

THE WORK & LEARNING NETWORK

For Research and Policy



CONFERENCE PROCEEDINGS 2003

Poster | Roundtables | Symposium

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POSTERS

Information Technology Skills: Enabling the Transition to Work for Arts Students

Terry Butler, *University of Alberta, Edmonton*
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Abstract: Do liberal arts students lack the information technology (IT) skills they need when they enter the world of work? The Technology Edge project surveyed students about their computing skills, and spoke with employers their expectations of Arts graduates. We report that there is no “digital divide” between art and non-arts students, although there are skill areas in which arts students need improvement.

Poster Description

There has been widespread recognition recently that arts students are highly valued as employees, but there is also a public perception that arts students may not be well equipped to face the challenges of employment in the information age. Have arts students fallen behind with respect to their IT skills? How does the issue of IT skills affect students’ employability? How can IT competency be integrated into the liberal arts education? The *Technology Edge Project*, established at the University of Alberta, addresses the issue of students’ learning of IT in academic environments and applies a discipline-centered approach to integrate IT into liberal arts courses.

With the funding support from the Office of Learning Technologies, Human Resources and Development Canada and the Faculty of Arts at the University of Alberta, the Technology Edge Project was launched in 2001 to address the issue of liberal arts students’ IT competency. A needs assessment, including a student survey and employer focus groups, was conducted at the University of Alberta, the University of British Columbia, and the University of New Brunswick.

Thus far, the needs assessment has drawn a comprehensive picture of students’ current IT skill levels and attitudes. Four IT skills (basic computer use, e-mail, word processing, and Internet) emerged as the core competency every student possessed. As well, arts students have an overall positive attitude to using IT both in the work force and in academia, especially when these skills are in their own specialized area. However, arts students are less proficient, and less confident in their abilities, in areas such as presentation, spreadsheet and database programs. On the other side of the job market equation, employers uniformly expect basic IT competency and articulated this requirement with an emphasis on the standard business suite of software, which includes word processing, spreadsheet, presentation and database skills. They stressed the importance of life-long and continuous learning of IT skills. Both students and employers strongly prefer to see IT skill acquisition integrated into the academic curriculum. Based on the assessment results, the project team is currently developing Tech Edge learning materials and approaches to integrate IT into the liberal arts curriculum. Three academic courses have been selected for the pilot phase: specifically, an Art History course, a History course,

and a French Language course. The courses are redesigned to incorporate learning activities that require students to use information technology. Students' learning is to be supported by tutorials in self-study or workshop mode. In other words, students will learn IT skills in the context of an academic discipline and in the process of completing course assignments. The pilot implementation will be evaluated to determine the effectiveness of the Tech Edge learning materials and the discipline-centered approach. The ultimate goal of the Tech Edge project is to provide liberal arts students with the necessary skills to effectively use information technologies in their chosen field of employment. They will be able to critically evaluate and creatively incorporate appropriate technology tools into their working environment.

Learning Conversations in the Workplace

Cheryl Zurawski, University of Calgary, Alberta

Abstract: A qualitative and exploratory study reinforces the role of conversation in organizational learning. Characteristics of effective and ineffective workplace learning conversations and best practices are also revealed.

Poster Description

New features on the face of work and learning can be shaped in conversation. While conversations do take place when people meet formally or participate in formal learning situations such as in a classroom, many more conversations *do* take place when people interact day-to-day on-the-job and in informal learning situations.

Much has been written about organizational communication and organizational learning, but connections between the two processes have received much less attention. This poster highlights findings of a qualitative and exploratory study designed to gain an understanding of:

- the relationship between conversations employees and managers have at work and the way they learn from each other,
- the experiences of employees and managers with learning conversations;
- characteristics of effective and ineffective learning conversations, and
- best practices for learning in the workplace through conversation.

Five literature perspectives informed the study, namely: adult learning, leadership, organizational learning, manager-employee communication and workplace learning conversations. The study setting was a financial co-operative headquartered on the Canadian prairies. Data was gathered through one-on-one critical incident interviews with six participants.

Three levels of data analysis were conducted. The first level was to extract significant data bits from transcripts of the interviews. The second level was to assign key phrases to the data bits by open coding. The third level was a thematic analysis to tease out similarities and differences from the employee data, manager data and common elements within and across the data sets.

Findings shed light on the role of workplace learning conversations from manager and employee perspectives, and what each staff group perceives is needed to ensure the performance of these roles

contributes to workplace learning. The notion of a conversational learning partnership, through which both employees and managers actively and openly engage in workplace conversation for learning purposes, emerges as a concept of interest to scholars, practitioners and organizations alike.

ROUNDTABLES

Senior Students, New Graduates & Experienced Professionals Perceptions of Opportunities in the Workplace

R. Campbell, H.M. Madill, M.A. Armour, D.Cullen, I. Meglis, T.C. Montgomerie, S. Varnhagen, A. Einsiedel, L. Stewin, C. Rothwell, & W. Coffin
Women in Scholarship, Engineering, Science and Technology (WISEST)
University of Alberta, Edmonton

Abstract: Factors derived from recent research on career decision-making and retention of women in science, engineering, and technology fields are explored.

Round Table Outline

Some of today's fastest growing career opportunities are in science, engineering and technology (SET); areas where the ratio of males to females has not changed appreciably over the last decade (Statistics Canada, 2003). *Women's perspectives on their opportunities in the new economy*, a research project supported by a SSHRC/INE Development Grant, is designed to explore women's career decision-making, and the strategies and skills they perceive are necessary to thrive, in SET fields.

During qualitative interviews and focus groups with 49 senior undergraduates, 17 new graduates, and 21 experienced professionals, factors that lead to choosing and staying in a SET career were explored. In particular, the skills and strategies learnt through work, school and non-work experiences and the resources (including people, information, and program of study) that the women had used were probed. This information was then prioritized through nominal group processing exercises with representative members of each constituent group. These priorities have been incorporated into three versions of a career commitment framework (corresponding to each of the groups: senior students, new graduates, experienced professionals) that attempts to explain the relationship between factors that impact career decision-making.

Using the identified priorities for guidance, we propose developing a resource network that will share information about strategies, skills, aspirations, barriers, and experiences of success among women in SET fields at all career stages. This web-based, computer-mediated, network will provide a forum for learning and sharing the experiential knowledge of others. Learning will be enabled through static resources (web links, career profiles) and interactive sources (message board, live chat, video conferencing). All participants, regardless of career stage, will be encouraged to post questions and responses to promote the lifelong learning.

To maximize the resource network's effectiveness and efficiency, our next step will examine the

commonalities and differences between the three versions of the project framework. Are the strategies senior students plan to use similar to those that experienced professionals have found most beneficial? Or are there other strategies and skills that the experienced professionals could share with newer colleagues that might lead to increased retention of women, thus greater diversity, within SET fields? In this roundtable, similarities and differences between the groups' priorities will be discussed and the opinions/experiences of roundtable participants sought.

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Working Against the Grain: Exploring Work as 'Not-Labour-Power'

Jane Dawson

St. Francis Xavier University

Round Table Outline

The purpose of this session is to outline a research project-in-process that examines the meaning of work decoupled from the capitalist ideology of work as labour market participation. A central focus of the research is on how people experience and negotiate the contradictions between the 'labour-power' and 'not-labour-power' dimensions of their working lives (Rikowski, 2002). There are important implications, in this analysis, for challenging the reduction of education into a form of production, oriented primarily towards the manufacture of "this strange, living commodity -- labour power" (p. 2).

The focus of the proposed research is on four alternative understandings of what counts as 'work' when labour market participation is taken from centre stage. They are: , which is awkward, but provides a way of thinking about the meaning of work for people who are 65 and older, and officially positioned outside the labour market frame. Each poses a unique challenge to the idea of work as labour-power and/or labour-time, and entails a unique set of contradictions regarding how to straddle the rift between work as what Rikowski refers to as the "commodification of the soul" (p. 16) and as a form of purposeful engagement with activities, "interests, desires, motives (and dreams even) that run counter to the subsumption of the self as labour-power" (p. 15). These contradictions permeate the present moment in which work is actual, and invite consideration of the role of learning as central to coming to terms with a contradictory reality.

The research will be carried out through a series of work-life histories of individuals whose work is in some way strongly identified with any or all of the four areas identified above. Interview questions will explore participants' perceptions and experiences in three areas: a) work as labour-power; b) work as not-labour-power; and c) living with contradiction. This study focuses on how, why, and in what way individuals resist the process of self-reduction to labour power. As Rikowski states, such studies are "useful in terms of understanding how the capitalization of the human can be resisted...[as well as] how people become orientated towards incorporation of themselves under labour power (human capital)" (Rikowski, 2002, p. 27).

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Bridging the Solitudes: Exploring School to Work Transitions of Marginalized Youth at Seneca College and York University

Robert Drummond, Carl James, Jan Kainer, & Leanne Taylor
York University, Toronto

Abstract: This roundtable discussion reports on a pilot project that is investigating the post-secondary experience of marginalized youth at Seneca College and York University.

Round Table Outline

This roundtable discussion reports on a pilot project funded by a SSHRC Community University Research Alliance (CURA) grant, which investigates the post-secondary school experience of marginalized youth at Seneca College and York University. A central aim of the *Bridging the Solitudes* project is to recruit disadvantaged youth, and assist their transition to college and university, by offering funding and other supports as they progress through their academic programs. A second objective is to facilitate the students' transition to the labour market by offering a work placement. Community organizations and trade unions offer the "bridging students" paid placements at their organization in their third year of study. The first student cohort is beginning their placements in the summer and fall of 2003. The core research questions concentrate on the barriers marginalized youth face when they enter post-secondary education. Another research focus explores the value of a work placement program, not only for the bridging students, but also for the organizations where they are placed.

There are several research strands within the *Bridging the Solitudes* project, and each one will be reported on separately at the roundtable. Robert Drummond is analyzing access programs in Ontario post-secondary institutions with the intention of helping administrators improve access, especially for students confronting systemic sources of discrimination based on gender, race, ability, class and so on. He is analyzing the student selection process in the *Bridging the Solitudes* project, and will speak to its strengths and pitfalls. Carl James and Leanne Taylor are conducting longitudinal research on the academic experience of the Bridging youth. Using data from student focus groups, individual interviews and life history methods (e.g. reflective journal entries), they will discuss the students' experience of the process of "getting in" to post-secondary school and their actual experience once they have entered the academic realm. Students' conversations reveal a complex understanding of their participation in, and the influence of, the Bridging access program. Jan Kainer is interested in the role of trade unions and community groups in work education programs. She is investigating the work placement experiences of bridging students, and will remark on the potential benefits of placing students with these non-profit organizations.

The “Healthy” Workplace: Who Benefits? Who Doesn’t?

Karen Foss, University of Alberta, Edmonton, Alberta

Abstract: This roundtable discussion will describe institutional ethnography as a method of inquiry. In this instance institutional ethnography is used to examine broader social relations in the context of the healthy workplace.

Round Table Outline

Today’s workplaces are complex. In a competitive global marketplace workers are under constant pressure to be flexible, innovative, and malleable to change. As a result of this constant pressure to adapt to change, costs associated with employee absences, illness, injury, and loss of productivity are rising. It is suggested that worker health be closely tied to overall business strategy because evidence exists that commitment by organizations to employee health results in lower work related illness and injury rates. For this reason healthy workplaces are an increasing priority for various institutions in Canada.

Institutional ethnography offers a way to study the notion of the healthy workplace. Its theoretical underpinnings offer an opportunity to ask several important questions related to the everyday work-life shaped by healthy workplace practices. How does the ‘ruling apparatus’ construct what is valued as an outcome of workplace health? Is there, as Dorothy Smith would suggest, value in favouring the lived reality of workers over the constructed realities of privileged leaders in terms of researching workplace health? How do organizational practices, such as written policies, shape the daily circumstances of workplace health? Is this notion of a healthy workplace another form of social control?

Objectives

The purpose of this roundtable discussion will be:

- To briefly describe the effect that work and workplace organization has on workers’ health.
- To discuss what is being valued when the health of the workplace is left to individual workers to create.
- To discuss who is being excluded by healthy workplace practices.

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Older Workers: Lessons Learned from the Nova Scotia Pilot Projects

*Jeannine Jessome & Marjorie Davison,
Nova Scotia Department of Education*

Round Table Outline

Based upon the experiences of a series of pilot projects funded in Nova Scotia to address the needs of older workers, a roundtable presentation will be offered detailing the approaches taken by the projects, the issues facing older workers, and the best practices determined from the project's experiences. The goal of the pilot projects is to help older workers re-enter the workforce and/or maintain employment. Nova Scotia, as well as the rest of Canada, is facing an aging and rapidly retiring workforce. In fact, "It is forecast that the population aged 45 to 64 will represent 48% of the working age population by 2015" (Older Workers in the Labour Market: Employment Challenges, Programs and Policy Implications, Forum of Labour Market Ministers, 2002). Strong growth in the 65+ age group, fewer younger workers entering the labour market, and low older worker participation rates creates a demographic situation that could potentially result in considerable and serious skills and labour shortages. While older workers are an important asset to the workplace and offer experience, expertise, and mentorship, they face barriers such as the perceptions of employers that older workers are not flexible or "up-to-date" in terms of new work processes or technology. Additionally, the literature indicates older workers are half as likely as younger workers to participate in employer-sponsored training. Despite this, demographics and statistics clearly indicate employers, unions and government must find innovative ways to attract, retain and transition older workers in order to avoid looming skills and labour shortages. In addition to Nova Scotia's experiences, innovative approaches of other provinces and territories will also be shared during the roundtable. The Older Worker Pilot Project Initiative is funded by Human Resources Development Canada (HRDC) and is coordinated by the Nova Scotia Department of Education through its Skills and Learning Branch. A copy of the presentation will be supplied for listeners, as well as copies of materials developed during the course of the Older Worker Pilot Project Initiative.

Shifting Our Focus: Moving from Supported Employment to Supported Employers

*Louise Lockhart & Rick Goodfellow,
Alberta Human Resources & Employment
Tim Weinkauff, Persons With Developmental Disabilities*

Abstract: Persons with disabilities continue to be unemployed or underemployed compared to the population at large. How can our workplaces to become more inclusive?

Round Table Outline

The value of employment in the lives of people with disabilities is well articulated in numerous federal/provincial agreements, which include:

- In Unison: A Canadian Approach to Disability Issues
- Employment Supports for Persons with Disabilities (ESPD)
- Employment Assistance for Persons with Disabilities (EAPD),

and other initiatives wherein the goal is to ensure people with disabilities can participate in the labor market as equal citizens.

However, despite the best efforts of government, the statistics and stories clearly show that people with disabilities in Canada experience far greater barriers to employment than people without disabilities. Regardless of participation rates or wages, the comparisons demonstrate that there are great inequities related to employment that need to be addressed in order to enable people with disabilities to be more involved in Canada's workforce.

One option is to shift the focus from only providing employment supports for the individual with a disability to also supporting their employer and co-workers. Future employment supports for adults with disabilities would focus on enabling employers and co-workers to provide supports traditionally done by job coaches, as well using their knowledge of the work environment to shape the nature and intensity of support(s). This shift to a more holistic model of employment supports will create a more inclusive workplace where employers and co-workers play a direct and meaningful role in ensuring people with disabilities successfully participate in the workplace.

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Leadership of Inclusion: Making the Circle Bigger for Everyone

Cairine MacDonald, University of Alberta

Abstract: The author of this roundtable reflects upon her extensive business experience for lessons and guidelines in effective, inclusive leadership. While a woman's perspective is considered the author concludes that inclusive leadership strategies can be used by men and women alike.

Round Table Outline

As a female executive, I have participated in three studies of women in leadership over the past number of years. As a result, I have been forced to think about and articulate influences on my career, and my role as a woman. Further, in my current position as EPCOR Executive in Residence at the University of Alberta School of Business, I am engaged in active dialogue on the issue of women in leadership within both business and educational contexts.

Leadership, to be effective, must be inclusive - it must open and embrace all of the employees and not single out those who are unique in some way. At the same time, it must be open and embrace all employees *including* those who are unique. The best management and the best education make the circle bigger, and invites employees and students to take their places in the circle.

It has been my experience that there are a few critical practices that distinguish leadership of inclusion:

Mr. McLaughlin taught me to **set high standards** - for myself and others, when I was his executive assistant in the early '70s. He always used to say, "Miss Tory, your work must be perfect!" He would then clarify that otherwise people would be distracted by the typing or presentation and lose sight of the content of the economic studies we worked on.

It is important to **create a visual signal**: when I was community school co-ordinator, Dick Baker was the principal. At that time I was working from a back room shared with community groups. Dick wanted to increase the importance of community education and insisted I move to a vice-principal's office at the front of the school. He then put me on the School Council with all of the other key decision makers and then urged me to "assume the authority."

It is critical to ensure that inclusion **involves social activities** - you need to ensure that you invite the women on the team to go to the bar, to play golf or to do other things their peers are involved in as a matter of course - and to pick activities which are fun for everyone.

In a similar vein, it is important to **challenge your team**. Are they using the fairest methods of selection, which see the best candidate selected? Have they taken into account the balance of employees in their area? If the area is predominantly female, are those being promoted representative of the group? The leader must also **hold human resources “feet to the fire”**. It is clear that people management is the function of the management team. The human resources staff are there to facilitate, assist, provide structure to programs. However, the initiatives and the outcomes must belong to management. The best attribute for a leader is to **be colour blind**. It really doesn't matter if you are a different sex, race or religion as long as you are competent, can do the job and deliver results.

If you are a woman, you must **share your perspective!** This is a lesson I learned, reluctantly, only very recently. I was challenged to share my views as a woman in leadership by a subordinate at EPCOR. He was very clear that this was my responsibility as their manager. My perspective was important and I was “the only one they could learn these things from directly.” Finally, and this is critical - **silence is not an option**. I worked for an outstanding individual at one time, a wonderful person who promoted me to a senior position, but who generally was silent on the issue of gender diversity. During his tenure, the role of women in the company actually moved backward, just because there was no visible leadership to challenge the team to think about things and behave differently.

I want to end with a poem my mother taught me when I was young and with a call for inclusion. The best management is management that makes the circle bigger for everyone and invites employees to take their places in the circle. Good management for women is also good management for men!

SYMPOSIUM

Learning Works: A Symposium Presentation

*Val Davidson, Gay Douglas, Kathy Neill, Anne Ramsay,
Jane Tuer & Cheryl Conway
QUILL Learning Network, Ontario*

Abstract: This report presents an overview of *lessons learned* in a pilot project for workplace literacy conducted by a consortium of five regional literacy networks in Ontario.

In the last five years we have heard about the “knowledge-based economy”, the skilled-labour shortage, and the impact of the technology wave on industry. All this and more contributes to the *Changing Face of Work and Learning*. As workplaces change so, too, do the demands on employee's essential skills.

Human Resources Development Canada defines essential skills as the “skills people use to perform a wide variety of daily life and occupational tasks.” These include reading, writing, numeracy, as well as oral communication, problem solving, basic computers operations, decision making and working with a team.

Adult learning centres have been teaching these skills for decades. Whether it's called literacy,

upgrading, adult basic education or workplace preparation, adult educators have long known that training needs to be relevant, goal-directed and delivered at a flexible pace for adults be successful. While this training philosophy has been replicated in some workplaces, it has become more evident in the last two years that when there are enormous skill gaps, combined with an aging workforce it becomes even more important to see value in training employees in essential skills. Yet, during cutbacks and economic pressures, the training budget is often the first to be cut.

Initial research from the 'Learning Works' pilot project in Ontario shows that Essential Skills Training leads to:

A more productive and collaborative working environment
Increased potential for success in other advanced training programs
Reduced risks at work

Brief History of the Pilot Project

Five regional literacy networks in Ontario were chosen in the winter of 2002 to pilot a workplace literacy initiative being introduced by the provincial Ministry of Training, Colleges and Universities (MTCU). The networks were chosen as much for their diversity as for their experience and interest in connecting adult education to the workplace. As part of the pilot phase, networks worked with publicly-funded delivery agencies to develop and build a framework for promoting, marketing and delivering workplace essential skills training to Ontario employers on a fee-for-service basis. It was crucial that there be flexibility in the delivery models and in the ability to customize the content of the training programs. For all of this to come together within the time period, development work was needed, especially in the areas of protocols, policies and best practice principles.

Regions of Northern, Eastern, Southwestern and Midwestern rural Ontario were represented amongst the five chosen networks. The pilot phase got underway in the spring of 2002, and will wrap up and the end of September 2003. Resources produced as a result of the project include marketing materials, document templates, and, most importantly, a summary report that outlines lessons learned, challenges and success, and recommendations for future implementation. The project manager at each network agreed that it is crucial to the value of pilot projects that 'lessons learned' get passed on, eliminating the likelihood of duplication and unnecessary challenges for agencies coming on board at a later date.

Learning Works: Project Recommendations & Lessons Learned

The connections and partnerships made with employers during the pilot stage confirmed that the perceived need for essential skills training in the workplace can be tied to changes in the workplace, future trends, an aging workforce population, and how much value the employer places on training. The networks connected with a diverse range of employment sectors; including manufacturing, tourism, hospitality, call centres, and small business.

There was consensus throughout the pilot stage and as we move into the next stage of development, that "Learning Works." How successfully we move from a pilot stage to a full implement stage depends on how closely we look to our own research and follow our own recommendations.

There can be a meeting of the minds and operations between traditional adult learning programs and workplaces. Agencies can package and promote a valuable product to employers with essentials skills training. Successful awareness and delivery campaigns can be achieved and grassroots community-based

trainers can become social entrepreneurs by taking some key steps and considerations. To bring learning to work and to show that learning works, delivery agencies need to:

1. Move away from the non-profit mind-set
2. Take important time to develop a coordinated plan
3. Realize the value of building trust
4. Develop protocols and policies
5. Develop an effective marketing strategy and tools

1. Move Away From a Non-Profit Mind-Set

During this project the networks worked with publicly funded delivery organizations. Other than some colleges and schools boards that have corporate training departments, there was little experience or exposure to a fee-for-service program. Agencies delivered free literacy upgrading to adults who needed it. There was accountability and value for certain, but no exchange of product for dollar. This initiative required a different mindset and as such it became important to learn about the for-profit world. Our research showed some clear differences and similarities in areas such as:

- structure of business
- company goals
- business decision criteria
- sources of income staffing
- government regulations and taxes
- survival and marketing

Knowing the similarities and differences between the two worlds is the first step in approaching a fee-for-service initiative. In this case, networks and delivery agencies were going to be selling a product—essential skills training—but also a value and in essence becoming social entrepreneurs.

Simply put, a non-profit social entrepreneur addresses social issues by starting a business enterprise¹. Essentially, social entrepreneurship will allow a non-profit to meet a social need while at the same time become more financially self-sufficient.

2. Take Important Time to Develop a Coordinated Plan

“Coordination – bring into proper relation; cause to function together or in proper order” (Oxford Dictionary of Current English).

In each of the five pilot regions, the networks worked with more than one delivery agency. The ultimate goal was to have a seamless system of delivery to offer to the employers, but that meant working first to develop a coordination model wherein all agencies worked together while at the same time capitalizing on their unique programming options. A 5-stage development model includes:

- Identifying a common goal and shared benefits
- Building cohesion of vision and structure
- Coordinated implementation and capacity-building
- Front-end marketing
- Evaluation

Lessons learned included:

- The importance of documentation of structure (roles and responsibilities – “get it in writing”) developed by the network and partner literacy agencies
- Value the process of cohesion development and ongoing relationship maintenance among the partners and network including revisiting the documentation to refresh memories or to orient new representatives from the partner agencies (staff turnover)
- Determine and deliver excellent professional development to practitioners and administrators
- Thoroughly prepare a marketing strategy to educate employers about essential skills training before selling services and count on an extended length of time to undertake this important and challenging task
- Be persistent and patient – changing perceptions and challenging current workplace training policies and beliefs is a long term goal

3. Realize the Value of Building Trust

Trust is the foundation on which all successful work relationships are built. It is an essential component of excellent organizational performance. When there is trust within an organization, people are more open to new ways of thinking and conducting business.

The networks were charged with supporting and coordinating the development of the pilot initiative in their areas. More effort was required than was anticipated to establish a balance between Government/Funder directives and expectations and the realities, abilities, and needs of agencies and the networks. Moving into essential skills in the workplace--from a non-profit to a for-profit work environment--truly requires a strong foundation of trust. We firmly believed that in order to maintain or improve the existing level of trust within and among the organizations we would need to plan from the ‘ground up’ and involve as many of the people impacted by the change as possible.

We applied many of the values of community economic development in our strategy including:

- Broad-based participation in the change process
- Pro-active, not reactive response to the change
- Use of strengths and assets already in existence
- Aimed at building long-term sustainability

Change management strategies were implemented to help ease the transition into this new initiative. Our experience showed that a clear understanding of the purpose and direction of essential skills training in the workplace established greater trust. This allowed the project to move forward in a smoother, more collaborative manner.

In all networks an “advisory group” of sorts was developed. The groups had varying responsibilities across each of the five areas, but included planning and coordinating regional activities, assigning staff from delivery agencies in key lead roles, and providing a sense of status as well as a ‘face’ to the project.

What we have found is that investing time up-front to establish trust and commitment is well worth the effort in the long run; however, building trust is ongoing. Some organizations and some staff remain resistant. Good communication between agencies and the networks has allowed the workplace initiative message to be received in a variety of formats and from several sources.

4. Develop Protocols and Policies

At some critical point in the development of social entrepreneurship the coordinated advisory groups needed to formalize the partnership relationship in writing. These documents clarified individual responsibilities and mutual understandings of the partners.

The documents you use may be as simple as a letter of agreement or as complex as a contract. Both types of documents are appropriate at various times in the evolving partnership relationship.

Why formalize the partnership?

- To reflect the underlying principles, philosophies and ethics of the partnership
- To set the common vision and shared expectations of the partners
- To clarify needs and strengths of each partner, what each brings to the relationship
- To acts as a planning tool setting out policies, time lines and steps
- To communicate progress and professionalism - “We mean business”
- To serve as documentation should disagreement or arise
- To provide a benchmark for evaluation and re-drafting the relationship
- To serve as an orientation and provide consistency should the partners change
- To weed out those who are unable to commit to the partnership
- To create a framework on which to build future activities

Lessons learned:

- Don't rush to formalize.
- Anticipate resistance.
- Formalize in steps.
- Use different documents for different purposes.
- Keep your documents fluid - Review and revise as needed

5. Develop an Effective Marketing Strategy and Tools

The networks agree that all the aforementioned criteria needs to be addressed before marketing directly to employers can occur. As we have read and heard through all the research “you only get one chance to make a first impression.” In the world of workplace, every second spent reading materials, listening to a sales pitch and contemplating a product—in this case a training program—costs.

The five networks arrived at this stage at various times during the pilot phase and in fact some have yet to reach that stage. What we know is that learning works when you know what it takes.

There are 4 Rs to preparing your marketing strategy:

1. **Research:** Research your community to identify employers and their training needs
2. **Reflect:** Your marketing strategy needs to reflect your community profiles and what you learned in your research.
3. **Resource:** With this it is important to consider not just the resources you are going to develop to promote your program, but the resources (human and financial) you have available for marketing.
4. **Record:** Record everything! Keep detailed notes of contacts made, all responses, method of communication, how many times, etc.

Final Observations

The end result and impact of this pilot project may be months and years away. We have seen positive change and advancement in all regions, but there are still trails to blaze. The changing face of work and learning will continue to change—just when we think we have it all figured out.

All communities are unique; therefore no one patented formula is going to work. Take the time to move slowly into the area of social entrepreneurship and realize the value in building trust and establishing a coordinated approach. Put a ‘checks and balances’ system in place and don’t underestimate the importance of protocols and formal documentation.

And when you are ready to knock on that employer’s door for the first time, do it with the confidence that what you are marketing is the springboard for success at every level of the company’s production.

¹INC Library, What is nonprofit social entrepreneurship? <http://www.nonprofits.org/npofaq/17/92.html>