READ
Society

Workplace Learning Project, Phase 2

Bridging Employer and Employee Needs in British Columbia's Capital Region

Final Report

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Executive Summary

This report describes the activities of Phase 2 of the Victoria READ Society's (READ) Workplace Learning Project, funded through the Canada–BC Labour Market Development Agreement, and provides information for workplace learning stakeholders about Organizational Needs Assessments (ONA) focused on basic skills.

This project responded to the ongoing concerns of businesses in the Greater Victoria area about managing change and recruiting and retaining promising employees. In the fall of 2009, READ staff worked with a total of four businesses from the retail/wholesale/grocery and hospitality/accommodation sectors in Greater Victoria to field-test an Organizational Needs Assessment process. All of the employers who participated in this study offered a variety of employee training and none of the employers were currently providing training in English as a Second Language, reading or writing.

An Organizational Needs Assessment (ONA) is built around business objectives and operations, and uses a mix of formal and informal research methods, including observing employees doing their jobs, conducting semi-structured interviews and focus groups with staff and managers, doing surveys and reviewing print materials. The purpose of the ONA is to help businesses determine their overall training needs – both for them as employers and for their employees. Each participating business received a complimentary ONA report, including suggestions for a range of next steps and training options.

Recommendations for Participating Employers

In addition to providing an outline and analysis of the initiatives undertaken as part of this project, this report provides a composite list of recommendations made to the four participating employers in areas related to six basic skills – reading, writing, document use, oral communication, thinking and problem-solving, and numeracy – and the two additional areas of interest – computer use and training plan preferences. The composite list of recommendations for participating employers from the retail/wholesale/grocery and hospitality/accommodation sectors is outlined below.

Basic Skills

- Review all job descriptions and include basic skills requirements, using up-to-date Human Resources and Skills Development Canada job profiles.
- Whenever possible, incorporate basic skills training into job-specific training.

Reading

- Provide more opportunities for oral (face-to-face) communication.
- Determine when to use written communication. Ensure that employees use plain language in written communications.

Writing

- Have all management take an in-house course in plain language in order to write in a manner that is accessible to all staff.
- Offer short training programs on "Writing for Work."

Document use

- Provide a short workshop on understanding pay stubs for all current employees and include as part of the orientation for new employees.
- Provide consistent training in the correct use of new forms and documents.

Oral communication

- Ensure that interpersonal communication is addressed during customer service training.
- Use a variety of ways to engage employees during meetings, such as small group discussions, and having employees write down and submit their ideas and suggestions.
- Define the level of required fluency in English, both generally and for specific jobs, and include in job descriptions.
- Provide employees with in-house ESL support.
- Include in new employee orientation packages and quarterly with paycheques a one-page list of ESL community resources, and consider financially supporting employees who access off-site ESL training.
- In the hiring process, include a score for multi-language abilities in applicants.
- Incorporate training on positive cross-cultural communication in the workplace into customer service training.

Thinking and problem-solving

- With input from long-term employees, develop a one-page information sheet on key day-to-day tasks. Provide this sheet in an orientation package for new employees.
- Review and standardize all Standard Operating Procedures (SOPs) for clarity, consistency, and accuracy, and review the system through which SOPs and updates to them are communicated to employees.
- Provide training in conflict management and general problem-solving.

Numeracy

- Provide hands-on training focused on measurements, calculations and basic mathematics to supplement mandated training.
- Develop a simple, step-by-step checklist for numeracy tasks required at work. Involve employees in developing the lists.
- Provide training for all employees in counting cash and counting inventory.

Computers

- Review physical layout and access to make the best use of available computer support.
- Offer computer training as a vehicle for basic skills training, with games to help with mathematics, writing for work and basic grammar.

Training

- Provide as much flexibility in training times as possible.
- Provide training during paid work time, for maximum participation.
- Provide professional training in conflict management for employees who deal directly with the public.
- Develop an in-house leadership training program in consultation with management.
- Annually evaluate training procedures. Have experienced employees provide direct input into training manuals.
- Conduct individual basic skills assessments, both on hiring and for current employees.

A Culture of Learning

- Actively discourage judgmental comments related to learning and abilities.
- Develop a statement about the business's understanding of learning as a continuum. Include this in employee orientation packages.
- Strengthen and lengthen job shadowing or develop a "buddy" program for new employees.
- Include employees in developing and facilitating training workshops, to support leadership and reinforce a caring, inclusive work culture.
- Recognize and reward those who help each other with basic skills. Make it an expectation that informal learning is always part of work life for employees at all levels.

Lessons Learned

Finally, this report outlines the "lessons learned" by the Victoria READ Society in the development and delivery of this project. The lessons come both from field-testing the ONA process and from a final project evaluation conducted by a third party with project participants. The lessons are ordered in a manner that reflects the sequence of work and that may be useful to others planning to undertake organizational needs assessments.

- **Lesson 1:** Understand and meet businesses where they are at on an organizational learning continuum.
- **Lesson 2:** Assign specific hours to each step of the ONA process in consultation with employers and employees and manage to agreed-upon allocation.
- **Lesson 3:** Consult with both staff and management
- **Lesson 4:** Extend project timeline from one year to 18 months.
- **Lesson 5:** Take time to ensure vertical and horizontal business buy-in.
- **Lesson 6:** Collect quantitative and qualitative data, if possible.
- **Lesson 7:** Include a one- to two-page plain language summary in all reports.
- **Lesson 8:** Contextualize sensitive topics as broader issues in the labour force.

1. Introduction

Purpose of This Report

This report both describes the activities of Phase 2 of the Victoria READ Society's Workplace Learning Project and provides information for workplace learning stakeholders about Organizational Needs Assessments (ONA) focused on basic skills.

Project Description

In 2008, the Victoria READ Society, with funding from the Canada–BC Labour Market Development Agreement, began a series of labour market studies to determine how basic skills levels may be affecting businesses in Greater Victoria. In Phase 1, employers and employees from five sectors were interviewed. In Phase 2, in response to employer requests, READ developed a process to assess the basic skills training needs of a business. Four businesses in the retail/wholesale/grocery and hospitality/accommodation sectors in Greater Victoria participated in field-testing the process during the fall of 2009. Each business received a complimentary ONA report, including suggestions for a range of next steps and training options. The assessments were intended to help employers determine the best focus for their training dollars, and ensure that training programs are aligned with business goals and that training is relevant to employee needs.

Need

The project responded to the ongoing concerns of businesses in the Greater Victoria area about managing change and recruiting and retaining promising employees. One successful strategy is to provide learning opportunities: employees want to learn, and they may leave a job that is not providing them with the opportunity to grow. Phase 1 of this project, which included interviews with employers and employees in five sectors and a study of international best practices, showed that safety, productivity and loyalty increase with basic skills training, and that learning builds confidence and flexibility.

With the shift in the Canadian economy from manufacturing and natural resource extraction to a knowledge-based economy, continuous learning is essential. In order for Canadians to keep pace with the continuous change in today's world of work, they must have basic skills, including reading, document use, numeracy, writing, oral communication, and problem-solving. These skills can be developed at increasing levels of complexity throughout life. They provide the foundation for other learning and enable people to adapt as their jobs change.

In READ's Phase 1 surveys, employers said they consider literacy extremely important to the future success of their business. Employees can read, write and add, but some still struggle to fill out forms accurately, understand or give oral instructions, calculate quantities accurately or use computers.

Basic skills education takes place informally in most workplaces, with people helping each other as needed. Workplace learning programs make this process more systematic and effective.

Organizational Needs Assessments

An Organizational Needs Assessment (ONA) is a customized process built around business objectives and operations. It is completed using a mix of formal and informal research methods, including observing employees doing their jobs, conducting semi-structured interviews and focus groups with staff and managers, doing surveys and reviewing print materials. The ONA assists employers and employees in determining training needs and establishing a starting point for a workplace learning roadmap.

An ONA is not an assessment of an individual employee's basic skill levels or a training program. Rather, it helps determine overall employer and employee training needs.

Done in collaboration with employers and employees, an ONA represents a first step towards understanding how basic skills may be affecting safety, productivity and turnover in a workplace. The ONA helps employers achieve:

- transparency – by identifying the interests of both management and staff
- support for learning – by consulting employees at all levels
- focus – on collective needs and goals rather than singling anyone out
- discovery – of existing talents and skills to share through mentoring or peer training
- accessibility – by identifying solutions to barriers, and
- realistic expectations – about what a workplace learning program can and cannot do.

2. Approach

The Victoria READ Society understood that this project would provide a service that would benefit most businesses in the target sectors. READ also recognized that many businesses had not identified and linked the impact of basic skills to their day-to-day operations. As a result, not all businesses associated the overall value of the planning results from an Organizational Needs Assessment (ONA) with recruitment and retention.

Part of Phase 1 of the Workplace Learning Project involved classifying employers according to stages of readiness for implementation of training plans. The categories of readiness, based on a modified version of a scheme developed in New Zealand,[1] were:

1. Unaware and unfavourable – would not consider implementing a workplace basic skills program

2. Unaware and favourable – have conditions that highlight a recruitment, retention or training need, but have not made the connection that basic skills training could be a possible solution

3. Aware – recognize that some of their business needs and issues can be addressed by focusing on basic skills, but have not yet implemented any programs

4. Implementers – have made the connection between business issues and basic skills upgrading, and are investing in at least one workplace learning program.

Employers who participated in Phase 2 of the Workplace Learning Project were at the fourth level of readiness, all four of them having implemented some form of learning and training program in the workplace.

In working with these employers, READ's overall approach was designed to make participation attractive and easy for both employers and employees. A communications and engagement strategy was developed, using different tactics and tools to appeal to each group, particularly given the varying basic skills levels among target employees.

The goal was to communicate with employees through language that was easy to understand and sensitive to employees' feelings, including possible negative emotions around learning. When writing and designing materials for employees (or materials that might be seen by employees), READ therefore avoided referring to "low skills" or a lack of high school education, and instead said the opportunity to be involved in an ONA was available to eligible employees who were interested in improving their basic skills.

The language and tactics for employers and secondary audiences, such as business associations and the media, took into account the challenges of the current economy, but were also forward-looking, to ensure that the messages created today will still have appeal later, regardless of market fluctuations.

Three key messages were developed for this project and were reflected in all of the conversations and tools developed with employers:

· ONAs help us see how basic skills affect our business.

· Safety, productivity and loyalty increase with investment in basic skills training.

· Learning builds confidence and employment flexibility.

Communication tools were carefully developed before taking the project to the larger community, to clearly explain the project (see Appendix A), benefits of basic skills training (see Appendix B) and basic information about ONAs (see Appendix C).

Steering Group

A steering group was established for Phase 2 of the Workplace Learning Project. Members included representatives from local businesses, employment agencies, social service providers, industry training organizations, governments, community literacy practitioners and the media. The steering group's mandate was to:

· share insights about workplace literacy and essential skills issues affecting employers and employees in Greater Victoria

· provide perspectives specific to their particular workplace sector

· suggest strategies for recruiting employer and employee participants

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[1]   Ruth Schick, *Employer Investment in Workplace Literacy Programmes.* (Workbase: The New Zealand Centre for Workforce Literacy Development, 2005, www.workbase.org.nz)

- preview communication materials
- suggest strategies for circulating findings
- validate the research approach and the interpretation of findings
- contribute value-added resources, such as meeting space, expertise and publicity, and
- advise on other relevant matters as they arose.

Engaging Employers

READ decided at the beginning of the project to approach employers in a strategic, measured fashion. In addition to approaching employers who had participated in Phase 1 of the project, READ determined that an engagement strategy would be successful if:

- three employers in the different sectors agreed to field-test the ONA process
- the participating employers increased their own ability to assess basic skills, and
- the participating employers were interested in continuing to the implementation stage.

READ research staff approached 14 employers over a period of three months, through business associations; contacts in community-based, business-serving agencies; sector councils; and human resources practitioners.

Employers were screened for participation through an application form that captured information about:

- business size
- structure
- sector
- networks

- knowledge of literacy and basic skills
- approach to employee basic skills, and
- existing training programs.

Employers with the highest likelihood of being successful pilot sites for the ONA were invited to schedule an appointment with the project researcher. Four employers were then selected on the basis of their sector-appropriateness, previous experience with READ, timing and project capacity.

All of the participating employers noted that the project, which which required data collection in the summer/fall, fell during an extremely busy time of year for their sector, and that early spring would have been easier. The project timing may therefore have reduced interest in participation.

Business Profiles

The business profiles of the four participating employers are reflected in Table 1.

None of the employers were currently providing training in English as a Second Language, reading or writing.

Planning Sessions

At the start of each ONA, representatives from the participating business and Victoria READ Society staff attended a planning session. Employers were encouraged to have a cross-section of employees participate in the planning session; however, non-management staff attended only one of the planning sessions.

Table 1: Business profiles of participating employers

Business	Sector	Union	Size	Computer use	Cultural awareness	Customer service	Equipment	Management	Orientation	Task-specific	Teamwork	Safety
1	Accommodation	Yes	Mid-size		x	x		x	x			x
2	Accommodation	Yes	Large			x		x	x			x
3	Retail	No	Mid-size	x		x	x	x	x	x		
4	Retail	No	Large	x	x	x	x	x	x	x	x	x

The purpose of the planning session was to understand:
- the business context
- human resources issues
- current training provision and support for learning
- awareness of basic skills issues
- employer goals for the ONA, and
- preferred methods for the ONA.

Each employer set goals for the ONA, which influenced the approach and methods used. Employer goals were to:
- understand the level of basic skills among employees, and how basic skills are used in the workplace
- assist employees in achieving their full potential
- understand how informal learning supports employees – in other words, "who talks to whom and who helps each other?"
- discover new or innovative (and preferably simple) ways of delivering learning to diverse employees
- understand cultural and linguistic diversity
- identify important situations where employees need to improve their basic skills, and the most effective ways to close those gaps, and
- provide employees with an opportunity to give feedback on the training they want.

The planning sessions reflected the Victoria READ Society's understanding, based on best practices elsewhere, that ONAs are most effective when their design is adaptable to employer and employee needs. This not only takes into account concerns around time efficiency, but also ensures that the assessment responds to the employer's objectives, employee input and existing organizational culture.

Research Tools

Research tools were customized to meet individual employers' goals for the ONA. Initial drafts of surveys and focus group questions were designed according to ONA best practices. Although the final drafts were customized for each employer, there were some common elements in the questions asked of employees, addressing:

- their use of and capacity with basic skills–related tasks
- current formal and informal learning support
- their training needs
- their own measures of success for a training program.

Three of the four employers had their designated planning team review and approve their research tool, and piloted it with employees. The pilot testing allowed corrections to be made in the tools to ensure that questions were clear and relevant to the particular business. The research tool review and piloting process was more thorough in some businesses than in others, resulting in better and more relevant data.

Encouraging Employee Participation

Each employer promoted employee participation through a variety of different methods, including posters, announcements at staff meetings and emails. Had time permitted, other methods, such as announcements in employee newsletters or notes in pay envelopes, could also have been used.

Employers and READ staff tried to be as clear as possible about what to expect in the survey or focus group. However, focus group participants commented afterwards that they had been nervous or unsure of what to expect, and some listed expectations that were significantly different from the planned activity (e.g., reading books together). Some had been told to come and weren't sure why. Employees stated that it would have been helpful to know in advance that their comments were confidential and that there would be "no repercussions for us."

Employee comments:
- *"It's really important to me to have this chance to learn. I'm glad they are doing this."*
- *"I think surveys such as this one give employees a chance to voice their opinions, which is important."*

Employers provided incentives for employees to fill out the surveys or participate in a focus group. Each employer donated one or two prizes with a $50 value for a draw for all employees who participated. Although employee participation in each assessment was lower

than hoped for, several of those who did participate noted their appreciation that their employers were asking the questions.

Data Collection Methods

READ's decision to provide flexibility in data collection methods had some negative impacts. Employers were concerned about the time it would take to collect both qualitative and quantitative data. As a result, READ did not gather both types of data from businesses. However, had the timeline permitted, one business would have been willing to collect both forms of data.

Table 2 shows the data collection method used for each employer, as well as the quality of data, rate of participation and level of confidentiality.

Quantitative data: Surveys

Surveys were delivered in three ways: on paper, through a web-based form, and in person.

The advantage of surveys is that they allow quantitative data to be captured – for example, the percentage of respondents who felt that co-workers could complete basic skills–related tasks most of the time. Surveys also allow for easy comparison across employers in order to determine how common certain issues are. In addition, surveys are generally seen as being more valid forms of data collection, as people tend to have more confidence in numbers than in qualitative comments.

However, in this case, given the focus on basic skills, there were disadvantages to using written surveys (on paper and web-based). Some potential participants might not have had sufficient reading or writing skills to participate. Discomfort with computers may have further limited participation in the web-based survey. Individuals might have had to waive confidentiality by asking a friend or co-worker to help them fill out the survey. Employees were given permission to complete the survey on work time, during their shifts, which might have been harder to do if asking for help meant confessing limited literacy to a co-worker. In addition, some participants might have been concerned about their handwriting being recognized, and therefore chose to limit their comments. Certainly the most forthright and blunt comments about basic skills needs came in the web-based survey, which was the most anonymous research tool used.

The web-based survey had additional challenges, with programming errors resulting in a section of unusable data. The survey form was programmed by an out-of-house IT group used by the employer undergoing the ONA. More thorough checking by READ staff might have prevented the programming errors. The web-based survey was the most efficient way to reach a large number of employees, and was used in a business with a culture of computer use.

The surveys that were completed as in-person interviews with a READ staff person elicited rich data, some of which could be analyzed quantitatively. However, this method is extremely time intensive and is less confidential; interviews were set up by management,

Table 2: Data collection method and confidentiality level, data quality and participation rate

Business	Method(s)	Confidentiality	Data quality	% of employees
1	In-person interviews; paper survey	Low	Some surveys incomplete; limited comments	12%
2	Focus groups	Low	Good	13%
3	Survey	High	Good	49%
4	Web-survey	High	Some web-form problems; very good data	3%

and management therefore knew who was participating, although it would not have been easy to link comments to individuals.

One employer preferred not to do surveys, because they "already do enough surveys." Had the timing of the project been more flexible, basic skills questions could have been incorporated into an existing survey.

Qualitative data: Focus groups

Focus groups provided rich data, as well as an opportunity for dialogue among employees about issues. Focus groups were not audio-recorded; responses were captured by a note-taker in the room. This approach is not uncommon in focus group sessions. Knowing their voices are not being recorded can put participants at greater ease, although it ultimately reduces data accuracy.

In at least one focus group, READ staff noticed that some participants were almost silent. Speaking in public and/or sharing an opinion that differs from the opinions of a group of co-workers can be challenging for some, reducing full participation. Finding time to attend a focus group can also be difficult for some employees.

Again, confidentiality was a concern. Management organized participation in the focus groups, and while they were not present in the sessions, there may have been concerns among participants about sharing critical perspectives. Similarly, the presence of other co-workers might have made it harder to say anything that could be construed as negative.

One employer committed to completing a survey and focus groups, if time permitted; unfortunately, it did not. Timeline restrictions are common to many funded projects, but can hinder participants' need to participate in projects on their schedule. This issue is discussed further in section 4, Lessons Learned.

3. Findings and Recommendations for Employers

This section provides a summary of the common findings from the four Organizational Needs Assessments (ONA). Employee comments and examples of related recommendations are included to provide a sense of the range and flavour of the research and reports.

Basic Skills

> **Employee comment:**
>
> • *"Would it not be possible to do a 'suitability' test prior to hiring? I realize that we are hiring at entry-level wages, but we have some employees that can't multiply by 10 unless they are holding a calculator. Surely we should be testing for that!"*

Basic skills are the core skills that employees need to do their jobs successfully. They include reading, writing, document use, numeracy, problem-solving, computer use and other important skills, attitudes and behaviours that are essential to workplace success.

Each ONA found that some employees did not have all the basic skills they needed to complete their jobs. Areas where employees reported supporting each other included reading memos and emails, filling in forms or writing reports, counting cash and inventory, interpersonal communication and using computers.

Each employer had a strong informal support network, which included employees at all levels. However, the impact of these basic skills challenges was still being felt. Despite evidence that both management and staff were frequently addressing basic skills issues with their co-workers, comments throughout the data suggested assumptions about basic skills. Most commonly reported areas where employees helped each other were in writing, document use and numeracy.

Recommendations:

· Review all job descriptions and include basic skills requirements, using up-to-date Human Resources and Skills Development Canada job profiles.

· Whenever possible, incorporate basic skills training into job-specific training.

Reading

> **Employee comments:**
>
> • *"Colleague got note saying 'good job.' She didn't know and asked him what it said."*
>
> • *"It's not always that they can't [read], just that they don't because it's too long/boring/etc."*
>
> • *"I find the longer the note/training manual the employees have to read, the less they retain. If you keep it short and direct, they seem to understand it better."*

Reading skills were typically needed for reading short notes, emails, memos, manuals, and longer instructions. It is difficult for people to admit that they need assistance with reading; however, reading was one of the basic skills that employees frequently indicated that they helped others with. This was particularly common in two of the businesses that have high percentages of immigrant employees, where co-workers frequently help each other with English.

Recommendations:

· Provide more opportunities for oral (face-to-face) communication.

· Determine when to use written communication. Ensure that employees use plain language in written communications.

Writing

> **Employee comments:**
>
> • *"Who uses perfect grammar to leave notes at work?"*
>
> • *"There have been a few instances when we cannot tell what word they were trying to spell."*

Employees noted that writing more plainly, or repeating information orally, has benefits for co-workers who may have basic reading skills but do not absorb written information well.

Another issue that may have contributed to perceptions of basic skills challenges was the intergenerational diversity in several of the employers' workforces. Differences in grammatical standards and communication styles among employees were common sources of complaint in the ONA data.

Recommendations:

· Have all management take an in-house course in plain language in order to write in a manner that is accessible to all staff.

· Offer short training programs on "Writing for Work."

Document use

> **Employee comments:**
>
> • *"A quick description of pay stub calculations and deductions on a pay stub in the future would be great."*
>
> • *"Employees often leave strange notes on the bottom of timesheets in an attempt to communicate rather than communicating directly with their manager."*

The document that consistently caused confusion across the four employers was the pay stub, and both management and staff requested support in explaining or understanding pay stubs and calculations. Employees also often reported challenges entering information into forms and logs – challenges related to reading, writing and problem-solving.

Recommendations:

· Provide a short workshop on understanding pay stubs for all current employees and include as part of the orientation for new employees.

· Provide consistent training in the correct use of new forms and documents.

Oral communication

> **Employee comments:**
>
> • *"We keep telling people to all speak English when we are all together. Some people speak their own languages and exclude others. It's more polite and respectful [to speak English]. It's very rude to not speak English. Some groups laugh behind your back, which hurts, but we are used to it."*
>
> • *"There needs to be a better basic understanding of English. I ask a basic question and it's not understood."*
>
> • *"People are too self-conscious to speak up in meetings."*

Employees noted oral and written communication challenges, and these challenges were clear through the ONA process, which was conducted in English. In two of the four businesses, and one in particular, the ONA found that employees' lack of familiarity with English influenced the assessment of all of the other basic skills.

English as a Second Language (ESL) challenges are related to issues of cultural diversity, and the way multicultural workforces communicate and work together as a team. Employees in three of four businesses complained about cultural cliques. Yet only two of the four employers included cultural awareness training as part of their standard training. Multilingual staff can be a great benefit for businesses in attracting international clientele.

Management in all four businesses also reported a desire to increase employee engagement, and concern about low staff participation in staff meetings was common.

Recommendations:

· Ensure that interpersonal communication is addressed during customer service training.

· Use a variety of ways to engage employees during meetings, such as small group discussions, and having employees write down and submit their ideas and suggestions.

· Define the level of required fluency in English, both generally and for specific jobs, and include in job descriptions.

- Provide employees with in-house ESL support.
- Include in new employee orientation packages and quarterly with paycheques a one-page list of ESL community resources, and consider financially supporting employees who access off-site ESL training.
- In the hiring process, include a score for multi-language abilities in applicants.
- Incorporate training on positive cross-cultural communication in the workplace into customer service training.

Thinking and problem-solving

> **Employee comments:**
>
> - *"When I started here, I noticed that there are a million ways of doing something. I never get to do things my way, because everyone is correcting me to do it their way. One supervisor does it one way; another does it another way."*
> - *"I think that flow charts are helpful for staff that need to fill out safety log books or first aid records. Having a daily plan set up and posted makes it easier for some staff to understand what it is they need to do."*
> - *"There are too many people in my department that can't/don't make their own decisions. Have a hard time deciding the right thing to do, or rely too much on myself/supervisors or managers to help them."*

The need for standardizing processes was a common theme. This came up in responses concerning both helping employees appropriately address incidents and ensuring that daily tasks are completed correctly.

Recommendations:
- With input from long-term employees, develop a one-page information sheet on key day-to-day tasks. Provide this sheet in an orientation package for new employees.
- Review and standardize all Standard Operating Procedures (SOPs) for clarity, consistency, and accuracy, and review the system through which SOPs and updates to them are communicated to employees.

- Provide training in conflict management and general problem-solving.

Numeracy

> **Employee comments:**
>
> - *"Counting the number of staff needed; counting the number of glasses in dish racks; using clocks to count time until break; calculating the amount of chemicals to mix, how much sanitizer to add to water; excels (calculating the cost when selling customer up to next category); splitting guest bills seven ways; cash out at end of day."*
> - *"High-schoolers don't understand taxes."*

Numeracy was discussed primarily in the context of presenting a challenge to counting (cash or inventory). However, mathematical calculations were used in almost all jobs, and it was the most common basic skill that people reported helping co-workers with.

Recommendations:
- Provide hands-on training focused on measurements, calculations and basic mathematics to supplement mandated training.
- Develop a simple, step-by-step checklist for numeracy tasks required at work. Involve employees in developing the lists.
- Provide training for all employees in counting cash and counting inventory.

Computers

> **Employee comments:**
>
> - *"I cannot use the computer unless I can read and write. I have to start at the beginning."*
> - *"Reading, writing, etc., are very good for me, but computers is what I want."*

Two of the four employers already had computers available for employees to use on breaks. Computer training was frequently requested by employees, and the high degree of interest in computer training presents an opportunity for employers to use computer training

as an entry point for basic skills training, tailored to the needs of their workforce.

Recommendations:

- Review physical layout and access to make the best use of available computer support.
- Offer computer training as a vehicle for basic skills training, with games to help with mathematics, writing for work and basic grammar.

Training

Employee comments:

- *"The best way to learn is hands-on. I want to do it myself, not let the trainer take over."*
- *"Having the online courses has allowed me to do the training I am interested in, without having to fight for it."*
- *"We are a people-driven organization, and since we switched to all the computer training for [in-house training program] our service levels have dropped. New employees sit at a computer for their first days of training and are swamped with knowledge that is very difficult to retain. Plus they have no interaction with people. It is easier to schedule but the quality of the output is very poor."*
- *"Give everyone the same basic training and the same amount of training time. People had widely varying lengths of training."*
- *"Training should be scheduled so there is total focus and time to do it."*
- *"Flexibility for training is key if it is important."*
- *"Worry that it would be too hard is important for many people."*

Training questions were designed to support the employers in developing training plans, and build on the deeper understanding they had gained about the training needs from the high-level basic skills assessment. Employees were asked how they were trained, how they like to be trained, what timing and location for training works best, what would provide a barrier to training and what other areas of training they want to pursue.

Employees most commonly learned their jobs through hands-on training, followed by shadowing or informal learning (with a buddy). This is also how most employees indicated that they like to learn, as long as clear Standard Operating Procedures are provided. However, employees at all four businesses requested computer training, which can be very useful as a way of addressing basic skills challenges.

In businesses where job-specific training was computer-based, training costs were reduced and the flexibility in timing made it easier for more people to participate. Some participants noted that computer-based training does not work for all types of training (e.g., customer service).

Employees recommended that employers provide training during paid time, on the worksite. The most commonly reported barriers to training were family and work responsibilities.

It would be useful – although a significant investment for employers – to have each employee participating in basic skills training first assessed by a professional in order to determine the individual's knowledge base. This would help avoid people finding training "too hard," and help better place training dollars where they are most needed. Ensuring that people are learning at their own speed and with their own style of learning increases success rates.

Recommendations:

- Provide as much flexibility in training times as possible.
- Provide training during paid work time, for maximum participation.
- Provide professional training in conflict management for employees who deal directly with the public.
- Develop an in-house leadership training program in consultation with management.
- Annually evaluate training procedures. Have experienced employees provide direct input into training manuals.
- Conduct individual basic skills assessments, both on hiring and for current employees.

A Culture of Learning

Across the four employers, only 1–2% of employees indicated that they do not ask for help when they need to learn something. Employees ask peers, supervisors and managers, and most comments suggested that they feel comfortable asking questions. However, there were several participants across employers who noted feeling uncomfortable asking so many questions, or who reported only asking questions of particular groups of employees. Some employees also noted that they were sometimes too busy to ask for help.

Informal learning can be recognized, rewarded and supported. For example, informal learning can be added to performance review processes. Tapping into more formal support from peers is also an option. For example, providing a buddy for new employees would offer a point of contact for general queries about day-to-day operational issues, and access to someone who is familiar with the business's culture, attitude and expectations.

Comments made by employees at all levels in two of the four businesses suggest a perception that some staff are not as smart or knowledgeable as they are expected to be and that cultural and language barriers make it difficult to work effectively as a team. Whether these comments reflect a lack of sensitivity around literacy issues, intergenerational issues in the workforce, or other workforce dynamics, they should be explored further. Employers could address these potential issues by providing diversity training and encouraging employees to view learning as a continuum and a life-long process.

Recommendations:

- Actively discourage judgmental comments related to learning and abilities.

- Develop a statement about the business's understanding of learning as a continuum. Include this in employee orientation packages.

- Strengthen and lengthen job shadowing or develop a "buddy" program for new employees.

- Include employees in developing and facilitating training workshops, to support leadership and reinforce a caring, inclusive work culture.

- Recognize and reward those who help each other with basic skills. Make it an expectation that informal learning is always part of work life for employees at all levels.

4. Lessons Learned

Through the process of completing four Organizational Needs Assessments (ONA), the Victoria READ Society learned several key lessons that will improve future initiatives. Some of these lessons relate to the overall ONA process and others are specific to the retail/wholesale/grocery and hospitality/accommodation sectors.

Lesson 1:
Understand and meet businesses where they are at on an organizational learning continuum.

READ approached this project understanding that while employers in the retail/wholesale/grocery and hospitality/accommodation sectors would have challenges in their workforce, these gaps might not be visible. Therefore, READ developed an approach that provided the sector with new information about basic skills and made participation in the project as easy as possible.

A pre-existing relationship with READ was one of several criteria for selecting employers to participate. These relationships allowed the process to proceed in an open manner, as some degree of trust had already been established, and READ already had an understanding of each employer's organizational culture and commitment to learning. READ determined the employer's degree of readiness as part of the planning process, acquiring information on existing training programs and knowledge about basic skills. These preliminary planning forms were completed more thoroughly with some employers than with others, and relationships were stronger with some than with others.

Recommendations were designed to help employers make small changes initially, and to build towards more significant changes as the business begins to see and reap the benefits of basic skills training. Understanding what the employers had already done to encourage learning and how they approached training was essential in designing recommendations that could be implemented.

Lesson 2:
Assign specific hours to each step of the ONA process in consultation with employers and employees and manage to agreed-upon allocation.

Undertaking an ONA requires an investment of time and human resources by employers and employees. To prepare all participants for this reality, READ developed a preliminary timeline and a process framework that included nine steps—developing purpose and scope, defining participation, communicating to the organization, choosing and developing ways to gather information, collecting data, analyzing the data for skills needs, writing a report based on the findings, debriefing the clients and having the project evaluated.

As the work moved forward, additional steps were added to the framework and operational realities extended the time it took to complete some of the steps. These factors expanded the amount of time devoted to each ONA by approximately 30%. These additional hours stretched employer, employee and READ resources.

At the beginning of the planning cycle, allow for unexpected delays and build that time into the overall time estimate. Prepare a time estimate for employers and use this to guide the work you do together.

Lesson 3:
Consult with both staff and management.

One of the clear findings from the three ONAs where staff and management data could be analyzed separately was that staff and management had differing understandings of basic skills capacities.

In two of the three businesses, management reported substantially fewer incidences of basic skills requiring improvement than did staff. One manager assumed that staff had adequate basic skills to read reports ("I assume they are comfortable reading reports"), yet many of the staff described their co-workers' inability to read notes and memos. In the third business, management and staff together identified different sets of basic skills requiring support and improvement. Management saw challenges in writing reports and

using documents, while staff reported challenges in counting cash and inventory.

Staff and management also expressed notably different desires for training. It was useful to be able to report these desires separately.

Including both levels of employees therefore provided a more complete picture of basic skills levels and training needs.

Lesson 4:
Extend project timeline from one year to 18 months.

The shorter window for developing and conducting ONAs reduced opportunities for vertical and horizontal business buy-in. Each ONA required participation from management across departments (horizontal) and employees at all levels (vertical). Yet in two of the four businesses, ONA planning participants noted that not all managers had understood or valued the ONA process. Equally, each planning process identified opportunities to promote the project among employees, which employers were not able to follow through on because of the limited time available.

Extending the project timeline over 18 months would not necessarily mean more funding. Rather, it would provide the time employers need to move the process along internally, between contacts with READ.

Lesson 5:
Take time to ensure vertical and horizontal business buy-in.

The shorter window for developing and conducting ONAs reduced opportunities for vertical and horizontal business buy-in. Each ONA required participation from management across departments (horizontal) and employees at all levels (vertical). Yet in two of the four businesses, ONA planning participants noted that not all managers had understood or valued the ONA process. Equally, each planning process identified opportunities to promote the project among employees, which employers were not able to follow through on because of the limited time available.

Extending the project timeline over 18 months would not necessarily mean more funding or more work. Rather, it would provide the time employers need to move the process along internally, between contacts with READ.

Lesson 6:
Contextualize sensitive topics as broader issues in the labour force.

The ONAs did uncover some difficult issues – notably comments about overall abilities and cultural challenges among employees. These issues were not a surprise to READ, but are challenging to address.

The selection of employers with some pre-established relationship and the time taken to strengthen that relationship made it easier for READ to provide feedback on these issues. The deeper understanding of each employer's organizational culture and existing programs meant that READ could also contextualize these comments with references to work the employer had already undertaken to address these issues.

Future ONAs might benefit from prepared information sheets on issues in the labour force overall – for example, organizational learning as a continuum, and challenges of intergenerational and multicultural workforces – rather than providing feedback specific to the employer.

Lesson 7:
Include a one- to two-page plain language summary in all reports.

READ produced reports for each of the participating businesses. These reports included a summary page of recommendations, detailed rationale for the recommendations with anonymous quotations from employees integrated into each section, and appendices containing the tools used to collect data.

We had planned to have a plain language summary developed for each employer so that they could give it to staff. However, due to time pressures we decided to consider the summary page in each business report as adequate for that purpose.

Lesson 8:
Contextualize sensitive topics as broader issues in the labour force.

The ONAs did uncover some difficult issues – notably comments about overall abilities and cultural challenges among employees. These issues were not a surprise to READ, but are challenging to address.

The selection of employers with some pre-established relationship and the time taken to strengthen that relationship made it easier for READ to provide feedback on these issues. The deeper understanding of each employer's organizational culture and existing programs meant that READ could also contextualize these comments with references to work the employer had already undertaken to address these issues.

Future ONAs might benefit from prepared information sheets on issues in the labour force overall – for example, organizational learning as a continuum, and challenges of intergenerational and multicultural workforces – rather than providing feedback specific to the employer.

5. Next Steps

This project has increased the Victoria READ Society and the Greater Victoria business community's understanding of Organizational Needs Assessments (ONA) and basic skills in the labour force. Future ONAs will be more efficient as a result, and more businesses may be interested in conducting them. More information is also now available about where support in basic skills would be most beneficial to businesses in the retail/wholesale/grocery and hospitality/accommodation sectors.

Designed in three phases, the Workplace Learning Project is now ready to implement the basic skills recommendations proposed in the ONAs and requested by employers in Phase 1 of the project. Employers want to be able to see how implementing basic skills

training will help recruitment and retention and how to set up a program. Although individual employers who participated in Phase 2 of this project are expected to implement some of the recommendations, they have requested implementation and evaluation services.

The Victoria READ Society recommends that the next phase of research in this area support the implementation and documentation of basic skills recommendations in two of the participating businesses. The documentation would then be used to promote the potential of basic skills training.

Appendix A: Project Description

Discovering Learning Needs: Workplace Learning Phase 2

Project Description

No matter what's happening in the economy, managing change and retaining promising employees is an ongoing business concern. One successful strategy is to provide learning opportunities: Employees want to learn and may leave a job that isn't providing them with the opportunity to grow.

That's what Greater Victoria employees told the READ Society during our year-long research project on workplace learning. Interviews with employers and employees in five sectors, coupled with an inter-national study of best practices, showed that safety, productivity and loyalty increase with basic skills training, and learning builds confidence and flexibility.

We are now developing a tool for assessing basic skills training needs, and inviting businesses to participate. The custom-designed basic skills assessment will show the best way to discover an organization's training needs. Drawing on Canadian and international models, we will be working with businesses in BC's Capital Region to assess the basic skills training needs of their employees. Qualifying businesses are those in the retail, food services, and accommodation sectors.

The project is available at no cost to employers and employees through funding from the Canada-British Columbia Labour Market Development Agreement.

Assess basic skills

In Phase I of READ's workplace learning research, employers said they wanted to know how to find out if basic skills issues are affecting their businesses. In Phase II, we are conducting *organizational needs assessments* to show how basic skills affect individual businesses.

Upon completion, each participating business will receive a complimentary report regarding the status of workplace learning in their business, along with customized options for next steps.

The assessment will help employers understand the best focus for their training dollars, assure that training programs are aligned with business goals, and that training is relevant to employee needs. The results of all the assessments will be analyzed for sectoral trends.

Focus on continuous learning

With a shift in the Canadian economy from manufacturing and natural resources to a knowledge-based economy, continuous learning is essential. Basic skills are indispensible in order for Canadians to keep pace with the continuous change in today's world of work. Basic skills include

reading text, document use, numeracy, writing, oral communication, and problem solving. These skills can be developed at increasing levels of complexity throughout life. They provide the foundation for all other learning and enable people to adapt as their jobs change.

In our Phase 1 surveys, employers said they consider literacy extremely important to the future success of their business. Employees can read, write and add but some still struggle to fill out forms accurately, understand or give oral instructions, calculate quantities accurately or use computers.

Basic skills education takes place informally in most workplaces, with people helping each other as needed. Workplace learning programs make this process more systematic and effective.

Participate in this project

Greater Victoria businesses in the retail, food services, and accommodation sectors are eligible to participate at no cost. We're recruiting businesses during the summer for fall participation.

The READ Society also offers:

- Expert advice
- Community presentations
- Resources
- Workplace Learning educators
- Recognition of workplaces that strive to improve literacy
- More at www.readsociety.bc.ca

Contact: READ Society, 250-388-7225

How Basic Skills Training Benefits Business

Basic Skills training helps retain and promote employees

New hires who participated in workplace education were 2.5 times more likely to stay in their jobs and approximately 10 per cent earned a promotion within a year. *– Excell Corporation, reported in* Focus on Basics*, 2004*

Basic Skills training encourages employee loyalty

Fourteen out of 15 employees said they "love learning" and many would leave a job that didn't provide opportunities to learn. *– Victoria READ Society, Bridging Employer and Employee Need in B.C.'s Capital Region: Phase 1 Report*

Basic Skills training improves safety

82 per cent of respondents to a literacy study associated increased health and safety with their workplace's basic skills program. *– The Economic Benefits of Improving Literacy Skills in the Workplace, Conference Board of Canada, 2007*

Basic Skills training increases productivity

79 per cent of respondents to a Conference Board of Canada study said productivity increased because of basic skills programs in their workplaces. *– The Economic Benefits of Improving Literacy Skills in the Workplace, Conference Board of Canada, 2007*

Basic Skills training reduces product defects, error rates and wastage

In one Canadian study, 85 per cent of respondents saw increases in the quality of people's work and 73 per cent saw increases in work effort. *– The Impact of Basic Skills Programs on Canadian Workplace*

"Training is not simply a 'must-do' – it's a business strategy. If you're not training, you are out of the game."

– Campbell Black, president, Blackline Marine (Sidney, B.C)

Canadian businesses that have addressed the need for workplace learning say employees are:

- *Confident, willing to adapt to changes and participate in ongoing training*
- *Have better team-building and problem-solving skills*
- *Believe they are valued by their workplaces*

Appendix C: The Organizational Needs Assessment

A Primer: The Organizational Needs Assessment

1. What it is:

- the first step towards understanding how basic skills issues may be affecting safety, productivity, and turnover in your workplace

- a way to develop a focused basic skills training strategy that is aligned with business goals and employee needs

- the "you are here" on a workplace learning road map

2. What it is not:

- an assessment of an individual employee's basic skill levels

- a training program – an organizational needs analysis helps determine training needs

3. What it helps achieve:

- transparency – by identifying the interests of both workers and management

- support – for learning by consulting people within all levels of your organization

- focus – on collective needs and goals rather than singling anyone out

- discovery – of existing talents and skills to share through mentoring or peer training

- accessibility – by identifying solutions to barriers

- realistic expectations – about what a workplace learning program can and cannot do

4. What it looks like:

- a customized process built around business objectives and operations

- a mix of formal and informal methods including observing workers doing their jobs, conducting semi-structured interviews and focus groups with workers and managers, doing surveys and reviewing print materials
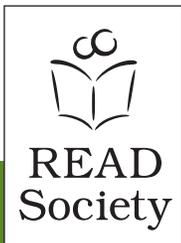
5. What it costs:

- there is no cost to employers or employees – funding is provided through the Canada-British Columbia Labour Market Development Agreement

For more information contact READ Society, 250-388-7225