufacturing

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**Abstract:** In an exploratory study, the dimensions of blue-collar worker response to new manufacturing technology are investigated. Further, the relation among worker characteristics, learning environment, the attractiveness of the innovation and worker response are characterized.

Modern manufacturing settings constantly struggle to preserve a competitive edge. Companies look to increase productivity, improve product quality, respond more quickly to the marketplace, and decrease operating costs, while complying with government safety and environmental regulations. Managers often invest in new or improved technologies to meet one or more of these goals, and technology change is happening at unprecedented rates in many manufacturing sectors. These innovations are planned at the management level, often with little or no input from the blue-collar workers on whom the company's production relies. As a result, by the time blue-collar workers learn of the change, it is a "done deal" and their task is to adapt to externally imposed changes that can profoundly affect their jobs. To date, scholars have examined many aspects of technology change, but more often from managerial perspectives focusing on process or cost-benefit data. Little effort has been made to understand and conceptualize the ways in which blue-collar workers respond to the changes that have come to characterize the manufacturing workplace.

The purpose of this study was to conceptualize and understand the responses of blue-collar workers when faced with externally imposed technological change. Two research questions guided the study:

1. How can these responses best be grouped into conceptually meaningful dimensions of response to imposed technological changes?
2. What are the determinants of these responses?

## Theoretical Framework

No area of the literature describes the response of blue-collar workers to imposed technological change. Therefore, this work was theory generating. It drew on several existing areas of the literature. These areas included diffusion of innovations, technological change management, the learning organization, and informal learning.

*Diffusion of innovations.* Rogers (1995) describes the diffusion of innovations through groups and organizations. This work assumes that the decision to adopt an innovation is voluntary. Therefore, the findings from this body of literature are not directly applicable to the situation where technological change is thrust upon blue collar workers.

However, some findings may provide ideas which are starting points for this work. For example, Rogers (1995) describes how opinion leaders affect the adoption decisions of new innovations. Likewise, opinion leaders might have an impact on the responses of blue-collar workers toward imposed change.

*Technological change management.* Several authors (Havelock & Havelock, 1973; Levine, 1980; Tornatzky, 1983) have described research associated with the implementation of innovations. Most of this literature describes innovations that are planned and implemented with the assistance of change agents. In most cases, the changes are isolated changes to an otherwise stable environment. This research was conducted from the standpoint of the organization or change agent, and did not focus on the responses of individuals to imposed change.

*Learning organizations.* Learning organizations are designed to stimulate learning at all levels (Senge, 1990; Watkins & Marsick, 1994). Social networking is an important part of learning in a learning organization (Marsick & Watkins, 1999). The responses of blue-collar workers to imposed technological change might depend on whether or not the change takes place in a learning organization.

*Informal learning.* Numerous authors have described informal learning and experiential learning in organizations (Cseh, 1998; Lave & Wenger, 1991; Marsick & Volpe, 1999). The literature indicates that the majority of workplace learning is informal (Stolovitch & Keeps, 1999). Presumably, informal learning is an important response to imposed technological change.

There was no coherent model or theoretical framework to describe the response of blue-collar workers to imposed technological change. However, these areas of the literature suggest some of the ways that these employees might respond to this situation.

### **Research Approach**

This data for this study was collected through the responses to survey questionnaire. The steps included survey development, validation, data collection, and data analysis. This process took approximately six months.

#### *Survey Development*

Items for the survey's central construct, worker response to new technology, came from three different sources. First, the literature of diffusion of innovations, informal learning, learning organizations, stages of concern, and technological change management was carefully reviewed for anything that might be a response. Next, the researchers reviewed the transcripts of two prior qualitative studies of change in the workplace. These transcripts were examined for dialogue that might be a response that blue-collar workers would have to technological change. Finally, a brainstorming session was held with four blue-collar workers from a manufacturing facility. The workers were asked to describe how they dealt with imposed technological change. The session was audio-taped and transcribed. This transcript was closely examined for responses to change. These

responses were also recorded in the database. The 220 items generated from this process were reviewed, refined and validated. The final questionnaire included 54 items related to this construct. The questionnaire was tested in a pilot study, given to 44 blue-collar workers (Reardon, 2004). The pilot study went well and the questionnaire was not modified.

The survey instrument also included three other sections to gather data on potential predictors of employee response. The first predictor construct was the learning culture of the organization. For this, I used the short version of the Dimensions of the Learning Organization Questionnaire© (DLOQ©), developed by Marsick and Watkins (2003) and validated in subsequent studies (Yang, Watkins, & Marsick, 2004). The short version consists of one Likert-type item per dimension and produces a unitary measure of learning culture. According to Yang, et al. (2004), there is a positive correlation between this score and the learning culture of an organization.

The second predictor construct was the characteristics of the technological change. The thought was that more daunting and difficult (to learn) changes might produce different worker responses than a minor change or a change that was desirable in some way. A search of the literature related to change and innovation did not reveal an instrument that measured the “attractiveness” of technological change. However, Rogers (1995) describes five characteristics that increase the rate of adoption. From these, a six-item measure was created that (hopefully) would measure the attractiveness of technological change. The scores from these items were summed to produce a unitary measure of attractiveness.

Finally, the survey questionnaire included a section on demographics. When completed, the survey consisted of 74 items, 54 to measure the central construct (employee response), seven to measure learning culture, six to measure the attractiveness of the innovation, and seven demographic measures.

### *Data Collection*

The target population for this research was blue-collar workers in manufacturing. Data were collected from twelve manufacturing sites throughout the southern United States. Each participant received a package with the questionnaire, a cover sheet soliciting their participation, a sheet describing their rights within the study, and an envelope to return the survey. Most of the surveys were distributed at shift meetings or training sessions.

Of the 583 packages distributed, 288 complete questionnaires were returned. The data were entered into a spreadsheet. The spreadsheet was examined for blanks or values that were not correct. A random audit of ten questionnaires was conducted to verify data entry. No errors were found.

## Findings

There were two goals of this study. The first was to discover the dimension of blue-collar response to imposed technological change. The second was to discover the determinants of these dimensions.

### *Dimensions of Worker Response*

The survey had 54 items designed to measure the central construct of blue-collar worker response to imposed technological change. Exploratory factor analysis was used to identify the dimensions of response.

Two traditional methods were tried at first. The minimum eigenvalue solution indicated the fourteen-factor solution. Examination of the scree plot is another traditional means of selecting the best solution. In this case, this method was ambiguous. It seemed to indicate solutions of four, seven or nine solutions.

The goal of this analysis was to find a factor solution that was conceptually meaningful with as few as factors as possible. Factor solutions were generated for the cases of two through ten factors using Varimax rotation. These solutions were carefully examined to determine if they were conceptually meaningful (Perdue, 1999). The seven-factor solution appeared to be the best possible solution. This solution accounted for 49.7% of the variance. The seven factors in this solution were named Disgruntlement, Job-security Concerns, Accommodation, Informal Learning, Resistance, Discussing the Change, and Formal Learning (Reardon, 2004, 2005).

*Factor I: Disgruntlement.* The first factor included twenty items with loading at or above 0.45. These employee responses seem to share disgruntlement as a theme. They reflect the anger, dissatisfaction, discontent and frustration of the employee and might be seen (from the viewpoint of the employee or the company) as undesirable responses.

*Factor II: Job-Security Concerns.* The second factor grouped responses related to employees' sense of security. These items mention concern over the ability to do the job, losing prestige relative to coworkers, and coworkers losing their jobs.

*Factor III: Accommodation.* The employee responses found in Factor III were labeled Accommodation because they seem to describe the employees' attempts to relate the imposed technological change to their environment. They describe the employees' attempts to teach others how to use the imposed technological change, or how they modified the change to fit their situation.

*Factor IV: Informal Learning.* Factor IV grouped employee responses that described some forms of experiential or informal learning. The high means for these items indicated that they were some of the strongest employee responses to imposed technological changes.

*Factor V: Resistance.* A common theme that cuts across the employee responses of Factor V is resistance to the imposed technological change. The employees did not want to adopt the imposed technological change and took steps to delay or avoid adoption. These



employee responses are different from Factor I: Disgruntlement since these employee responses reflect an action taken against the imposed technological change.

*Factor VI: Discussing the Change.* Factor VI included items related to the discussion of the imposed technological change. In the literature, this discussion is reported as social networking.

*Factor VII: Formal learning.* These employee responses are actions of the employees to take part in training or learning opportunities sponsored by the company or the implementers of the imposed technological change.

### *Predictors of Worker Response*

In this study, the unit of variance occurs at two levels. For example, one might conjecture that the learning culture of an organization is dependent on the organization. The structures that facilitate or impede learning will vary from organization to organization. However, the employee’s perception of learning culture may vary from employee to employee even within the same work unit. Hierarchical linear modeling allows the researcher to differentiate significant relationships at two or more levels (Raudenbush & Bryk, 2002).

In this case, the independent variables were the scores from the learning culture instrument (DLOQ), the scores from the attractiveness instrument (COTI), Race (African-American or White), Age, level of education (Education) and whether or not the respondent was a supervisor (Super). At the location level, learning culture score and attractiveness score were included in the model. All of the variables were included at the individual worker level. The resulting equations are below.

$$Factor\ score = B0 + B1 * Super + B2 * Race + B3 * Education + B4 * Age + B5 * DLOQ + B6 * COTI + R \quad (1)$$

$$B0 = G00 + G01 * MeanDLOQ + G02 * MeanCOTI + U \quad (2)$$

Equation 1 describes the level 1 model and Equation 2 is the level 2 model. The Factor score intercept, B0, is not a constant and depends on average location scores for learning culture and the attractiveness of the technological change. MeanDLOQ is the average score of DLOQ for each location and MeanCOTI is the average score of COTI for each location. COTI and DLOQ were group centered on these mean scores for the level 1 model.

These calculations were run seven times, once for each dimension or factor. Table 4 shows the results for each dimension.

*Table 4: Results of HLM for each dimension*

Factor	Fixed Effect	Coefficient	Standard Error	T-ratio	Approx. d.f.	P
I: Disgruntlement	Intercept (G00)	3.754	1.251	3.000	9	.016

Factor	Fixed Effect	Coefficient	Standard Error	T-ratio	Approx. d.f.	P
	MeanDLOQ (G01)	.036	.063	.572	9	.581
	MeanCOTI (G02)	-.240	.033	-7.246	9	.000
	Super (B1)	-.526	.191	-2.757	244	.007
	Race (B2)	.060	.119	.507	244	.612
	Education (B3)	.820	.048	1.702	244	.090
	Age (B4)	-.006	.006	-1.156	244	.249
	DLOQ (B5)	-.057	.017	-3.285	244	.002
	COTI (B6)	-.104	.019	-5.215	244	.000
II: Job-security concerns						
	Intercept (G00)	2.277	2.564	.888	9	.398
	MeanDLOQ (G01)	-.074	.139	-.529	9	.609
	MeanCOTI (G02)	-.052	.076	-.691	9	.507
	Super (B1)	.137	.227	.603	244	.547
	Race (B2)	-.344	.145	-2.381	244	.018
	Education (B3)	-.048	.057	-.835	244	.405
	Age (B4)	.010	.007	1.472	244	.142
	DLOQ (B5)	-.051	.020	-2.546	244	.012
	COTI (B6)	.044	.023	1.909	244	.057
III: Accommodation						
	Intercept (G00)	-.540	1.574	-.343	9	.739
	MeanDLOQ (G01)	.044	.079	.551	9	.595
	MeanCOTI (G02)	.025	.042	.596	9	.565
	Super (B1)	-.016	.241	-.068	244	.946
	Race (B2)	-.194	.150	-1.295	244	.197
	Education (B3)	.044	.061	.717	244	.474
	Age (B4)	-.007	.007	-1.046	244	.297
	DLOQ (B5)	-.024	.022	1.087	244	.279
	COTI (B6)	.077	.025	3.146	244	.002
IV: Informal learning						
	Intercept (G00)	-6.206	1.943	-3.194	9	.012
	MeanDLOQ (G01)	.305	.103	2.970	9	.016
	MeanCOTI (G02)	.046	.054	.857	9	.414
	Super (B1)	.054	.227	.237	244	.813
	Race (B2)	.006	.144	.044	244	.966
	Education (B3)	.016	.057	.275	244	.784
	Age (B4)	-.003	.007	-.486	244	.627
	DLOQ (B5)	.054	.020	2.625	244	.010
	COTI (B6)	.052	.023	2.233	244	.026
V: Resistance						
	Intercept (G00)	.890	1.978	.450	9	.663

Factor	Fixed Effect	Coefficient	Standard Error	T-ratio	Approx. d.f.	P
	MeanDLOQ (G01)	-.061	.104	-.582	9	.574
	MeanCOTI (G02)	-.065	.054	-1.210	9	.257
	Super (B1)	.124	.242	.516	244	.606
	Race (B2)	.151	.152	.986	244	.326
	Education (B3)	-.053	.061	-.872	244	.385
	Age (B4)	.021	.007	2.860	244	.005
	DLOQ (B5)	.010	.022	.456	244	.648
	COTI (B6)	-.064	.025	-2.558	244	.011
VI: Discussion						
	Intercept (G00)	.003	2.461	.001	9	.999
	MeanDLOQ (G01)	.013	.133	.101	9	.922
	MeanCOTI (G02)	-.049	.072	-.673	9	.518
	Super (B1)	.474	.224	2.105	244	.036
	Race (B2)	.144	.143	1.006	244	.316
	Education (B3)	.047	.056	.835	244	.405
	Age (B4)	-.006	.007	-.797	244	.427
	DLOQ (B5)	.004	.020	.228	244	.820
	COTI (B6)	-.010	.002	-.450	244	.652
VII: Formal learning						
	Intercept (G00)	2.259	2.787	.811	9	.439
	MeanDLOQ (G01)	-.101	.151	-.671	9	.519
	MeanCOTI (G02)	.010	.084	.114	9	.912
	Super (B1)	-.127	.227	-.563	244	.574
	Race (B2)	-.231	.145	-1.591	244	.113
	Education (B3)	-.084	.057	-1.475	244	.141
	Age (B4)	.002	.007	.273	244	.785
	DLOQ (B5)	.042	.020	2.068	244	.039
	COTI (B6)	.026	.023	1.107	244	.270

I took the significant relationships from each dimension and present “best” equations for each below. Please note that these absolute predictive equations have little value, since the value of each score depends on variables other than the underlying construct. For example, changing the language and tone of items may shift their averages or variation. However, the direction of the relationship is shown by these equations and that should be a constant.

$$\text{Disgruntlement score} = B0 - .526 * \text{Super} - .057 * \text{DLOQ} - .104 * \text{COTI} \quad (3)$$

$$B0 = 3.754 - .240 * \text{MeanCOTI} \quad (4)$$

$$\text{Job - security concerns score} = -.344 * \text{Race} - .051 * \text{DLOQ} \quad (5)$$

$$\text{Accommodation score} = .077 * \text{COTI} \quad (6)$$

$$\text{Informal learning score} = B0 + .054 * \text{DLOQ} + .052 * \text{COTI} \quad (7)$$

$$B0 = -6.206 + .305 * \text{MeanDLOQ} \quad (8)$$

$$\text{Resistance score} = .021 * \text{Age} - .064 * \text{COTI} \quad (9)$$

$$\text{Discussion score} = .474 * \text{Super} \quad (10)$$

$$\text{Formal learning score} = .042 * \text{DLOQ} \quad (11)$$

### Value of Each Predictive Variable

One of the purposes of this study was to understand the predictors of employee response to new technology in a useful way. Let us examine how each of the predictive variables or constructs related to the factors of worker response. The level 1 predictors apply to the individual workers and the level 2 predictors apply to the site or company.

*Super.* From the equations above, it appears that supervisors spend a significantly greater amount of time discussing changes. This finding seems logical. Often, these men or women are more involved than the workers in planning, training, implementing, and troubleshooting problems associated with the change. In addition, supervisors were significantly more disgruntled by the new technology. Again, their associated with planning, troubleshooting, etc. may mean that new technology represents more work and headaches for supervisors than the worker, at least during the initial phases of planning and implementation.

*Race.* Race was a significant predictor for the Job-security score. Apparently, Whites were less threatened by the new technology than African-Americans. This may represent issues of power. Specifically, in the southeastern United States, African-Americans have less seniority in these types of jobs. In this study, Whites had significantly more tenure than African-Americans ( $t=2.121$ ,  $d.f.=258$ ,  $p=.035$ ).

*Education.* Level of education did not show a significant relationship to any of the factors.

*Age.* Age was a predictor only with V: Resistance. Older employees are more resistant to technological change than younger employees. Unlike I: Disgruntlement, which is an affective response, V: Resistance is behavioral. According to Davila, Epstein, and Shelton, (Davila, Tracy, & Simpson, 2000), "when people had experienced success for a long time, there is a tendency to become complacent and resist change." Since age is strongly correlated to tenure in this study, this statement is validated by this study.

*Learning organization.* The DLOQ© score in the level 1 model is taken to be an indication of the individual worker's perception of learning culture. According to this analysis, having a high score on the learning organization construct is associated with higher IV: Informal learning scores and VII: Formal learning scores. This is almost intuitive. Workers perceive a higher learning culture when there is more formal and informal learning. There is an negative relationship between the DLOQ© score and I: Disgruntlement and II: Job-security concerns. Workers are less unhappy about change in an

organization with a strong learning culture. It also apparently helps to reduce the Job-security concerns when new technology is introduced. Perhaps it gives the workers a feeling that they will get training and be able to move to a more skilled position associated with the new technology.

*Attractiveness of the innovation.* The real surprise in this study is the strong impact that the attractiveness of the innovation has on worker response. This analysis reveals a significant positive relationship between scores for the construct COTI and III: Accommodation and IV: Informal learning. More attractive innovations are associated with more informal learning and involvement with the innovation. Presumably, this accommodation and informal learning would contribute to the successful implantation of new technology. Further, there was a significant negative relationship between COTI and I: Disgruntlement and VI: Resistance. More attractive innovations are associated with less negative feelings in employees and these employees are less resistant to the change. These responses probably help the success of the innovation and create a more positive work environment.

*MeanDLOQ.* The average learning culture was a significant predictor for IV: Informal learning scores. This finding is not surprising. It reaffirms the validity of the DLOQ© instrument by supplying two separate (but correlated) measures of learning at the company.

*MeanCOTI.* The average attractiveness is a significant predictor of I: Disgruntlement. As the attractiveness goes up, the employee affective response becomes less negative (more positive?).

### **Implications**

The results support the concept of strong learning environments, even in manufacturing. According to these data, strong learning culture supports learning of new technology and reduces job-security concerns. Based on these findings, it is even more important to keep innovations as “attractive” as possible. This also supports learning related to the innovation. However, it also reduces worker resistance to technology while increasing the employees’ accommodation of the technology.

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# Following the Success: Understanding Labour Market Experiences of Marginalized Youth in Ontario

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**Abstract:** This paper reports on original research interviews with employers and youth in Ontario (n=40) to shed light on successful instances of labour market access for marginalized youth with attention to organizational structures and informal learning.

## Introduction

Although a large body of research addresses youth at risk, high youth unemployment levels, and challenges confronted by social programs designed to address this problem, little is known about employer/employee workplace learning practices that engage youth (who face social and economic barriers) in a way that works for both the young people and their employers. In the absence of established evidence, many employers shy away from 'at risk' youth, although those that do not often, anecdotally, report valuable success stories.

This paper reports on the findings of the Following the Success Project, funded by the Canadian Council on Learning which sought to undertake qualitative research into the conditions under which marginalized youth experience effective access to their first job and career development. Specifically, this project aimed to identify, analyze, and share promising practices that effectively engage youth facing multiple forms of social and economic exclusion in relation to first-time employment and the early phases of career development. The project draws on in-depth interviews with youth employees and employers across the private, public, not-for-profit, and self-employment sectors in Ontario (n=40). The project focuses on the formal and informal workplace learning that take place across processes of employee recruitment, orientation, and ongoing support within organizations.

The project documents the challenges associated with establishing career ladders, HR policy, and educational background as well as the role of various informal learning practices in organizations. Among other things, initial analysis suggests limited proactive mechanisms for employer recruitment of marginalized youth and limited evidence of formal employment policy in organizations related to marginalized youth. Against this backdrop however, the analysis also suggests that success stories appear to be based largely on informal and unspoken policy/practice.

## Overview of Literature on Marginalized Youth and Labour Market Access

A review of research literature on youth transitions to work reveals some important, comparative international findings that inform the Following the Success

Project, particular in terms of establishing the basis for identifying multiple factors and pathways for marginalized youth into first employment. In general terms, the youth population (15-24 years old) in Canada has been growing since the mid-1990s, reaching more than 4.4M in 2005. However, this growth is expected to peak soon, in a manner that can be broken down into two age ranges. According to the Canadian Education Statistics Council (2007), the peak has already occurred for the age range 15-19, at 2.2M people, in 2001, and numbers in that range are expected to decline until at least 2021. The population aged 20 to 24 years old is expected to peak at 2.3M in 2016, when it will begin to drop and stabilize at about 2.1M by 2026. Canada's general unemployment rate (adults and youth) from the mid-1990s to 2006 showed sustained declines and reached a long-term low of 6.3% in 2006 (Akyeampong 2007). Youth unemployment has been consistently higher than the adult rate, but it too declined to 11.6% in 2006. Youth employment, following a decade-long decline, has been rising since 1997 (Usalcas 2005, p.5). Youth employment is mainly full time (77% in 2005). With an aging workforce and slowing growth of the youth cohort, the Conference Board of Canada (2007) projects that while there may currently be an over-supply of workers, the trend is toward shortages: they project a shortfall of 190,000 workers by 2020 rising to 364,000 workers in the Ontario labour market by 2025.

A relatively low unemployment rate overall obscures considerable disparities in detail. To begin with, a variety of social variables shapes the patterns of advance or marginalization through high school and post-secondary education. Several key social variables displayed particularly strong statistical correlation within Hango and de Broucker's (2007) specific pathways model. These included gender, where being female strongly correlated, for example, with the being a 'non-gapper'; aboriginal ancestry, which showed a strong negative correlation with engaging in continuous education transitions toward labour market participation; urban youth, who were much more likely to be "2nd chancers;" and disability, which showed a strong negative correlation with continuous education transitions toward labour market participation.

The focus of this paper, however, is youth transitions. Higher youth unemployment rates have been noted, but these, in turn, are averages which hide substantial social variation. For example, in 2006, the youth unemployment for college graduates was 4%, while for those with less than high school it was 12%; these figures represented a drop from 2002, when they were 5% and 15% respectively. In addition, the profile of youth employment varies by industry sector and is sensitive to economic trends. Youth employment and marginalization also depend on life circumstances more broadly. According to the Canadian Education Statistics Council (2007), in 2004 over a quarter of those youth living in single-parent households (just 7% in two-parent households) were living in poverty and just under half experienced "significant period of low income" at some time between 1999 and 2004. 2001 census data indicated that 57% of young adults (20-24 years old) were living with their parents (an increase by 10% from a decade earlier). Ontario had the lowest proportion in Canada of young people aged 5 to 24 years old who experienced more than a year of low income between 1999 and 2004.



The Youth in Transition Survey (YITS) is arguably Canada's best data source on youth education and employment transitions currently available (see Radner and Sawchuk 2008 for a full review of studies drawing on YITS up to 2008). Hango and de Broucker (2007) provide a breakdown of their ten core pathways by immigrant status (Canadian born or otherwise), but they do not present a detailed analysis of immigrant youth. Gilmore (2008), using data for Canada as a whole (up to 2006), found that for youth (15-24 years old) who were very recent immigrants, unemployment was highest among those of African and Eastern European origin, followed by those youth born in either Latin American, West Central Asian and the Middle Eastern countries. Youth unemployment for very recent immigrants to Canada was lowest for those from Southern Asian countries (see Table 5.1 in Gilmore 2008, p.29). Still, virtually all immigrant youth groups (with the exception of those born in Asian countries) show higher levels of unemployment than Canadian-born youth.

The quality of youth employment is difficult to assess. Initial approximations relating somewhat to this issue of quality of employment based on the YITS data analysis of Hango and de Broucker (2007) show, not surprisingly, that earnings are higher for post-secondary graduates regardless of their pathway to graduation. Where university graduates earned less than high school dropouts (a minority of cases), this was generally explained by lower levels of work experience, a factor that diminished in importance over time. Despite their higher rates of employment, 'gappers' who graduated from some form of post-secondary education did not show higher earning levels at the time of the study. Female youth tended to earn significantly less upon employment, by almost one third. More importantly, overall satisfaction with employment is usually high (e.g., Hango and de Broucker 2007, p.60; see also de Broucker 2005). Overall, in Canada only one in ten youth who were employed were dissatisfied with their job. It is best, however, to interpret such findings in relative terms. For example, dissatisfaction was highest for those who took the following pathways: '2nd chancers' with high school or more, followed by 'non-gappers' who dropped out of post-secondary education, and 'gappers/non-gappers' in the trades or related programs. Those who were the most satisfied with their employment were 'non-gappers' who graduated college, followed closely by 'gappers' who graduated college and then 'non-gappers' who graduate university. High school drop outs, it may be interesting to note, showed significant levels of satisfaction with their employment.

While it is important to know the current distributions of youth across different transitional states (e.g. identifying the '10 pathways') over time and to generate some initial approximations of earnings, quality and satisfaction, what remains absent is a way to understand the different sequences youth experience as they move from transition to transition, especially marginalized youth, who often experience multiple shifts. The YITS represents a powerful data set; it is comparable to the strongest large-scale surveys available, for example, in Europe (e.g., Brzinsky-Fay's use of the 'European Community Household Panel' data set, 2007). However, analyses in Canada or Europe, to date, have not adequately addressed the types of questions raised by our research beyond identification of aggregate patterns and increasingly complex transition 'event sets' or 'sequences' based

strongly on demographic/biographical variables. Furthermore, we note that there is far more attention paid in this research on barriers/failed transitions as opposed to supports/successful transitions for marginalized youth, although some interesting (European) comparative work has offered some useful, although very high-level (i.e., national social policy) modeling of patterns/effects of specific combinations of programs in relation to economic and social conditions in different countries.

The lesson taken from this brief overview is that life-course histories, related in turn to social background, play important mediating roles in youth transition to employment, so that a wide lens on these histories is necessary for both researchers and policy makers. Going deeper, we see that it is relevant to recognize sectoral effects on labour market access for marginalized youth as well. Here we find specific concentrations of employed youth, which raise concerns about pressure on specific sectors which employ youth significantly but which are also severely challenges (e.g., manufacturing) as opposed to retail and hospitality sectors which are the largest employers of youth but which tend to offer relatively limited career trajectories, pay and benefits. Importantly, some literature also evidence youth-specific issues of perceived discrimination, lack of learning opportunities, and other challenges that may affect marginalization.

Our review of general demographic, social and labour market patterns suggests the need for a consideration of broader theoretical perspectives, often implicit, within both research and policy, of the multiple causes, issues and pathways affecting marginalization and successful transition. Literature on a range of competing – and sometimes complementary – perspectives on vocational preparation are evident. Here we understand three dominant perspectives: traditional vocational transition perspectives; new vocationalism transition perspectives; and critical vocationalism transition perspectives. The most promising approaches, with regard to broader theoretical perspectives, entail a framework that incorporates multiple life transitions and takes full account of young people's life stories, experiences, social background and social differences. A general conclusion on the state of the research literature as it relates to Canada and Ontario specifically suggests the following: in terms of organizational practice, research approaches, but in particular public policy-making, there remains a strong bias towards 'supply side' as opposed to 'demand side' intervention; a point emphasized by Marquart (1999) almost a decade ago. Yet 'labour market access' and positive 'career development' are not simply individual accomplishments, they are social accomplishments: collective acts complete with intended and unintended social consequences. Thus, it is necessary, in this context, to track – through effective measuring and feedback systems – the experiences, perceptions and outcomes of youth combined with results, perspectives and practices at the workplace level as well. And, whereas there is a great deal of analytic attention paid to barriers, there is at least as much to be learned from instances of success.

## Findings

In terms of the Following the Success Project's initial findings, the analysis has begun to reveal a variety of relevant information beyond what might be reasonably predicted from the existing research literature. Space prohibits the inclusion of substantial interview excerpts.

Project findings suggest that informal learning amongst both marginalized youth and employers appears to be one of the most important factors in successful integration into a successful career track. Informal learning remains a challenging research variable to explore given that it is typically difficult to recall for interviewees and difficult to conceptualize for many researchers (e.g. Colley, Hodkinson and Malcolm 2003; Sawchuk 2008). Nevertheless, informal learning dynamics are significantly shaped by employer as well as youth orientation to the value of this otherwise taken-for-granted aspect of work life. The interviews indicate where success is the greatest that an awareness of the value of informal learning is the strongest.

The data suggests that informal learning is the prime means by which strong on-the-job performance is developed, important forms of organizational and broader cultural learning take place which, in turn, shape understandings of (employer and employee) expectations, and that informal learning in the workplace is the prime means by which marginalized youth in particular form career development networks in relation to both internal and external labour markets. Initial analysis suggests that rich, inclusive informal learning environments within organizations are characterized by a number of factors: a) an awareness that the development of inclusion which counters potentially exclusionary experiences based on key forms of social differences require informal learning and open forms of participation at work; b) there seems to be little evidence that, at present, explicit/formalized organizational policies are contributing to the generation of rich, inclusive informal learning environments; c) organizations located in small to medium sized communities (which also tend to be small-medium sized organizations) appear to be most effective at generating rich, inclusive informal learning environments. Where larger organizations are considered more carefully (e.g. a large ski resort franchise), the experiences of marginalized youth employees suggest that supervisory culture (not executive managerial, policy or work design) are a focal point in defining success.

Based on employer interviews there are several relevant, initial findings to report. It is important to note, for example, that for employers it is not unusual to see an awareness of the value of informal learning tightly interwoven with understandings of "good management" (owner/manager, roofing company) as well as discussions of the development of a "strong work ethic" (owner/manager, car dealership): these are, above all, learning processes after all. Among the instances of success, we see that even relatively narrow employer understandings of 'marginalization' appear to have powerful, some important positive effects. For example, employers tended to recognize issues of "economic background", "difficulties in school" and in a minority of cases difficulties associated with gendered access to specific occupations (e.g. trade apprenticeship). This is a far cry from

the enormous range of variables cited in research literature that have been demonstrated to weigh heavily on youth employment outcomes: mostly notably with regards to how cultural, first language, visible minority status, Aboriginal status, disability, rural/urban upbringing, parental status, or participation in the criminal justice system bear on marginality. Finally, the findings suggest that there may be a significant 'social pressure effect' that shapes employment relationships in small-medium sized communities: employers interviewed specifically noted both a substantial awareness of youth backgrounds based and a felt commitment to serving the local community by making efforts to serving marginalized youth.

The initial analysis of experiences from marginalized youth interviews in the research suggests no lack of willingness on the part of these youth to participate as fully as is permitted (formally or informally) in organizational life. Unanimously, there is an expressed feeling that they feel "luck that somebody took a chance on me" which underlines an awareness of the barriers that they face while also emphasizing that challenges to success may not strictly or possibly primarily reside in youth themselves (i.e. the 'supply-side') but rather are a function of specific schooling, labour market and organizational environments. This research suggests that common statement in our interviews with marginalized youth that "employers respect where I'm at", may belie some additional, significant complexities as well as potential for positive change vis-à-vis the character of informal learning environments in the workplace. Perhaps one surprising finding that interviews with youth revealed was that co-workers were not seen as a relevant factor in rich, inclusive learning environments: supervisors, managers and, in the case of small firms, owners were thought to be, virtually exclusively, the source of positive, developmental dynamics which raises valuable, new insights on policy support for employer (rather than employee) vocational preparation.

### **Conclusions**

In sum, the Following the Success Project makes extremely limited claims to representative-ness, and yet nevertheless initial analysis suggest a more complex relationship between the existence (or more likely not) of any type of formal organizational policy related to supporting youth in their initial employment experience on the one hand, and the ultimate success in establishing effective work experiences and career pathways on the other, such that formal policy, as understood by employers, may be a less strong predictor success than many (particularly European researchers) may predict.

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## The Shadowy World of Private Tertiary Providers In Canada: Buyer Beware?

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**Abstract:** Private career training or vocational colleges (PVCs) are a significant yet understudied sector of Canada's tertiary education system. This work offers a critical examination of current PVC regulation, and work prospects of PVC graduates. It concludes that further study and policy development is needed to ensure that PVCs serve student interests.

In 2006, the Canadian Television Network's *Whistleblower* series reported that CDI College student Aaron Laforest had successfully sued the US owned private career college franchise for false advertising. Laforest described his courses at CDI, a \$10,000 program of studies funded via Human Resources and Skill Development Canada, as an overpriced correspondence program that did not deliver the quality of education he had been promised (Tomlinson, 2006).

CDI College is one of upwards of 2,500 private career colleges<sup>2</sup> in Canada, some of which receive significant indirect government funding via training initiatives and student loans (Auld 2005; Sweet & Gallagher, 1999). While many of these institutions are reputable, and serve students and the labour market by providing rapid and vocation-specific training, others have baldly misled and exploited students. The sector as a whole has been tainted by well-publicized instances of unexpected overnight closures, accusations of fraud, and cases, like Laforest's above, where students have been misled with regard to what to expect from the colleges and their programs.<sup>3</sup>

This work profiles for-profit providers of adult career education (private vocational colleges, career colleges or PVCs) and examines the current regulatory framework in Canada guiding their conduct. There is a growing interest in ensuring that students are protected in terms of their ability to recoup tuition fees and/or complete programs of study through alternative arrangements when a private training institution fails (New act, 2006). Such regulation, however, should be evaluated within the context of broader social,

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<sup>2</sup> Data source: R.A. Malatest & Associates for HRSDC, 2007.

<sup>3</sup> Recently publicized cases include the closure of Miramichi College in New Brunswick (Quentin Casey, 2008, June 14. Students whose college went kaput will receive help; Scandal Miramichi Career College locked its doors in May, leaving dozens of students floundering. *Telegraph-Journal*, A.2.), and the closure of a BC institution for illegally offering degrees (B.C. Group Calls for Suspension of Lansbridge Operations/Lansbridge sommée de...Anonymous. *CAUT Bulletin*; Nov 2006; 53, 9; pg. A2). In 2007, a Chinese government website cautioned students to carefully scrutinize Canadian institutions (Nicholas Keung, 2007, February 15. Reputation of Canada's private colleges takes a hit; Ontario law aims to repair damage after China warns students about education scams. *Toronto Star*, p. R13). For some additional, recent anecdotes from disgruntled CDI students, see <http://www.techvibes.com/forum/15637-cdi-now-everest-college-newmarket-is-a-scam>.

cultural, and economic factors, which suggest PVC students may be vulnerable in a manner that is not at all addressed by current regulatory initiatives: Namely, even upon completion of a PVC program, resulting credentials, obtained at a private market premium, may turn out to be of unexpectedly low value in the labour market, or recognized much less widely than training institutions claim.

In theory, all tertiary students bear risks in terms of whether time, money and opportunity costs invested in education will yield labour market success. However, for a number of reasons that will be introduced in this paper, risks assumed via private career training are particularly acute. An examination of PVCs also serves to highlight important flaws in Canadian government policy rhetoric that emphasizes individual responsibility for labour market success over warranted, closer scrutiny of complex, structural relationships between education choices, employment outcomes, and the effects of social and cultural capital on both<sup>4</sup>.

My study to date suggests that this area of inquiry is underdeveloped; we have little understanding of either the risks or benefits associated with further education pursued through private vocational colleges. What evidence there is that some may “fall through the cracks” is limited to scattered anecdotes and legal wrangles like Laforest’s suit against CDI College (Tomlinson, 2006). Sweet and Gallagher observed in 1999 that private career colleges had received “limited scholarly and policy attention” (p. 54). More recently, Human Resources and Social Development Canada [HRSDC], in a survey of Canadian career colleges, acknowledged that very little is known about this facet of adult education despite the fact that 10% of Canadian student loan holders attend these institutions (R.A. Malatest & Associates, 2007).

### **Canadian Demand for Tertiary and Continuing Education**

Presently, Canada has one of the highest rates of participation in tertiary education in the world (Association of Universities and Colleges of Canada, 2007). Canada shares with other developed and developing countries an ever-increasing demand for continuing and higher education under the auspices of a broad agenda for “lifelong learning” (Cruikshank, 2002; Kirby, 2007; Livingstone, 2004). Lifelong learning, according to the OECD (2004) describes a distinct policy shift that moves beyond consideration of traditional, linear patterns of formal education to recognize all learning, both formal and informal, from “cradle to grave,” as significant (OECD, 2004, p.1). OECD conceptualization also emphasizes the “centrality of the learner” (p. 2). This is described as a shift in emphasis from a supplier (provider) focus to a demand (consumer) focus, and thus an increased emphasis on institutional responsiveness. However, a learner focus is not simply a matter of institutions better responding to identified learner needs and demands; it must also be understood

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<sup>4</sup> I am using Bourdieu’s definitions of social and cultural capital. See Walpole (2003) for a similar application of the concept to lower SES college students in the United States.

within a larger policy climate context that emphasizes individual *responsibility* for the management of a lifelong career and learning path (Cruikshank, 2002; Field, 2006)<sup>5</sup>.

Such responsibility positions the individual as a consumer of education in an increasingly deregulated and complex *market* for tertiary education (Kirby, 2007). The educational “consumer” must do her homework, in the sense of selecting the institution and program that will best further her life and career prospects (Acumen Research Group, 2008). The need for good information has made third party services for selecting institutions big business in the United States (Brewer, Gates & Goldman, 2002), and similar forces are making their appearance in Canada as its tertiary education system becomes increasingly open and marketized (Davies & Hammack, 2005; Kirby, 2007; Marshall, 2004)<sup>6</sup>. Underlying the provision of such resources and services is a key premise of liberal economics: that the educational “consumer” seeks information with which to make a rational decision. Yet, as Livingstone (1999) suggests, the pursuit of education may tread into territory that appears *irrational*. Citing interviewees from Canadian studies of underemployment, Livingstone observes that

in spite of...a superficial connection between their formal educational attainments and the requirements of their current or recent jobs, both underqualified school dropouts and underemployed university graduates continue to believe and act as if more education is the...solution (1999, p. 123).

The question is whether, in fact education *is* the solution. Livingstone is among critics who question the veracity of human capital theory – roughly, the belief that expanding rates of education reflect an expanding labour market demand for skilled/educated workers. Critics like Livingstone argue that expanding education does not reflect greater needs in the labour market for highly skilled workers, but credential inflation. The consequence is a larger number of more educationally qualified individuals competing for a relatively small pool of quality jobs (Brown, D., 2001; Brown, P., 2006; Livingstone, 1999). If theories postulating an unrealistic faith in education for social and labour market mobility are accurate, it becomes important to inquire more deeply into the criteria and expectations that student bring to their choices about their education.

### **Off the Radar: Canada’s Private Career Training Institutions**

Private vocational colleges (PVCs) form a significant segment of tertiary education, and distinguish themselves from public institutions with the promise of job market readiness, obtained through focused, short-duration learning programs (Auld, 2005; Li, 2006). Auld suggests that these institutions serve an important role by providing “a rapid training response mechanism to help fill labour market shortages” (2005, p. 17). Sweet and Gallagher (1999) observe that, although the institutions are private companies, they take in significant government funding via student loans and contracts to provide job training. R.A.

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<sup>5</sup> See the Canadian federal government’s iteration of this at <http://www.canlearn.ca/eng/index.shtml>

<sup>6</sup> The growing prominence of the Maclean’s survey of Canadian universities is evidence of what Dave Marshall (2004) describes as an erosion of an informal “compact” among Canadian universities to provide degree programs of similar quality and value.



Malatest & Associates (2008) calculated that 13% of students were funded by EI/retraining initiatives, and 9% via non-repayable bursaries or grants. An additional 54% were in receipt of CSLP student loans. Private career colleges have existed in Canada since the late 1800s, but their numbers grew exponentially in the 1980s in response to a federal initiative that shifted funding away from colleges to private training institutions believed to be “more responsive to employer demand” (Sweet & Gallagher, 1999, p. 56).

Career training colleges tend to be small. According to R.A. Malatest & Associates (2007), campuses typically serve about 150 students a year. Many provide training within a single vocational field, like business education, or personal care (Sweet & Gallagher, 1999). Private vocational colleges generally charge higher tuition fees than public universities and colleges (Auld, 2005; Sweet & Gallagher, 1999), and coursework is not transferrable to a university degree program (Auld, 2005).

#### *Who Attends a Private Vocational College?*

Using 2005 data, R.A. Malatest & Associates estimates that 155,000 students are currently attending private career training institutions (2007). A 1993 Statistics Canada study reviewed by Sweet and Gallagher (1999) found that private career college students tended to be mature students. The proportion of older students grew after the late 1980s, when government funding was provided for retraining (Auld, 2005). More women than men attend private career colleges (Li, 2006; R.A. Malatest & Associates, 2008). Li (2006) notes, however, that female attendance has been in decline, and attributes this to lower demand for the secretarial work that was once the mainstay of female attendees.

R.A. Malatest & Associates (2008), emphasize that private career college students are not a uniform cohort; noted “subgroups” of students include immigrants (25%), First Nations (13%), youth coming directly out of secondary education (13%), adults retraining, single parents, and those taking programs for personal interest. The report does not comment specifically on the socioeconomic status of students, but some indicators – including low household income, slightly lower educational attainment rates among parents, low employment, and larger numbers of persons with dependents compared to public college students – suggest that PVC students may be more likely to come from lower socioeconomic backgrounds than students attending public institutions.

Students attending private career colleges pay higher tuitions than those attending public colleges or universities, and to hold larger student loans (Auld, 2005; R.A. Malatest & Associates, 2008), although this premium may appear worthwhile to students who are promised rapid entry into the labour market. Students attending private career colleges are less likely to finance their living expenses through work or savings than traditional college students, hence more likely to finance these expenses with student loans (R.A. Malatest & Associates, 2008).

### *Accreditation and Monitoring of Private Vocational Colleges*

The CICIC (2004) distinguishes between *recognized* institutions, which are authorized to grant credentials via provincial legislation, and *licensed or registered* institutions, which do not fall under this provincial legislation. While some private colleges and universities are *recognized* institutions, most private career and vocational training institutions are not. The colleges may claim to provide credentials, but these should not be understood as synonymous with, or integrated with the credential provided by public institutions.

Students or researchers seeking answers about Canada's private career training institutes and colleges face a complex network of provincial policies, voluntary accreditation boards, and monitoring organizations. There are essentially three forms of regulation for PVCs in Canada: provincial licensure, self-regulation, and less directly but importantly, recognition by the Canada Student Loans program as an eligible institution.

First, all Canadian provinces have regulatory Acts that pertain specifically to career and vocational training other than that provided via public institutions offering recognized accreditation (CICIC, 2004). In many provinces, these Acts are administered directly by a government department overseeing tertiary education and training (CICIC, 2004). British Columbia recently implemented an alternative model, created a separate overseeing organization (Private Career Training Institutions Agency of BC, n.d.). Second, private career colleges in Canada are also self-regulated at federal and provincial levels by voluntary organizations. The most prominent of these in Canada is the National Association for Career Colleges (NACC). Auld notes that this organization has been moving toward higher and more consistent standards among its members (2005). The NACC does not, however, presently have a system of self-regulation or sanctions, and does not publish any research on its membership. The NACC is presently working with HRSDC and R.A. Malatest and Associates on the three part investigation cited in this report (R.A. Malatest & Associates, 2007). A third, indirect means of regulation occurs through Canada's Student Loans Program (CSLP), which maintains a list of institutions whose students are eligible to receive government loans. This effectively decreases the likelihood that students will attend institutions that are not regulated by provincial authorities (HRSDC Canada Student Loan Program, 2007).

### **PVCs: Impacts and Policy Considerations**

The private career training sector should be of interest and concern for at least three reasons. First, as Auld (2005) notes, private colleges depend almost entirely on student tuitions for revenue, rendering them subject to the vagaries of market demand. Second, the private career sector, as discussed, is an important yet poorly tracked and documented facet of continuing education. Both of these concerns are at the root of institutional failures – the sorts of abrupt closures, sometimes tainted by charges of fraud and misconduct – that tend to garner media attention. Such cases can be avoided, and the basic quality and integrity of PCC programming assured, through policy interventions that

regulate the activities of private colleges and protect students in the event that a college fails to deliver promised programs to acceptable standards of quality.

A third concern, however, is more nebulous, and in many ways more troubling than the preceding policy issues; this is the absence of research documenting the eventual success of private college graduates in the labour market (R.A. Malatest & Associates, 2008). The high loan default rate for these graduates relative to the rest of student loan borrowers suggests that graduates either are not obtaining employment, or that employment income is insufficient to service student loan debt. Recent Statistics Canada data suggests that career college graduates are earning only a little more than high school graduates (Li, 2006).

Such outcomes fly in the face of the logic of privatizing the costs of education – namely that the individual should pay for the costs of his or her education because the individual derives the benefit from it. Embedded in this approach is also the assumption that the individual educational consumer can (and should) bear the risks associated with the pursuit of training or education (Cruikshank, 2002). This is the logic proposed by Auld (2005), and it does not differentiate in the degrees of benefit assured relative to associated risks and costs cost, nor the means by which different cohorts use information to calculate these risks and benefits. This point is significant because students from lower socioeconomic backgrounds have been found to hold misperceptions and trepidations about the costs and requirements of post-secondary education.

This raises the possibility that private career colleges attract – at much higher tuition costs than public institutions – precisely those individuals who are least likely to have and use social and cultural capital resources to effectively assess their labour market prospects relative to the cost of their education. That PVC students hold larger loans and default on those loan more often (Li, 2006; R.A. Malatest & Associates, 2008) lends some credence to this argument. Private colleges – and it must be remembered that these are profit-seeking institutions – may thus contribute to the great irony of lifelong learning for knowledge economies: namely that when it comes to higher and continuing education, the rich tend to get richer. Do some PVCs add to the other side of this equation by ultimately compounding the difficulties of the poor? The question is worth asking; despite interest in leveling the playing field for students of lower SES, the tertiary system as a whole persistently reinforces existing inequalities (Acumen Research Group, 2008; Walpole, 2003).

Private vocational institutions should not, perhaps, in this day and age of increasingly aggressive marketing in higher education generally, be singled out for practices that encourage students to expect more leverage in the labour market from their education than is realistic. Livingstone (2004) has argued that underemployment in Canada is an epidemic, and fuelled by claims that “more education and training are the only solution to economic problems...divert[ing] attention from the central problem, lack of decent jobs” (p. 12). Prevailing perceptions of education as a panacea fuel the pursuit of training and credentials among all sectors of tertiary and continuing education. PVCs do

warrant further attention, however, because so little is known about them, and because their profit-seeking has in some cases made their concern for student welfare more suspect than that of public institutions.

### **Issues for Further Research**

Human Resource and Social Development Canada's commissioned study of private vocational colleges and their students (R.A. Malatest & Associates, 2008. 2007) is an important step toward illuminating what Paquette (1988) has called the "shadow system" of private college education (cited in Sweet & Gallagher, 1999) in Canada. The forthcoming final phase of the report series by R.A. Malatest and Associates on labour market outcomes for PVC graduates will provide additional, helpful data. However, broad, descriptive statistics contribute only minimally to our understanding the dynamic relationships between student socioeconomic status, labour market aspirations, factors determining program and institution selection, and eventual labour market outcomes.

Future research might disaggregate the profile offered by R.A. Malatest & Associates (2008), and draw clearer empirical distinctions between sub-groups represented in the profile. Different cohorts among PVC students – First Nations students vs. recent immigrants, or young vs. mature students, for example – likely bring different needs and decision-making criteria to bear on their training and education choices. These differences in turn could inform different policy strategies to target disadvantaged groups, and research on the tertiary education sector as a whole.

Further critical and empirical research might also inquire more deeply into the socioeconomic backgrounds and the career and learning paths of PVC students compared to those who enter public institutions. Studies targeting marginalized populations tend to focus on youth (Walpole, 2003) and emphasize university as the institution of choice (see Acumen Research, 2008). We have little understanding of how socioeconomic status – including the forms of social and cultural capital that accompany it – factor into educational choices impact lifelong learning trajectories. To compare these choices across ages, life stages and SES requires that all sectors, including PVCs, be included in analysis. Private vocational colleges, as Sweet and Gallagher (1999) have proposed, are a significant yet under-researched sector in tertiary education, and must thus be considered in policies that seek to level the educational playing field.

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# Learning the HR Corporate Culture and the Education-Jobs Gap

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**Abstract:** This paper critically examines the link between corporate human resource management and workplace learning – this nexus is more often as not ignored if not assumed in the work and learning and adult education literature.

## Introduction

This paper will not be claiming anything new. The purpose of this discussion is to review our understanding of the knowledge we have. Let's begin with the "education jobs gap" identified by the work of David Livingstone and colleagues (Livingstone, 1999). The message was clear: working people (generally speaking) have considerable knowledge and learning capacity that is untapped in their present occupations. Speaking globally; workers have the knowledge but not the jobs to match their abilities. "Knowledge jobs" within a "Knowledge economy" exist more in the imagination of policy-makers than in real life (Beckstead & Gellatly, 2003). Of course there are some skills-gaps in certain locations and occupations but the "big picture" presented by these policy-makers of an unskilled workforce that needs to be "re-schooled" and "re-tooled" is a myth. David Livingstone's plea for better jobs, for a real empowerment for workers, for real workplace democracy, attracts even less attention than Graham Lowe's calls for a more humanized "quality workplace" (Lowe, 2000).

Why is this? I think part of the answer is the perspectives of governments in these neo-liberal global times and within that perspective the link between corporate human resource management (HRM) and workplace learning. As adult educators and workplace learning scholars many of us are often reluctant to explore these links and contradictions lest it will disrupt research agendas, research funds, or consultancy opportunities. What we have is not so much a new semi-autonomous phenomena of "workplace learning" but a new variant on an old theme of workplace social relations: boss and worker; employer and employee; supervisor and supervised; human resource manager and human resources; workplace coaches or leaders and workplace learners.

## HRM Corporate Culture

The recent development of HRM as a central plank in company policy, designed to give companies the "cutting edge" vis à vis the competition by involving workers more in company activities reveals a much older concern. HRM has always been concerned with maximizing the output from employees, and recent attempts to increase the involvement of workers in some aspects of company decision-making are designed ultimately to maximize company output and profit. Therefore, this application of HRM is essentially consensual in

its method of operation: it assumes that there are common interests between employers and employees (a unitarist view), and denies that sometimes there might be divergent interests (a pluralist view), or that employees in one company might have common interests (some would say “class” interests) with workers in other companies (a conflict view). For some critics, HRM is only necessary because, in an historical sense, labour (human resources) has been separated from owning and controlling the productive process, and therefore needs to be “managed.”

In examining globalization, knowledge work and productivity no one will deny the importance of economic globalization particularly in respect to the freedom for corporations to move around financial capital and locate production facilities worldwide. But the impact of globalization is often overstated as a way of suggesting that global economic forces cannot be contested by national governments or citizens either acting alone or in concert with other nations and peoples. It should also be remembered that Canada has always been a “trading nation” and was developed economically to serve the needs of Britain for furs, wheat, and lumber and today trades most of its exports to the USA with resource and extraction industries still being dominant in that trade.

The “Canadian economy” is a collective term used to describe all economic activity taking place in Canada. It includes all firms and services whether or not they are Canadian owned and controlled (for example, Wal-Mart and McDonalds stores in Canada are included even though they are US owned and controlled), it encompasses publicly provided services, co-operatives, not-for-profit organizations, privately owned family firms and companies and publicly owned (shareholder-owned) corporations. It is misleading to refer to a kind of “Corporate Canada” view of economic activity (encompassing all these diverse organizations and activities) and to suggest that increases in overall Canadian productivity is a key to economic welfare. Some of these companies may be moving resources across borders without fully accounting for them, while others may outsource, no matter what productivity increases are achieved, simply to access cheap labour elsewhere. This outsourcing can include services as well as production and knowledge jobs as well as brawn or sweated labour. Even if there are overall increases in economic wellbeing there is no guarantee such benefits will be equitably distributed.

Note the findings of a 2003 report by Statistics Canada (Beckstead & Gellatly) charting the changes in the Canadian economy acknowledges that less than 20% of the total workforce are employed in “knowledge” occupations – and many of these are “old” rather than “new” knowledge occupations such as physicians, dentists, engineers, lawyers, etc. (2003:35-36). Only 1 in 8 new service jobs outside of the ICT and science areas can be described knowledge jobs (p37). It’s important to acknowledge that all workers have knowledge and apply it at work but also that Statistics Canada is noting something that workers have been reporting on for some time – the opportunities to apply knowledge at work is in decline, “deskilling” rather than “re-skilling” is the norm and workers’ knowledge is underemployed. This underscores Livingstone’s point that while there may be specific skill shortages, generally Canada has a knowledgeable workforce but not the



jobs to match it. A situation mirrored in other Western countries and multiplied ten times over in many developing economies. The cosy HR and workplace learning assumption that most future employment will involve knowledge work is questionable.

Where does all this leave the productivity debate? The importance of labour productivity in growth, competitiveness and trade is often asserted and is closely allied to the workplace learning agenda in the HRM literature but it is very rarely examined. Productivity in different sectors of the economy can vary enormously and as a generalisation the more capital a worker has to work with the more productive she or he will appear to be. As a result manufacturing activity appears to be more productive than most services. If companies maintain technology investments workers productivity can rise; if they run down a plant, move processes overseas and/or close plants, labour productivity falls. There is also the question of the value of the product as measured by the market; an interesting example is provided in Alberta's oil-sands, some of the older technology there uses as much as two units of energy to produce three but that net gain of one unit of energy can be valued highly in the volatile oil and gas market. In addition the huge pieces of capital employed at the oil-sands results in high labour productivity in the production process (not related to 'learning' as such). Sticking with this example it should be noted that most of the environmental and social costs associated with the oil-sands production are not born by the companies – they are “externalities” in economic terms – and they are not accounted for in productivity calculations. Joel Bakan (2004, p70) quotes leading US businessman Robert Monks (a twice-run Republican Senate candidate) “the corporation is an externalizing machine in the same way as a shark is a killing machine” he argues its not “malevolence” but simply what corporations do and is “potentially very, very damaging to society.” Ray Anderson another successful businessman had a similar revelation about how the modern day corporation was an “instrument of destruction” “externaliz(ing) any cost that an unwary or uncaring public will allow it to externalize” (p71). In his case he set about making wholesale changes in the way his company produced carpets: unfortunately his example remains an exception. It's important to note that HR professionals' and corporate trainers' job is to support such harmful externalizing activity and win employee loyalty to corporate goals.

Perhaps why the productivity linked workplace learning argument is so important to HRM writers is because of the central role it gives to HRM via human capital theory. The argument here is that if workers can increase their own human capital via training, workplace learning and, as argued more recently, investments in emotional labour, then productivity can rise. HRM is then key not peripheral, as it once was, in the corporate world. The HRM Director can sit on the top table with the other CEOs! For example the 2007 Conference Board of Canada publication, Learning and development outlook: Are we learning enough? (Hughes & Grant) Argues:

Canada's productivity is lagging behind that of its competitors. One strategy Canadian organizations are using to meet these challenges is the renewal and upgrading of

their workers' skills. By spending on TLD to build workers' skills, organizations seek to create enough additional human capital to make themselves more competitive (p1).

But they also report on low spending rates on training, learning and development (TLD) by Canadian organizations because most companies training needs are modest – which is a reflection of the nature of most work and capital investment in Canada: few skilled workers need apply!

### **Learning Organizational Culture**

Workers have always learned at work; learning at work is not a new phenomena. What they have learned has always been diverse; for example, it ranges from learning about the job and how to do the work to how to relate to fellow workers, supervisors and bosses (the social relations of work) to gaining understandings about the nature of work itself and how work impacts on society (Spencer, 2006).

It is also important to note that workers, generally speaking, have always tried to make meaning out of their work experience. It's difficult for someone to spend 8 hours a day, 5 days a week, doing something in a totally detached way, and even more difficult if a person hates every minute of it. Read any account of workers describing their work and this becomes clear. Workers have always wanted to do a good job, even if that job is menial; the new emphasis on workplace learning should not mask that pre-existing situation. In addition a recent survey of 6 primarily English-speaking countries reported on workers in all countries wanting to have a greater say in company decision making and participatory processes (Freeman et al, 2007)

Workers may learn to accept the dominant ideology that supports management rights; for example, the idea that we are all part of a global economy and must strive to out-compete others in order to survive. (A good example of this workplace learning is provided in the Michael Moore film "Sicko" when he interviews a couple of former US Insurance/Health Maintenance Organization executives who explain how they learned to deal with clients making insurance claims – they basically learned how to undermine these claims and make them ineligible, as one interviewee explained the more they learnt and the more successful they became the more they were rewarded with higher salaries.)

To ignore power and authority at work is to ignore the realities of what it is to be an employee. Organizational culture is that which is determined by management and learning about that culture is learning to accept it. John Storey, a leading business school professor in the UK, has commented that the "management of culture" has become a distinguishing feature of HRM, and dates the "remarkable trend" away from "personnel procedures and rules" to the "management of culture" to the early to mid 1990s (Storey, 2001, p8). He comments that "managing cultural change and moving towards HRM can often appear to coincide and become one and the same project." Corporate cultural management is "perceived to offer the key to unlocking of consensus, flexibility and commitment."

Corporate allegiance to the primacy of shareholder and CEO interests (bolstered by the legal framework, see Bakan, 2004, for a damning condemnation of corporate

behaviour rooted in corporate law and structures), and to the central purpose of increasing profit margins (bolstered by dubious economic theory), relegates the concerns and needs of other so-called “stakeholders” to minority roles. The central contradiction of private enterprise remains: large corporations create hierarchies of control and power and are driven by the profit motive; these control, power and profit relations create the social relations within work and society – those of employer and employee, boss and worker. Society's social classes result from these dominant work relations: it can be argued that with the shrinkage of well-paid manual and office jobs – described as the “middle class” in North America – even in developed economies, society is polarizing into a large working class and relatively small elite. A veil may be drawn over these contradictions at times with the rhetoric of managers as “leaders” and “coaches” and workers as “associates” or “partners” but unless ownership and control changes and becomes genuinely more equitably distributed, nothing fundamentally has changed.

Changes at work are often exaggerated to suggest the move from Taylorism to teams and employee empowerment is more advanced than it actually is. More astute researchers have argued that Taylorist measurement and control at work remains or has been expanded. Taylorism may have changed in form but its essential purpose has not. As Tony Brown comments:

the tendency is in the other direction – to specify every move that a worker makes in much greater detail than before. Management chooses the processes, basic production layout and technologies to be used. Speeding up the pace of work is an intended consequence of standardising production, services or software (Brown, 1999, p15).

All of this is made possible by applying new technology into the “new workplace.” Many jobs can be described as white collar and as linked to new technology; some are being dispersed into the home (teleworkers) and are not required to be completed at a particular “time” or in a specifically designated, employer-owned, “space” – described as “postmodern” and “postindustrial” employment. The appearance of worker control over when and how much work is undertaken is illusionary however, as the new computer-based work comes with constant monitoring and feedback to the employer – far exceeding what Taylor was able to do with his stopwatch and clipboard. What we have today could perhaps be described as a more “differentiated” or “post-modern Taylorism.”

We live in societies (some would argue in one global society) in which the gap between the richest and the poorest, between those who live full lives in the economically developed countries and those who live “half lives at best” in the less developed countries, is growing (Honderich, 2002, p6). Many workers in the developed countries have experienced a decline in the value of real wages, and they must struggle to stay abreast of inflation even at low inflation rates, while the incomes of the rich continue to climb. How important is this inequality? Sam Pizzigati in *Greed and Good* argues its “the root of what ails us as a nation (referring to the USA), a social cancer that coarsens our culture,

endangers our economy, distorts our democracy, even limits our lifespans” (2004, p. vii).  
CEOs:

have never (in practice) really accepted the notion that empowering employees makes enterprises effective. Empowering workers, after all, requires that power be shared, and the powerful, in business as elsewhere, seldom enjoy sharing their power. The powerful enjoy sharing rewards even less. Corporate leaders have never accepted, either in theory or practice, the notion that enterprise effectiveness demands some sort of meaningful reward sharing. (2004, p167).

Another problem in the HRM and much of the mainstream work and learning literature is the tendency to treat all organizations the same, this partly reflects the imposition of business rhetoric on non-business organizations such as public services, universities, hospitals, non-profit and non-governmental organizations, all are seen as dealing with “clients” or “customers” within the context of a “business plan” and having to apply business principles to the “bottom line.” Scant regard is paid to the notion of the “public good” or the quasi-democratic structures that govern these organizations and distinguish them from corporate capital. Given nurturing circumstances and organizational structures these organizations may well be capable of more democratic less hierarchical control involving citizens, workers, their unions and managers. The workplace “democracy” claimed for corporate learning organizations is never compared to the non-profit sector including worker-owned cooperatives with workers participating in major decisions including appointing the CEO and holding him/her accountable to the worker-owners (Salamon, 2003).

### **Conclusions**

Some organizations may well believe that the company’s “competitive advantage” depends on a happy and committed workforce and may work towards that end (full-time employees, higher skills, job flexibility, workplace learning), but others may equally believe that tight control of labour costs combined with close supervision over employees is the road to success (low-paid, part-time employees, routine jobs): both approaches can work “equally well” (Bratton et al., 2004, p.71). It is worth adding that survey material reveals that “empowering” workers does not generally affect the corporate bottom line as imagined by many authors although more say and participation at work can influence employee loyalty (Freeman et al, 2007).

Adult education discussions of workplace learning needs to acknowledge the real issues of equity, power, authority, control, and ownership largely ignored in the HR corporate perspectives and much of the work and learning literature: adult education needs to promote independent workers’ learning opportunities, as envisaged by many early adult educators, in order to advocate for a more real empowerment and a more genuine workplace democracy. It is the jobs and the nature of work that must change if we are to close the education-jobs gap.

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## Building Competency-Based Portfolios for Immigrants

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**Abstract:** Through a portfolio development process, recognition of prior learning allows for the development of applicant or employee ‘profiles’ that can help skilled immigrants to move more quickly towards meaningful employment through successful post-secondary education and training.

The recognition of prior learning (RPL) is practised globally as a means of honouring and building on mature learners’ past experiential learning. Grounded in ancient philosophies, the recognition of prior learning is defined as “the formal acknowledgement of skills, knowledge, and competencies that are gained through work experience, informal training, and life experience” (Vlăsceanu, Grünberg, & Pârlea, 2004). Recognition of prior learning exists around the world in a variety of forms. Some of the names used for describing the recognition of prior learning are: APEL (Accreditation of Prior [and] Experiential Learning), PLA (Prior Learning Assessment), PLAR (Prior Learning Assessment and Recognition), APL (Assessment of Prior Learning), RDA (Reconnaissance des Acquis), or EVC (Erkennen van elders of informeel Verworven Competenties) (Mitchelson & Mandell, 2004).

Utilizing RPL as a part of integrating immigrant professionals is becoming key as the labour shortage in Canada gains momentum. The Canadian Federation of Independent Business (2008) reported that, by the end of 2007, 54.7% of SME owners nation-wide had reported hiring difficulties as one of their top concerns with 3 out of 4 businesses in Alberta (72.5%) reporting hiring difficulties. Immigration is an important part of the solution to this labour problem.

### Issues Facing Immigrant Professionals

*Foreign credential recognition.* The traditional model of recognizing foreign credentials provides accurate and comprehensive information on the comparability of foreign qualifications with Canadian education system, and tends to focus on formal academic training and associated transcripts (ACESC, 2008). Regulatory bodies depend on international qualification assessments that are then matched against the educational prerequisites for licensure by the regulator. In Alberta there are some notable exceptions to this traditional process, including the College and Association of Registered Nurses of Alberta (CARNA) and the Association of Science and Engineering Technology Professionals of Alberta (ASET), both of which use a PLAR process in assessing relevant prior learning and determining further post-secondary upgrading. Duvekot and Konrad (2007) argue that

“the formal procedures of teaching, training and assessment describe only a very limited part of the individual learning potential or competencies. Competencies acquired in informal and non-formal situations are also essential for optimal performance on the labour market or in social functions.”

*Language skills.* One of the major barriers to gainful employment is “insufficient knowledge of official languages” which results in lower earnings and a lower employment rate for newcomers (Statistics Canada, 2008). Although basic language training does address this barrier, “there is a need for language training to higher levels ... in order to help newcomers learn occupation-specific terms to gain employment” (Citizenship and Immigration Canada, 2004). Furthermore, “advanced general English proficiency does not necessarily guarantee professional English proficiency, since professional communication demands and expectations are culturally specific” (EMCN, 2007).

A further complication to successful integration among immigrant professionals is the difficulty with gaining licensure because of a lack of language skills. The Canadian Council of Professional Engineers states: “Without a minimum level of proficiency in English or French, the licensing process becomes very onerous and requires an inordinate amount of time on the part of the international engineering graduate (IEG) and regulatory body staff” (2004). Even if training is found for the IEG so that they can acquire further skills in their field, occupation-specific language skills are the single most common factor for the immigrant professional to be successful in training, gaining employment and obtaining licensure within their profession.

*Access to post-secondary education.* In Canada, non-formal and informal learning acquired through training, workplace offerings, non-accredited institutions, or simply from life’s lessons is generally not recognized for transfer by accredited post-secondary institutions. Immigrants wishing to upgrade their foreign skills or to obtain university degrees necessary for licensing can find themselves repeating previously obtained education due to unrecognized transfer credit or other forms of unrecognized prior learning. Not only can starting over be very expensive, but it can limit the immigrant’s availability to obtain the necessary employment to provide for their family. Taking many years to complete a post-secondary degree can further distance the immigrant professional from recent work in their field, for which they are already at a disadvantage because of the “Canadian experience” requirement by many employers.

### **The Portfolio/PLAR Process**

Each of the issues listed above are being addressed in Alberta through the use of portfolio practices. EMCN is developing programs and services that help to address recognition of prior language learning, the acquisition of language for the workplace, and the recognition of competencies acquired abroad for transfer to the Canadian labour market. Athabasca University recognizes non-formal and informal learning as the basis for its PLAR process.

### *PLAR Practice and Process*

The following is Athabasca University's PLAR model and provides an excellent background on PLAR practice and process. By preparing a portfolio that demonstrates their knowledge through the careful selection, reflection, connection, and projection of learning artefacts, learners can most fully exercise the scope and latitude of their prior knowledge. In so doing, learners' cognitive engagement with their learning histories gives rise to new knowledge – of self, of self situated within the trajectory of growth, and of self situated within the profession. Learners pass through a number of cognitive stages during portfolio preparation. Each step requires intense and laborious thought and may spark the “aha” moment that occasions learning.

*Reflect.* Among adult learners, learning is a voluntary action that centres on things already known. A process of thoughtful reflection is intended to help learners understand experience beyond the isolated, secular level. Helping learners to settle at this level of interpreting their experiences is a process intended to elevate their stories beyond the confines of their own immediacy to more generic levels of knowledge.

*Select.* Adults are celebrated for their rich and varied learning histories and, when preparing a portfolio, must mine their past experiences selectively for the events that can most effectively anchor learning narrative they are creating. Their selections constitute a type of scaffolding upon which they build the stories of their learning. In putting together this framework, they map both their histories and their futures. Selecting experiences and denoting them as valuable labels them as integral pieces in the exercise of building self-knowledge.

*Connect.* The act of connection occurs both subsequent to and concomitant with the act of selection. Once the “knowledge items” have been identified, they must be linked or arranged into an order that serves the purpose at hand. The integral theme of connecting experience to meaning recurs in situated cognition theory (Brown, Collins, & Duguid, 1989) and also in transformation theory (Mezirow, in Welton, 1995). Using the same processes that Mezirow outlines for engendering transformational learning by critically reflecting on and modifying current assumptions and understandings, the PLAR process also asks learners to engage in knowledge-building activity.

*Project.* The last step for PLAR applicants in putting forth the demonstration of their learning is to determine an appropriate presentation method – to project the evidence of their learning in a format deemed acceptable by the receiving institution. In conforming to a structured set of expectations, learners meet another set of learning outcomes by fulfilling process (or generic) outcomes that might be labeled thus: using and constructing documents accurately, communicating appropriately in text, and understanding one's learning style and adapting it to tasks at hand. The foundational importance of this type of learned skill is reflected in the compilation of national-level outcomes for all learners (HRSDC, 2006).



## Practical Applications of PLAR with Immigrant Professionals

### *Engineering Language Portfolio*

Through joint funding from CIC and the Province of Alberta (Enhanced Language Training) EMCN recently undertook a major project to benchmark the language demands of the engineering profession and develop an *Engineering Language Portfolio* (ELP).

The ELP, based in occupation-specific language as well as actual workplace tasks, directly addresses the language barrier for the IEG. The ELP builds off of the European Language Portfolio and the research study *Benchmarking the Language Demands in the Engineering Profession in Alberta* to develop an occupation-specific language portfolio. The ELP has a three part structure:

1. *Language Passport*. This summarizes the owner's linguistic identity by briefly recording second/foreign languages learnt, formal language qualifications achieved, significant experiences of second/foreign language use, and the owner's assessment of his/her current proficiency in the second/foreign language he/she knows.
2. *Language Biography*. This is used to set language learning targets, monitor progress, and record especially important language learning and intercultural experiences.
3. *Dossier*. This contains a selection of work that in the owner's judgment best represents his/her second/foreign language proficiency (Little, 2002).

The tripartite structure of the ELP is designed with a pedagogical and a reporting function (Little, 2002). The reporting function presents additional information about the learner's language experiences and provides evidence of proficiency and achievements (Little, 2002). The pedagogical function promotes pluri-lingualism, raises cultural awareness, makes the language learning process more transparent to the owner, and fosters development of learner autonomy (Little, 2002). The Biography and Dossier merge in the process of the learner's language reflection, and the Passport acts as a measuring stick of the learner's level. The Biography incorporates reflective, intercultural, and CLB "Can-Do" exercises for the learner to better understand and develop their English language skills. The Dossier catalogues and stores the language samples that show how the CLB level, which is recorded in the Passport, was reached.

The ELP is rooted in actual workplace language tasks and is directly related to employment. Little argues that greater flexibility is needed for the design of the biography and dossier in order to accommodate employers (Little, 2002). The Dossier can be used in a job interview in order to showcase the learner's language abilities (Crosbie, 2006). Cummins (2007) mentions that it is important for learners to include information that focuses "on job descriptions for potential employers." As this applies to the dossier section, the learner would include information for the shared dossier that best represents their qualifications for employment. With regards to the transparency of qualifications, Deane (2005) explains that the ELP "can also help to remove some of the major obstacles to

mobility, between levels of education and training, between different learning contexts, between jobs and sectors, and between countries.”

### *Accounting PLAR Tool*

The Accounting PLAR project was funded by HRSDC’s Foreign Credential Recognition program. This project developed a PLAR tool based on an existing tool developed by ASET for EMCN’s ETIP program. The format of this tool is a questionnaire through which respondents self-assess their level of expertise for a variety of occupational competencies and provide documentary artefacts as evidence of their self-assessment. The competencies were taken from the competency maps/frameworks developed by the CMA, CGA and CICA. The developers identified appropriate categories for each competency, removed duplicates, assigned minimum acceptable levels for each competency in accounting designation (consulting with the regulators for this step), identified the core competencies necessary for employment as an accountant in Canada, and developed appendices to be used as a reference for respondents who are unclear on the meaning of a particular competency in the Canadian context.

The Accounting PLAR project aims to seek acceptance from the regulators as an alternate or supplementary method of foreign credential and prior learning recognition. In spite of the general support that the regulators (in particular CMA and CGA in BC and Alberta) have had for this project, it seems premature to expect that they will quickly abandon their traditional methods. There is precedent for this, as described earlier, in the relationship between CARNA and Mount Royal College to provide PLAR-based competency assessment as a key part of the regulatory process for immigrant nurses. So it is not unreasonable to believe that an established PLAR for accountants would gain the credibility necessary to convince the accounting regulators to implement it into their own licensing process.

In the meantime, however, it is important to utilize the PLAR in a way that immediately benefits respondents. An important outcome of the PLAR process is a better understanding on the part of the respondent of their skills and abilities; therefore, a portfolio course integrated into the existing Accountants Bridging Program could be an effective use of the PLAR. Funding is currently being sought that will allow EMCN to develop an accounting-specific portfolio course module based on the competencies outlined in the PLAR. This will be done in collaboration with the PLA Centre in Halifax based on their existing Portfolio Development Program curriculum.

### *Athabasca University*

Athabasca University (AU) is Canada’s leading distance-education and online university. In its mandate and vision statement, AU outlines its commitment to reducing the barriers to achieving a university education. Following on this, it adopts as a key pillar in its foundation a process of recognizing learners’ prior experiential learning. To implement a coherent and integrated prior learning recognition policy, AU maintains a

central office where personnel champion, direct, and manage the PLAR process. The existence of such an internal and integrated structure makes Athabasca University somewhat unique among Canadian universities. The size of its operation places it at the forefront of university prior learning practice in Canada.

At AU, teams of content experts assume responsibility for assessing learners' knowledge and determining its relevance to their current programs of study. Assessors look for the connections that learners have created between their past experiential learning and its application to current learning. They are looking for the insights, revealed in learners' narrative writing, that speak to learners' thoughtful awareness of the importance of their learning in their lives. In addition to providing a quantitative score that is dependent on learners' adequate addressing of sets of criteria, assessors are also asked to respond qualitatively to the learner's portfolio presentation. What is missing? What strengths are displayed? How can a learner best complete his or her program in order to utilize past learning while at the same time remedying any perceived gaps in required knowledge?

The heart of the knowledge construction exercise, in this text-based portfolio method, rests in the process of writing learning statements. Learning statements form the body of evidence of the learning that applicants claim to have acquired. It is here that learners' levels of competencies are demonstrated. The process of writing learning statements presents a vigorous cognitive challenge to most learners and PLAR applicants struggle with this task. Learners are provided with tools to assist in this difficult process – guidelines, templates, examples, and instructions. Those responsible for PLAR at Athabasca University provide coaching and mentoring for learners at all stages of portfolio development, but most of the assistance is required for the writing of learning statements. A transcript of past formal learning and documents outlining the learner's program progress assists assessors in understanding where and how the learner's learning fits into the program of study.

### **Conclusion**

Immigration is a fundamental component of Canadian life that will maintain its significance as the current labour shortage worsens. Finding ways to smooth the transition for immigrant professionals is vital for their successful settlement and integration. The Edmonton Mennonite Centre for Newcomers and Athabasca University are taking strides to meet the key needs of immigrants through portfolio based approaches to foreign credential recognition, language skills acquisition, and post-secondary education and training.

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# Making High School Training Programs Work: Stakeholders' Roles in Community Organizations

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**Abstract:** We examine partnership activities and principal stakeholder roles in two western Canadian community organizations. These groups promote various activities including apprenticeship programs that help youth transition to the workforce.

## Introduction

Two western Canadian high school training programs are helping youth transition to the construction field by introducing them to skilled trade apprenticeships and related work experiences. These programs are promoted through their respective community organizations – groups of interested partners. One community organization is located in northern Alberta in the Fort McMurray and Wood Buffalo region and the second one is in the Peace River North and Peace River South regions of northern British Columbia. In this paper, we examine stakeholder relationships in these community groups as they negotiate partnerships within the boundaries of high school training programs. By means of our conversations with the interview participants, individuals' articulate their experiences and perceptions about the roles of unions, employers, governments, and schools for youth training that introduce them to the paid workforce.

We present background information about the two community organizations, their high school apprenticeship training programs, and the local and regional labour markets. We then outline our conceptual influences. Following this section, we briefly describe our research methods and interview participants, and then draw on our research findings to examine stakeholders' roles in community organizations.

## Background

In this section, we provide a brief overview of two community organizations, one in northern Alberta and the other in northern British Columbia and their high school apprenticeship training programs. We also introduce the provincial apprenticeship systems and labour market contexts, which provide the impetus for the conception and continuation of these VET programs.

### *The Alberta Case*

The community organization that has taken on the responsibility to coordinate school to work programs for high school youth in the northern Alberta community of Fort McMurray and the Wood Buffalo region is managed by a Board of Directors.

Representatives of the Board are from school districts, community groups, industry, government, post-secondary institutions, and Aboriginal organizations. One aspect of their partnership work involves apprenticeships.

Alberta's apprenticeship system is governed by the provincial government's Apprenticeship and Industry Training (AIT) Board. AIT oversees the apprenticeship system whereby they establish policy, distribute funding, and manage 50 designated skilled trades according to their respective government-sanctioned regulations. Provincial Apprenticeship Committees (PACs) and Local Apprenticeship Committees (LACs) present industry's recommendations to AIT, which significantly influence the apprenticeship system (Izen, 2007). To augment the adult apprenticeship system, a high school training program, the Registered Apprenticeship Program (RAP), was implemented in the 1990s.

RAP is a pathway to help youth meet their high school diploma requirements, aid youths' transition to the workforce, and encourage youth to obtain skills to advance their employment opportunities. In addition, through RAP, young people's exposure to the apprenticeable trades has the potential to increase the number of individuals willing to take on skilled trade careers, which will ideally help Alberta's economy (Alberta Learning, 2003). This notion is important because in recent years there has been an acute shortage of skilled people who have broad-based apprenticeship skills, particularly in construction-related trades. In the current Alberta labour context, youth are an additional source of labour. In June 2008, the youth unemployment rate for individuals aged 15 to 24 years in Alberta was 5.7% and in May the rate was 8.3%, in comparison to 2.2% for adults 25 years and older (Alberta Employment and Immigration, 2008).

RAP allows a high school student, who is interested in an Alberta apprenticeable trade, the opportunity to earn credits (up to 40) towards his/her diploma (100 credits for graduation) while at the same time receive wages and gain apprenticeship hours (Apprenticeship and Industry Training, 2007). Although in the past, the articulation between technical training and RAP has not been promoted, Alberta Education is currently launching policy to offer students credentialed pathways through the secondary education Career and Technology Studies (CTS) program of studies. This pathway makes it possible for students to obtain first-period technical training qualifications in addition to earning RAP apprenticeship hours (Alberta Education, n.d.).

### *The British Columbia Case*

In the Peace River North and Peace River South regions of northern British Columbia, a community organization has developed a consortium to help high school youth transition to the workforce. Governance for this consortium is managed through a community learning council. Council members represent school districts, industry, community, Aboriginal associations, and post-secondary institutions. Although this community organization promotes numerous programs, some that do not involve formal apprenticeships, many students enter the apprenticeship system to help them explore career opportunities in the construction trades.

The governing body for British Columbia's apprenticeship system is the Industry Training Authority (ITA) Board, which is accountable to the Minister of Economic Development. ITA, similar to Alberta's AIT, implements policy, manages the apprenticeship process, and directs funding. Influential recommendations are presented to ITA by Industry training organizations (ITOs) (Izen, 2007). Throughout the past decade, BC's apprenticeship process has undergone several changes. Ninety-one government-recognized industry training programs with on-the-job work experiences and in-school training requirements are now available to interested individuals. To receive recognition for this training, attestations are required from employers to confirm that the apprentices have achieved satisfactory levels of competency (ITA, 2007).

High school students have two primary pathways to access the apprenticeable trades in British Columbia: Secondary School Apprenticeship (SSA) and Accelerated Credit Enrolment in Industry Training (ACE IT). SSAs offer students opportunities to gain work experience in industry training programs, earn credits (up to 16) towards their high school diplomas (80 credits required for graduation), acquire hours for their apprenticeships, and receive an income. ACE IT, which can be taken at the same time as a SSA, makes it possible for students to earn high school credits, and obtain their first-year technical apprenticeship training or enrol in a foundation program that align with the apprenticeship programs. It is also possible, contingent upon a student's program, for a youth to acquire his/her second and third-year technical training qualifications. Depending on the school districts' policies, students also secure high school credits and/or post-secondary credits (ITA, 2006).

Similar to the labour market situation in Alberta, British Columbia's employers, government, and construction associations are seeking ways to increase the skilled labour workforce. Unemployment rates for youth 15 to 24 years of age indicate that they are an available source of labour. In May, 2008, the unemployment rate for youth was 8.8%. For comparison purposes, the adult (25 years and older) unemployment rate was 3.6% (Service Canada, 2008). The SSA and ACE IT programs are two viable pathways for employers to help youth access career opportunities.

### **Conceptual Influences**

The notion of social partnerships for VET is gaining popularity in Canada, particularly from a provincial policy perspective. We draw on Billett, Ovens, Clemons, and Seddon's (2007) definition of social partnerships: "[L]ocalised networks that connect some combination of local community groups, education and training providers, industry and government to work on local issues and community-building activities" (p. 638). Several provinces, for example, Alberta, British Columbia, and Ontario, have established educational policies to encourage social partnerships with a variety of stakeholders (e.g., employers, coordinating organizations, and secondary and post-secondary institutions). Some policies, for example, sanction high school apprenticeship training as a means to help students transition to the workforce and advance students' employability skills. One potential outcome for these high school training programs is to provide the labour market

with entry-level skilled employees. However, these VET programs operate within a decentralized market thus there are differing levels of involvement from provincial governments (Taylor, 2007). Lack of government involvement may hinder program implementation because school districts may not have the necessary resources to offer high school apprenticeship programs. Additionally, in Canada, there is little federal collaboration despite a growing economy that requires skilled labour.

The degree of stakeholder participation in high school training programs is highly dependent upon local economies and labour supply. In a study that compares the general VET systems of five countries (i.e., Canada, USA, Denmark, Germany, and Korea), Bosch and Charest (2008) maintain that liberal market economies such as Canada and the USA have weak vocational training programs in contrast to the coordinated market economies of Denmark and Germany and a government-led VET system such as Korea. The complexity that comes with market economies is compounded by differing requirements of local employers, who, depending on their products and/or services, continually adjust their workforce to meet to regional, provincial, national, and global markets. Various authors (e.g., Rikowski, 2001; Keep, 2005; Ryan, Gospel, & Lewis, 2007) have written about industry involvement and the need for labour market regulations and incentives to make VET programs viable options for employer and other stakeholder participation. These elements are also used as the benchmark to measure the success of secondary VET programs because without employer support, the viability of high school training programs is questionable. On the other hand, Unwin (2004), in her examination of VET policy and employer participation, or lack thereof, argues that the myopic view of policy-makers to “create the necessary incentives and penalties to force employers to take VET seriously” (p. 147) limits possibilities. Rather, an approach that is not solely dependent on employers and encompasses a broader view of vocational training and skill attainment as beneficial to society should be considered. Even though employers are valuable stakeholders in secondary VET programs, it will become clear in the sections that follow, the two community organizations have taken up Unwin’s challenge to try to develop partnerships for youth transition programs that encompass a broader societal view. Albeit, this goal is difficult to achieve given the integral role that employers play in youth school to work programs. The acquisition of quality VET skills and knowledge and the desire to make high school programs work for youth and for society, is the responsibility of individuals, communities, and industry.

### **Making High School Training Programs Work**

Before a discussion about stakeholders’ roles can take place, it is crucial to identify the key partners in two community organizations who have come together to promote high school apprenticeship programs. Partners in these community groups, according to our research participants, are: employers, governments, Aboriginal organizations, trade associations, secondary and post-secondary institutions, and, to a lesser degree, unions. In 2007 and 2008, we conducted 30 interviews and focus groups with 36 individuals involved



in community organizations who have an interest in promoting high school training programs, specifically, British Columbia's SAS and ACE-IT programs and Alberta's RAP. The interview participants are Aboriginal and Trade Council representatives (N=4), government officials (N=3), employer representatives (N=10), college and school personnel (N=11), community organization representatives (N=4), and union members (N=4). Building on the previous sections, we draw on the interview data and scholarly literature to investigate how partners of two community groups negotiate their roles, which, in turn, has formed the basis of successful secondary VET programs.

Both the Alberta and British Columbia community organizations began with significant funding support from influential regional employers mainly because there were immediate and predicted requirements for skilled trade labour. Kitagawa (2002) details, in a report prepared for the Conference Board of Canada, that Canadian youth are "an underemployed and untapped resource" (p. i) and documents how the Canadian education system tends to focus on academic success instead of developing links with employers and the regional and local labour markets. In contrast to Kitagawa's findings, these northern industry partners recognized they needed more skilled labour and youth were an underutilized labour source. A school coordinator contents that "I think that's a great part of our success, is the support of our industry people in this town. We've had them on board from the beginning with the steering committee and just asking, 'What do you want? What can we do?'"

From a pragmatic perspective, the means to initiate and sustain VET programs are contingent upon national and regional labour market forces and it is the institutions that control these elements (Stuart & Cooney, 2008). Nonetheless, seed funding, as indicated by a community organization chair, allowed their group to "hire people that could help us or provide relief for others that could actually go through and do articulation agreements and actually see what was required in programs.....That gave us a really good boost." Due to the continuing need for skilled labour in western Canada, provincial governments recognize that financial support for these programs is important: "[O]ur funding of the youth initiative...is directly aimed at helping to alleviate some of the skill shortages" (Government representative). The downside of implementing programs during a booming economy is highlighted by an employer. He hopes that the youth training programs continue even "if the economy slows down. We need to make sure that we always recognize this line between demand and supply." Bosch and Charest (2008) add that stakeholder involvement "reflects the interests and strengths of the various actors...VET systems are far more sensitive to changes in product and labour markets and to the strength and relations of unions and employers' organisations than general education systems" (p. 430).

Despite the initial reliance on industry stakeholders, the upside of group development is articulated by a community organization chair: "[I]t brought people together, and all of a sudden we were starting to talk the same language...and we couldn't have done that without the existence of [community group]." A community group representative further states: "[W]e're not like one little person saying geez it's a really

good program and I've got really good kids...it gives us some muscle behind us....it's really good to have an umbrella group behind us setting things up and then we walk in."

All the participants note the important role of high schools in youth apprenticeship programs. A government representative explains: "We are the funders, and they [high schools] are the champions." This belief is upheld by a community organization chair since high schools are "where the rubber hits the pavement." Likewise, school districts' roles are "to make sure that students realize what opportunities there are here for training and work in this region" (School district coordinator). At the post-secondary level, partnering with colleges for one community organization has made a positive difference for their youth programs: "The college was really good at setting up and adjusting their timetable, their traditional schedule to match ours....They were the first ones in the province that did that, and I think, from my recollection, they've received quite a bit of flak from other colleges" (Community organization chair).

The preceding comments outline the partners who are activity involved with these community organizations; however, "[t]here has been very little union involvement, to my knowledge" (School district coordinator). A community organization representative also states: "Some of the unions actually, right in their guidelines...state that they won't take first year apprentices at all. And so they're struggling because they recognize the value of the program." Another community group representative is of the opinion that union involvement is "more of an information relationship so that they can understand what our program is, that this is the workforce of the future."

There is evidence that the two community organizations have made inroads to develop partnerships that take in the broader societal view. Partners demonstrate that they believe, similar to Unwin (2004), building VET skills and knowledge will contribute to their communities. According to a school district coordinator, "the idea is if these kids are trained here, they'll get work here and they'll stay here....[if] We send away for training; we probably won't see them again. So stay in the north, train in the north."

### **Conclusion**

Billett, et al. (2007) observe that social partnerships are intended "to understand and address local and regional concerns and for building social capital" (p. 637). British Columbia's and Alberta's community organizations reflect this view. There is a clear notion that to make high school training programs work for youth, "there definitely has to be people that are visionary...and to work together to make it happen...it's the maintaining the relationships with the partners...and not losing sight of what we're here for, which is the student, and in the end it's the whole region that benefits" (School district coordinator).

### **Acknowledgements**

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## Impacts and Strategies for Full-Time Workers in Canadian Part-Time Graduate Education Studies

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**Abstract:** This comparative pilot study contrasts midlife literature with narratives of part time master's degree graduates. A narrative text analysis identified areas of similarities and differences between these literatures. Results are discussed with attention to future research.

### Background

The explosion of the baby-boomer generation in Canada born between 1946 and 1965 has changed all levels of the educational system in Canada. This started with changes in elementary and secondary school systems and continues to change universities today. In fact, many of these baby-boomer adults are now considering a return to graduate education to pursue master's degrees but are doing so in very different ways than they did in their undergraduate years. To respond to these changes universities are creating multiple types of master's degrees to address the 'new' adult learner. This is also consistent with similar trends found in higher education in the United States (Conrad, Haworth & Millar, 1993). Both female and male 'baby-boomer' workers in the prime of their lives are exploring this option in response to meeting the range of personal, work and career objectives in their lives.

Employed adults are of special interest to tertiary institutions for many reasons. As the economic climate becomes increasingly short of experienced workers due to semi- and full-retirements, employers find the use of tuition plans to cover university costs for employees is one way of retaining midlife adults in the current job market. The caveat is, however, that these adults are required to maintain their employment throughout their studies. Thus, graduate programs offered through evening classes, online or through a combination of short-term face-to-face and online delivery systems have become increasingly attractive to both employers and employees.

One of the challenges facing learners, employers, higher education administrators, and programs is the gap which exists between the characteristics and life circumstances of working adults and the ways universities are responding to the multiple needs of the "new" adult employee. For employees, blending work with education while remaining true to family and community is a complex and complicated set of needs and obligations. While educational pre-requisites may be of central concern to universities, employees may have a different set of constraints that determine whether one is successful or not in a decision to return for master's degree studies.

To learn more about the role of graduate education in business, a review of business literature was completed in 2006 but offered limited evidence of the gains that

organizations may have seen from graduates who had completed their studies. Less was available on the tangible effects that graduates had on organizations. A second literature search was undertaken in 2007 that focused on working midlife adults to see what could be learned about this developmental life phase. Brim (1993) described midlife as the “last uncharted territory of the life course” (p.3) and, although significant development has occurred, there remains much to do. The result of this search indicated there was evidence on the personal, work, community and educational aspects of midlife development, but there were few references explaining how learning was actualized in midlife. Those that did describe details about the processes, factors, and strategies of part-time working adult learners in midlife were few and far between.

With this background, the present pilot study was undertaken to examine what, if any, insights might be drawn from midlife learners who had completed graduate education. Five published narratives were gathered from part-time, working employees who were writing from the perspective of former midlife learners in graduate education programs across Canada. The purpose of the study was to explore how these narratives might support or negate the dimensions identified in the midlife literature.

### **Method**

The preliminary document analysis pilot study examined five published narratives of working adults (Francis-Poscente, 2008, Rodgers, 2008; Burns, 2008; Mahoney-Slaughter, 2008, Leach, 2008). Each had completed a master’s graduate education degree on a part-time basis prior to 2006 while being employed. All were graduates from Canadian universities located in either Nova Scotia or Alberta. A qualitative narrative research approach was chosen and each narrative was analyzed through a thematic review which included reading for content followed by re-readings for coding and verification. Categories were created reflecting the four dimensions summarized below.

- a) Personal dimension which represented a period of transition, change and transformation but might be uniquely expressed by midlife learners.
- b) Work dimension which represented various job and career issues but might be uniquely expressed by midlife learners.
- c) Community dimension which represented the informal support structures but might be uniquely expressed by the community of midlife learners.
- d) Educational dimension which represented educational pursuits but might be uniquely expressed by midlife learners.

The quotations then were sorted into four tables representing each of the dimensions listed above. These quotations were assembled and themes were identified.

### **Results**

The results produced quotations that responded to the four dimensions revealed in the literature review on midlife (Willment, 2008). Given the narratives were drawn from five midlife adults this was not a surprising finding. The issue that did arise was that fact

that these and other dimensions were identified in the context of midlife adults pursuing part-time graduate degrees while continuing as contract or full-time employees within midcareer standing. This finding suggests that literatures on career development rather than business literature per se may be more appropriate for further study.

### *Midlife Literature*

The results will be presented visually during the conference presentation but the results are summarized below for the four dimensions taken from the literature.

*Personal dimension.* The results of the study provide useful insights about working adults who return part-time for graduate work. For example, the personal dimensions tended to be consistent with the midlife literature. Several sub-themes were identified. These included: a sense of self as one planned their course offerings; a trust in one's decision to pursue graduate school at this time of life; a belief that challenges could somehow be met with planning; and, a sense that one was making the right decision by enrolling in part-time graduate work while at the same time accommodating family obligations.

*Educational dimension.* This focused more specifically on sense of self as learners: discussed returning to graduate school with family, peers and employers; ensured personal needs would be met before financial costs were committed; had a sense that academic growth would thrive in a master's program; and, realized that intimidation would eventually give way to success. These were educational dimensions expressed personally and were in addition to the multitude of accommodations required to manage learning in midlife with new delivery and related processes.

*Work dimension.* Again, this was supported by extensive discussion of sense of self by articulating issues of knowledge transfer to the workplace. The support from employers was also noted. Opportunities to take academic concepts learned from school and apply them to work was an area of considerable discussion.

*Community dimension.* This was also extremely important as they relied on a sense of self with others as a guiding path. This was noted in the way they continually engaged with others, used their support with each other and were quick to see themselves as a distinctive community of learners. This dimension was especially strong in these midlife learners.

### *Other Results*

There were also quotations identified that indicated further considerations might be important. These may be unique to this particular set of narratives but specific observations are noted below.

*Identity evolution.* While this was not frequently discussed directly in the narratives, these graduates found that graduate education provided them with more than just new content and a master's degree. It provided a way to be challenged and to respond by growing, developing and forming a deeper sense of self in a way which was unique and

personalized. The meaning of self appeared to be much clearer and a sense of grounding or psychological comfort was represented in these graduates. This is usually not readily identifiable for novices to graduate work. Perhaps it is the experience of going through a deep process which makes this so personal and complex. For each graduate, the situation was different, unique and challenging.

The life circumstances which exist when a learner is placed into a multiplicity of identity-related roles as learner, employee, manager of others, mom, sister, aunt, daughter, friend, mentor and many others is complex, dynamic and difficult. Nevertheless it was strengthening and a way to “polish [one’s] identity” as expressed very clearly in one narrative. .

*Motivation and risk-taking.* The narratives also revealed a sense of personal motivation and risk-taking taken by these learners. Many times throughout the narratives a goal was identified but circumstances arose that delayed or presented a barrier to reaching that goal. Risk-taking and the willingness to allow one’s vulnerability to show often enabled the capacity to try something new. For these adults, this often was the major step forward in their learning. While the goal is clear (i.e., to graduate), the process was often cloudy and unknown and risk was ever present for these midlife learners. They risked their time, money, employer’s belief in them, pride, self-esteem, confidence and support the day they decided to pursue and complete graduate studies. It was unclear whether this risk-taking was a factor that graduate learners were aware of in their graduate lives.

*Coping and adaptation.* The skills and strategies practised by students in the undergraduate years pale in comparison to those required in graduate schools today across North America. This is especially true for these midlife workers who became learners through distance education. From watching and teaching graduate students for over fifteen years, it often seems to me that while they are afloat they reach for lifelines as they learn the tricks of the educational trade. There was frequent evidence of this in the narratives’ periods of crisis followed by the introduction of coping mechanisms with new adaptations. This is an arena for further development to provide deeper understanding about the midlife, employed graduate learner experience.

## **Discussion**

The pilot study did demonstrate similarities with the midlife literature. The narratives provided specific examples of the way in which these dimensions are realized in the context of a midlife worker, employed in an organization but completing part-time graduate studies. As well, the recognition of midlife learner identity, motivation, risk-taking, coping and adaptation issues suggests further study is needed on these frontiers.

This pilot study also revealed that these five learners were engaged in an academic culture quite separate from a culture of employment. They lived in both cultures at the same time, and faced regular tensions and issues not shared by most midlife adults. Their stories reveal a continual sorting and shifting into and out of the distinct and separate academic and workplace worlds: midlife employee by day, midlife learner by night. While

living this dual life, issues of stress, overwhelming workloads, and illness were evident as we reviewed these narratives. There is a down-side to employees who are expected not to falter in their responsibilities at work, in school and in life. This is a serious issue and deserves much more time and study. Until there is a greater emphasis in Canada for these two cultures to actively co-exist and co-operate, working learners will continue to face problems arising from this unstated but serious situation.

### Conclusions

This pilot project was insightful as it provided an opportunity to examine midlife literature within the applied context of midlife learners. From this study findings suggest several areas that would offer new research directions in future. For example, more study of the relationship between school and workplace in midlife as well as mechanisms for the mutual support of learners, schools and workplaces needs to occur. Further work might be developed into how learning transpires in these circumstances to inform the development of new directions and opportunities.

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# Reflections of Indian Teacher Education Program (ITEP) Graduates: Beginning Teachers' Experiences of the Transition from University to Teaching in Band Controlled Environments

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**Abstract:** The author identifies some of the challenges faced by beginning Aboriginal teachers teaching in band controlled environments. This paper addresses issues of teacher preparation, transition to teaching, and how Canadian universities might enhance and expand programs of Aboriginal teacher education.

In the early 1970s, as a part of a larger national and international trend among Indigenous peoples, Aboriginal groups within Saskatchewan began to assert their rights to control their own education. The band controlled school system was established both to improve educational attainment among Aboriginal peoples and to serve as vehicles for the revitalization and transmission of languages, cultures, and world-views of Aboriginal groups in the Province (National Indian Brotherhood, 1972). The Indian Teacher Education Program was established in response to the demand for qualified Aboriginal educators and to date, has prepared over 1000 graduates who now form the backbone of teaching and administrative staff of the band controlled school system in Saskatchewan and beyond. Despite its longevity and influence, little academic research has been conducted to date on ITEP or the experiences or accomplishments of its graduates (Legare, 2007). For the past two years, four researchers have been working together on a federally funded<sup>7</sup> project that is exploring the experiences of 30 beginning First Nations teachers who graduated from ITEP at the University of Saskatchewan (U of S) within the past two years.

## Significance

The reality of current demographic patterns in Canadian schools means that there is a compelling need for higher education, including teacher education, to become better informed about the concerns and responsive to the needs of Aboriginal peoples. "There is a significant change that is taking place in many parts of Canada with respect to the growth in school-aged children of Aboriginal ancestry. For example in the Province of Saskatchewan, it is estimated that by 2016, Aboriginal people will represent 46.4% of the population" (Tymchak, 2001). There is also a growing universal demand for well-prepared professionals more generally (Cochran-Smith, 2003; Cross, Israelit, Cross, Israelit, 2000; Ralph, Walker, & Wimmer, 2007). Society and communities delegate to those responsible for professional education the task of preparing its teachers, doctors, lawyers, etc., and the

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<sup>7</sup> We acknowledge the research funding support from the Social Sciences and Humanities Research Council of Canada

status and responsibility of today's professionals is acquiring an increased sense of importance and urgency (Aguayo, 2004; Cochran-Smith & Zeichner, 2005; Ziv, 2002). This imperative is particularly evident in the preparation of Indigenous teachers or in the preparation of non-Indigenous teachers who may be teaching an ever-increasing diverse Aboriginal population (Herbert, 2003; Heimbecker, Minner & Prater, 2000; Hill, 1998).

## **Results**

The teachers spoke very positively about their experiences in ITEP. Many identified the cohort dimension as being most important in that it provided a critical mass of Aboriginal students to create a degree of safety and security, akin to a sense of family in "learning with your own people". Others mentioned that the small class size and the close personal relationships with ITEP staff provided academic and personal support which was critical to success. Many mentioned that the overall environment of ITEP was culturally affirming and helped the beginning teachers to be more confident in asserting their presence and feeling proud of their culture within the larger campus environment. Many identified their peer relationships and the friendships that developed as an important supportive legacy for their beginning teaching careers.

### *Preparedness*

In general, the teachers felt that ITEP prepared them well for the academic aspects of teaching but most said that they experienced difficulties in adjusting to the day to day realities of teaching in band schools. Virtually all of the teachers felt that teaching on-reserve presents unique challenges stemming from a pervasive culture of poverty, educational disadvantage and scarcity of resources, the complex dynamics of small, close knit communities, and the pressures of working in an educational environment which is often highly politicized, where teachers and administrators rarely enjoy stability or security. Consequently high teacher turnover is common. Many of the teachers expressed concern about the volume of extra-curricular activities that was expected of them both in the school and the community. A striking comment made by more than one of the participants was that "teachers are expected to be slaves to the community". Another participant said more bluntly that "If you work in a band school you are paid less to do more". Yet despite these challenges and frustration, all of the teachers expressed high levels of job satisfaction, felt that teaching was the right career choice for them, and took great satisfaction from contributing to the development of the youth in their community or in First Nation communities generally. Either directly or indirectly, many of these teachers expressed a belief that teaching in a band school was part of a larger project of decolonization for Aboriginal peoples.

There were many valuable more specific comments in the area of teacher preparation which came forward from our conversations with the teachers. Their suggestions and concerns were expressed in the following ways. While most of the beginning teachers said that they felt well prepared in the areas of lesson and unit planning

they could not say the same about preparedness in creating yearly plans. In this part of the conversation, we noted that in most cases, these beginning teachers were being asked to provide more evidence of planning to their school administrators than is the case for other beginning teachers we have worked with in provincial school systems.

Many of the beginning teachers stated that a disproportionately high number of students in band schools experience learning difficulties. Many of the teachers felt that they should have been better prepared to work with students with special learning needs, teaching to multiple grade levels, and in adapting the curriculum to meet the needs of all learners. Assessing and evaluating student learning was identified as a major challenge for many of these teachers given the wide range of skill levels in a given classroom and the prevalence of “social passing”. While ITEP did provide some preparation in the area of student assessment, many of these teachers felt that more by way of assessment would be beneficial to them in their beginning years of teaching. In particular, many teachers said they were ill prepared in how to work with learners who are functioning well below the grade level they are in. In addition, given the high number of students designated as “special needs”, many of the teachers have teaching assistants available to them. However, most felt unprepared to work with other adults in the classroom. They also acknowledged the complexity of working with teaching assistants who were both parents of the children they taught and also members of the community where they worked and lived.

More specific to individual courses, the teachers indicated that coursework in educational administration, law, and ethics could have been made more relative to the reserve school system and that these courses did not prepare teachers well enough for dealing with the complexity of professional and ethical issues they encounter both in schools and in the community. Some of the teachers commented that their beginning teacher education could be expanded to better prepare them to teach in secondary education and in Cree Language instruction.

### *Field Experiences*

All of the teachers recognized the valuable experience of the internship but most indicated that there should be more opportunities for “hands on” experiences in schools. The term “hands on” was used consistently by the participants. Some teachers said that, in addition to assigned placements, there should be more opportunities to visit a wider variety of schools throughout the program and these could include schools in urban, rural, and band controlled settings. While there was general agreement that there should be early student teaching experiences, the comments specific to the current two week placements were mixed. Some teachers indicated that there was too much emphasis on observation in these experiences and that they wanted more hands on time with students, teachers, and teaching assistants. Some of the more practical aspects of teaching which some teachers felt they could be better prepared include: how to set up a classroom, how to find resources, how to maintain the student register, how to do report cards, how to communicate with parents and resolve conflict, and how to maintain an effective learning

environment. Again, while observation may assist in coming to terms with these tasks, the teachers indicated that “hands on” time would offer a more valuable learning experience. Moreover, given what is expected from today’s beginning teachers, there was some suggestion that the expectations for the internship and student teaching experiences should be made higher than currently is the case.

### *Supportive Collegial Relationships/Mentorship*

The teachers talked a lot about how they would like to have more supportive relationships from other teachers and school administrators, especially in times of need or when the decision is made to transfer to another school. Nearly all of them wished there was more mentoring available to them, particularly from more senior teachers. Some of the conversations we had made mention of a desire for a more formalized mentorship program for teachers of Aboriginal students. We also learned that there is much interest in becoming a part of the provincial teachers’ association, where currently, teachers who are employed in band controlled schools are not a part of the Saskatchewan Teachers’ Federation. Many of the teachers believe that support from school administration and leadership is key to their success as beginning teachers. Some of the teachers indicated this was lacking in their situation and they described their first years as “sink or swim”.

### *Community/Parent Relationships*

Many of the teachers involved in our study spoke about the complexity and challenge of dealing with members of the community and parents. While this is a part of the dynamics of many beginnings teachers’ workplace, band schools have a unique dynamic given most First Nation communities are small and close knit. Many teachers bring “relationship baggage” from communities into their workplace. The teachers we worked with recommended that ITEP give much more attention to helping teachers deal with these conflicts and improve the overall professionalism of band schools. In many cases they wished for more parental involvement in schools. In cases of conflict with parents, many of the teachers indicated that they wished they were better prepared to deal with these issues as they arose.

We regard the level of expectations for beginning teachers in band controlled schools as being very high. On the one hand, many of beginning teachers said this “felt good”. On the other hand, this level of expectation increased work loads, particularly extra curricular activities that were expected of them both in the school and in the community.

While the beginning teachers were aware of Professional Codes of Conduct expected of teachers, they indicated that too often, these expectations were lacking in the community and even from other teachers in the school. Many of the teachers we spoke with felt ill prepared in how to deal with ethical and professional issues with parents and the community. Finally, many of the teachers indicated that teaching assistants and substitute teachers, who are usually also community members and the parents of children they taught, are frequently not adequately prepared to take on their roles. This presents a

challenge in terms of how they, as teaching professionals, relate to other staff in the schools.

## Discussion

### *Moving Forward From our Work*

Stan and Peggy Wilson's work (1998; 2002) has been helpful to us in terms of how we approach this study and how we understand what we've learned. Their work also guides us in how we share what we've learned and how we move ahead. In doing so, we are committed to a thoughtful, respectful, and cautious approach. Central to this is our sensitivity to what we've learned from our participants and how we talk about what we've learned. Here, the Wilsons remind us that "In addition to being related in a kinship manner to all living organisms, there is the added dimension of respect for and taking care of 'all our relations' (p. 157). They go on to say that "Every individual is therefore responsible for his or her own actions, but not in isolation" (p. 157). What then, does this suggest in terms of how we move forward?

We honour what our knowledge holders have given us. We also are cognizant of the complex contexts in which they work and live. We are sensitive to what they have given us and how we use that knowledge to make our current programs better in preparing future teachers. We have also committed to the Elder and communities where we worked that we would use what we learned to inform the policies and practices of the U of S and how it administers Aboriginal teacher education. We have intentionally reported our results in a general way, opting not to include many of the very rich personal quotes made by our teachers. In Western qualitative research methodology, we would say that adding such quotes from individuals and including more of their personal stories would add depth and richness to how we report our work. However, in doing so, we would run the risk of identifying our participants and making them even more vulnerable as beginning teachers and community members. As teacher educators we need not only report what we've learned but also to take responsibility for taking this knowledge and incorporating it into our practise so that our programs provide better learning experiences for future beginning Aboriginal teachers and ultimately teacher education more generally.

### *Cohorts*

Delores van der Wey (2007) eloquently addresses the value, challenges, and issues associated with building cohorts of First Nations learners in higher education. Our work extends her notions to the undergraduate education. From our conversations with beginning teachers, there were comments about the profound differences between university learning experiences when the students were in classes with only ITEP students and in those where there were few if any other Aboriginal learners. Frequently, the former experiences were much more positive than the latter. We further learned there is a need for more preparation for secondary education and more in-depth study of subject matter usually offered outside of colleges and faculties of Education. In large universities such as

the U of S and especially in introductory science classes and some areas of study in the humanities, such classes are typically very large and students do not get to know and support one another. The reality in many of these classes is often contradictory to what we learned from our teachers and from the literature where competition and individualism are more common than the acceptance of cohorts. Moreover, van der Wey (2007) cites St. Denis (2004) to explain that “Culture has come to replace the term race and this acknowledgment in itself supports the argument that there is not social equality between cultures, that, for example, Indigenous cultures are positioned on a lower rung in society, at least as the dominant society perceives Indigenous peoples” (p.1000). Although called places of *higher education*, many university classrooms are a microcosm of the reality articulated by St. Denis. Here, van der Wey writes “It is also important to avoid making assumptions that individuals in university classrooms and other gathering places necessarily feel safe enough, or confident enough in who they are, to be open about sharing aspects of identity” (p. 1000). How then, does teacher and higher education respond to expanding programs to meet the needs of beginning Aboriginal teachers where resources do not enable Aboriginal teacher education programs to offer courses outside of the existing programs?

We also learned the teachers experienced what could be a sense of loss of collegial support as they left the ITEP cohorts for their new lives as beginning teachers. There is a need for more support for beginning Aboriginal teachers and a need for more intentional forms of mentorship during the beginning years of teaching. We note here this is not unlike what we know about mainstream teacher education. However, given the complexity of these teachers’ workplaces, the need is greater. We know from our work in mainstream teacher education that there are calls for an ongoing role for teacher educators and universities in the mentorship and support of beginning teachers. Might this idea be applied to places of Aboriginal teacher education? Given the Wilson and Wilson’s notion of “Relational Accountability” how might a process of community education and engagement and an ongoing role for postsecondary education be enacted and facilitated?

### *Field Experience*

In a “nutshell” we learned that our beginning teachers would like to have more opportunities for field experience in their beginning teacher education. While not specific to Aboriginal teacher education, from the literature we know that student teaching is a critical aspect of pre-service teacher education (O’Brien & Elcess, 2005; Zeichner, 2002). Wilson (1999) referred to field experience as the core feature of teacher education. The foundational premise upon which all of these practice-based programs are based is that authentic and deep learning occurs when the learner applies relevant knowledge and skills to solve real-life problems encountered by actual practitioners in the field (Renzulli, Gentry, & Reis, 2004; Wilkerson & Gijsselaers, 1996). In addition, there is evidence that the nature of teacher education, itself, is changing in the context of what Darling-Hammond (1999) and others such as Goodlad (1994) have termed a *changing world*. Our work calls

for more opportunities for teacher candidates to have “hands on” experiences with children, other teachers, and teaching assistants in a variety of setting both on and off reserve.

### *Teacher Preparation*

There is a great deal of what we’ve learned from our teachers that we can immediately implement into the current practice of ITEP instructors. We take responsibility for doing this. However, other things we’ve learned from this study are broader and far more complex. In her article entitled *There Is No Way to Prepare for This*, Helen Harper (2000) addresses some of these major challenges. While we are aware that her work is focussed on the experiences of Aboriginal and non-Aboriginal women teachers teaching in northern Ontario, we find that much of her work resonates with what we’ve learned. Harper speaks to the complex relationships of teachers to the school and community. She writes about teachers’ “difficulty in defining or negotiating their relationship to the community and grounds of engagement with the community on educational matters among other things is in need of further discussion and clarification” (p. 149). Like our study, her work found “first-year teachers seemed unprepared for such discussions” (p. 149).

Despite these challenges, we wish to return to what we presented first in this paper where our teachers told us how well ITEP did in preparing them for their beginning years as teachers. This is observed by other scholars in the area of beginning teachers in First Nations communities. Duquette (2000) describes Aboriginal teacher education in northern Saskatchewan as “successful in developing graduates who are role models for their community and who are proud of their culture and their ability to infuse it into the curriculum. These programs are seen as a means of building the capacity to achieve Native control over education”(p. 135). On this positive note, I d here with some concluding remarks

### **Conclusion**

I close here by stating heartfelt thanks to the beginning teachers who participated in our study. We wish them well in the amazing work they do. We offer our appreciation for the guidance and support we have received from our Elder and from the communities. We continue to be guided by their desire to make the world a better place for all children. Finally, we need to thank the staff in the ITEP office for their continued support and interest in our work.

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## Bilateral Federalism and Workforce Development Policy in Canada

*Donna Wood, University of Edinburgh*

*Thomas Klassen, York University*

**Abstract:** Since 1996, many responsibilities in workforce development have been devolved from federal to provincial governments through new bilateral agreements. This presentation focuses on the impact of these changes on intergovernmental institutions and processes in Canada.

Workforce development policy is central in a globalized economy, and in the past decade federal and provincial governments in Canada have sought to make major modifications in the governance of this policy domain. This paper analyses the extent to which recent shifts in federal-provincial arrangements in workforce development represent a distinctive approach to social policy governance in Canada, and also assesses the capacity of the existing intergovernmental institutions and processes to support the development of pan-Canadian policies. Governance shifts have been accomplished primarily through devolution from the federal government to the provinces (including the transfer of federal staff) via a variety of bilateral agreements. These shifts have not been accompanied by complementary changes to the fragmented multilateral intergovernmental institutions and processes in place to manage workforce development policy on a pan-Canadian basis. It is concluded that without a more robust intergovernmental process to bridge between the two orders of government—one that also provides space for other actors to provide input—workforce development policy in Canada will remain inadequate.

## **Engaging Directly With Sectors of the Workforce: What Universities Can and Should Do**

*Fay Fletcher, Janice Bell, Gordon Gow, Russ Pierozinski & Walter Archer  
University of Alberta, Edmonton, AB*

Over the past two decades scholars such as Ernest Boyer and organizations such as the Kellogg Commission on the Future of State and Land Grant Universities have called for universities to “return to their roots” by engaging directly with their surrounding communities. The response to this rallying call has been the development of both “engaged scholarship” and a new “scholarship of engagement” at many universities, including the University of Alberta. The practice of engaging directly with community partners from various sectors of the economy, in contrast to the “disinterested scholarly research” that universities are justifiably known for and proud of, is characteristic of some professional faculties, but particularly of university extension units. It is, in fact, written into the Academic Plan of the Faculty of Extension at the University of Alberta. This panel will look at how the engaged scholarship of the Faculty of Extension is directed toward facilitating learning in the voluntary, public, and private sectors of the surrounding communities.

### *Voluntary Sector*

Fay Fletcher and community partner Janice Bell, Director of Volunteer Edmonton, will discuss a project designed to 1) provide informal learning opportunities for new immigrants to learn about Canadian culture and gain experience in Canadian workplaces and 2) provide opportunities for the non-profit sector to prepare for placing and hosting immigrant volunteers. Alberta’s booming economy and the need to immediately place newcomers into paid employment have proved to be a challenge.

### *Public Sector*

Gordon Gow has been involved in a collaborative initiative with the Alberta Provincial Government and others on communication technology and public safety. In April 2008, he worked closely with Alberta Emergency Management Agency, CKUA, and the federal government to plan and host a roundtable on the future of the Alberta Public Warning System. The initiative highlights the important role of the university in shaping policy and planning for public safety. The experience also suggests some important insights concerning the challenges of a scholarship of engagement.

### *Private/Public Sector*

Walter Archer, with community partner Russ Pierozinski (also an instructor and Associate Chair at the Northern Alberta Institute of Technology (NAIT)), will discuss one example of how the Professional Programs unit in the Faculty works directly with partners in the private sector to promote workforce related learning in that sector as well as with

other institutions in the public sector. The Certificate in Adult and Continuing Education (CACE) was developed and is frequently updated in partnership with many partners in the private and public sectors. This program is unusual in that it involves a partnership with continuing education units at three other universities in western Canada, as well as a mutually advantageous relationship with other institutions in the public sector such as NAIT.

## Challenging Transitions in Learning and Work

**Abstract:** This session includes five contributors to a manuscript based primarily (although not exclusively) on work undertaken as part of “The Changing Nature of Work and Lifelong Learning in the New Economy: National and Case Study Perspectives”, a research network ([www.wallnetwork.ca](http://www.wallnetwork.ca)) supported by the Social Sciences and Humanities Research Council of Canada from 2003 to 2007.

### Summary

This paper begins with a critical reflection on conventional notions of major transition points through the life course in the institutional context of advanced capitalist societies. The empirical analysis presents profiles of the learning practices of Canadian adults based on a country-wide survey conducted in 2004 (see [www.wallnetwork.ca](http://www.wallnetwork.ca)). The survey provides information about the formal and informal learning activities of adults over 18. Participation patterns are analyzed for five-year age cohorts from 18 to over 80, as well as for those in different occupational class locations (large/small employers, self-employed, professional employees, managers, supervisors, service workers, industrial workers). The interplay of age and class is also considered. Basic findings include a delayed decline with aging of participation in formal adult education courses, and even more sustained informal learning throughout the life course. Class differences in formal educational participation are significant but are diminishing with rapid increases in both school attainments and adult course participation in younger cohorts. Few significant class differences in informal learning are found through the life course. Most of those of all ages and in all class locations in the employed labour force are engaged in forms of continual learning. The myths that older people or working class people are less active learners should be buried.

We can safely conclude the following:

- the most evident formal types of learning diminish in old age, but informal parts of the “iceberg” of learning persist throughout the life course;
- older people tend to be wiser than younger people in the “required curriculum” of life and have less related need for formal instruction. Elders in every society are capable of providing vital mentoring instruction to younger people;
- it is evident that participation in schooling and formal adult education courses has grown rapidly in recent decades. There is mounting evidence that these increases are in excess of formal job requirements and that the “overqualification/underemployment/ underutilization/overeducation” of the entire labour force in advanced market economies is also growing significantly. If the unrecognized and underutilized informal learning of many people is also considered, the waste of talent is massive;
- according to the current survey, over a quarter of all employees believe they are overqualified for their jobs. This includes over 40 percent of those ages 18 to 24. But

even among those in their 50s, a quarter feel the same way. Underemployment is now a sustained problem that cannot be resolved by the maturation of workers through their employment careers;

- it is increasingly evident that further educational reforms—inherently valuable as education generally is—will be of little immediate use in addressing the education-jobs gap. More equitable distribution of paid work, design of more decent jobs allowing more workers to utilize their current capacities, and greater valuing of now unpaid work-- including creation of green jobs and mentoring by retired people-- are surely part of the resolution of this growing gap.

### **Occupational Transitions within Workplaces Undergoing Change: A Case from the Public Sector**

*Peter Sawchuk*

*OISE/University of Toronto, Toronto, ON*

While it is increasingly recognized that learning and transitions do not stop once people gain entry into the labour market, this chapter orients to the transitions that continue to occur within occupational and organizational life. The addition of research on this dimension is essential for putting flesh on the argument, common in the literature today, that learning/work transitions are non-linear, variegated, and deeply interwoven with the nature of work and economy. Indeed, neither vocational, education-to-work, nor career transitions research has adequately developed detailed empirical assessments of what can be called *intra-institutional* instances of transitions which shape the nature of *inter-institutional* (e.g. from school-to-work, and back) transitions over the life-course. And in an era in which organizational restructuring is increasingly the norm, virtually no research has sought to illuminate the multiple layers of transitions that take place within workplaces as individuals, work processes, technologies and, in the case of the research reported in this chapter, whole occupational categories undergo change.

My argument is that workers undertake extended and differentiated career transitions in the course of training and particularly on-the-job informal learning, and that these localized transitions play a significant role in understanding learning/work transitions as a whole. My argument draws on an analysis of changes that have occurred in public sector welfare benefits delivery work in Ontario (Canada) since 2002, and how different aspects of these changes can be understood in terms of learning-work transitions. The changes that commenced in 2002 were part of a large-scale work process and technological initiative that changed the nature of welfare work in this province undertaken by an aggressive conservative government seeking to find cost-savings. The research is based on 75 in depth interviews across three, representative regional office clusters as well as a province-wide survey of workers experiences (n=336). I focus on the occupational/organizational learning-work transitions with special attention to the distinct experiences and patterns of learning of veteran and new benefits workers. In both cases,

we see learning-work transitions shaped by the negotiation of treacherous waters of both a new job for some, and new learning for all affecting over 7,000 workers (and over 650,000 welfare recipients).

What emerges in the analysis is the inseparability of learning and work relations for attempts to understand the fullness of occupation transitions. Specifically, I show that amidst the occupational/organizational change process we see how veteran workers coped with the transitions. There are significant period-based cohort effects which have shaped, through public and local operational employment policies who was hired and why. Older workers, for example, entered this welfare work occupation in an era in which 'home visits' and genuine 'people-based' social work dimensions of the job were central; an era in which work was managed by more experienced welfare benefits social workers who moved into supervisory roles and who could speak from experience on how to actually do the work effectively. We see this changed significantly in Ontario today. We also see that veteran workers struggle to reconcile the transitions that now shape their occupation; a situation, as we'll see, in which extensive occupational knowledge of the past becomes a burden to dealing with the present and future. Informal learning is crucial to understanding these struggles. The unique features of this learning-work transition come most clearly into view when compared to the experiences of newcomers to the occupation. Lacking the lived experience of a people-oriented form of welfare social work, newcomers carried few if any of these burdens of institutional memory. However, informal learning networks are not always equally available to the newcomers.

### **Leaving University without Graduating: Evidence from Canada's Youth in Transitions Survey**

*Wolfgang Lehmann & Eric Tenkorang  
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As increasingly high levels of post-secondary education are seen as essential for occupational and life course success, it becomes important to investigate the educational outcomes of groups that have been traditionally excluded from higher education. In Canada, we continue to witness a persistent relationship between socio-economic status (SES) and access to university. Yet, we have also seen a remarkable increase in educational aspirations and university enrollment across social strata. Little, however, is known about how SES affects individuals' university experiences and chances to persist and graduate. This paper is based on an analysis of Cycle One of the older (18-20 year) cohort of Statistic Canada's Youth in Transition Survey (YITS).

Although there is solid and persistent evidence that parents' level of education remains the most reliable predictor for their offspring's educational attainment, we find that SES, measured by parental educational attainment, has no significant effects on university attrition when used in logistic regression models. This research thus supports



other Canadian quantitative studies that have found no immediate statistical relationship between socio-economic background and dropping out of university. This may well suggest that the relationship between socio-economic status and educational attainment is formed in primary and secondary education and, quite likely, in the transition from high school to post-secondary education or employment. The findings may further indicate that the educational attitudes, aspirations, and aptitudes of lower SES students who enter university may be closer to those of their middle-class than their working-class peers.

Nonetheless, the findings in this study may still be interpreted from a perspective of socio-economic advantages and disadvantages. The bivariate analysis did indeed show a direct relationship between parental educational attainment and university dropout, as well as between being a first-generation student and becoming socially integrated at university. For instance, first generation students exhibit lower levels of academic and social integration and are more likely to work long hours off campus while attending university, all of which do have significant effects on university attrition.

These findings from the bivariate analysis correspond to other studies in Canada and abroad that have documented how low socio-economic background can force students into the role of cultural outsiders, whose decision to leave university can be explained as the result of an alienation from the norms and culture of university, which they experienced as incompatible with their social backgrounds.

Contrary to the commonly-held belief that overly instrumental attitudes toward university has negative implications for students social and academic integration, this study also suggests that first-generation students who enter university with relatively clear and ambitious career goals that require a university education may actually be able to draw on such an instrumental attitude for success at university.

In conclusion, we suggest that future waves of YITS data will provide larger data sets from which to investigate the relationship between parental level of education, university attrition, its reasons and timing, and its consequence for future occupational and educational pathways.

### **Evolving Constraints and Life 'Choices': Understanding Pathways of Students in First Nations Communities**

*Alison Taylor & Evelyn Steinhauer  
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This paper examines the institutional and personal factors that influence the career pathways of Aboriginal youth living on a reserve in Alberta, Canada. The youth in our study participated in a provincial summer work experience program that was designed to interest high school students in health careers. This internship aimed to attract young people to a sector with reported skills "shortages" and to help smooth their transition to work by making career pathways more transparent. The internship program also made the





