Literacy Ontario

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Goal-Directed Assessment: An Initial Assessment Process

Ontario

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An Initial Assessment Process

What's Inside?

Special Thanks

The creation and production of *Goal-Directed Assessment: An Initial Assessment Process* drew upon the efforts, knowledge, skills, and guidance of practitioners and literacy workers in Ontario. Their input is greatly appreciated.

Introducing This Manual

That the field of assessment is in ferment is ... good news. A decade ago there was little attention to the subject. Today there is not only interest but considerable searching, experimentation and a variety in actual practice ... We have begun to understand that assessment is more than testing, that what can be learned from giving a standardized test is but part of the story.[1]

What Is This Manual About?

*G*oal-Directed Assessment: An Initial Assessment Process describes an initial assessment process to document what potential learners in literacy programs have already achieved and still need to achieve in order to reach specific goals.
It builds upon the strategies developed by the Labour Adjustment Initiative in Ontario between 1992 and 1995, in particular, the work of Charles Craig and Stan Jones. It gives literacy assessors and instructors a framework and a practical approach to an initial assessment option for unemployed and employed workers, as well as for other learners.

Although this document briefly discusses the broader issues of learner assessment carried out at different times during the instructional process, it focuses on initial assessment. Initial assessment involves determining or beginning to determine a learner's goals, abilities, interests, and needs, usually before the learner enters a learning program or soon after the learner has started one.

The initial assessment can be informal or formal and may include a single meeting or series of meetings. It allows the learner and the assessor to collect the information required to set realistic goals and to determine a viable training and learning plan.

This manual neither prescribes a particular intake process or assessment method nor endorses a particular assessment instrument or set of tools. Research and practice indicate that there is no single *right way* for assessing learning. What process, procedures, and instruments you use will depend on each learner's and each organization's needs and purpose for assessment. Consequently, this manual refers to a mix of data-gathering methods and instruments for the initial assessment of a learner.

Adult educators have found that practitioners cannot rely on traditional academic measures alone to assess learning. Often, these standardized measures do not provide the kind of information relevant to individual or program goals. As a result, literacy practitioners are searching for assessment practices and instruments which are more informative to learners and instructors and also acceptable to educational institutions, employers and funders. This manual reflects this approach to assessment.

....

Assessment is one of the most important and pressing issues facing the literacy community. At every turn, we are hearing and telling others that we must reform assessment.[2]

....

How Can This Manual Help You?

This manual is designed for use by basic skills assessors and deliverers working with unemployed and employed workers, as well as with a broad range of literacy learners. It will also be helpful to program managers and administrators.

It offers you a practical model for assessing learners' achievements in ways that are relevant and meaningful to their specific needs and goals. It provides you with a broad framework for conducting an initial assessment and for creating an individualized training plan. The assessment process will help learners to shape their education or training paths, regardless of the deliverer.

Goal-Directed Assessment: An Initial Assessment Process takes you step-by-step through an assessment process which is, as the title suggests, directed by a learner's particular goal or goals.

When you are working in plant closures and large downsizing situations, the process will help you to assess the learning achievements and goals of workers who are preparing to enter other jobs, specific skill-training programs or post-secondary education.

When you are working in workplaces, the process will help you to assess workers who want to do their jobs more effectively, meet new job demands, advance within the company, or prepare for the future.

When you are working in other types of literacy settings, the process will provide an assessment framework to help learners develop training plans linked to their individual goals.

In working through this assessment manual, you, as literacy practitioners, will:

◆ examine a framework for determining the purposes and key features of learner assessment;

◆ examine one approach to initial learner assessment;

◆ learn the steps involved in a goal-directed assessment process;

◆ identify various assessment tools;

◆ learn how to implement a goal-directed assessment process;

◆ learn how to develop an individualized training plan;

◆ identify issues which arise when developing and implementing a goal-directed assessment process; and

◆ apply the steps involved in the goal-directed assessment process to your own situation.

The process outlined is generic. You can apply it or parts of it to a variety of learners.

This Manual Is a Work in Progress

As is the case for assessment in general, this manual is a work in progress. It is simply a starting point and an impetus to continue the dialogue about initial assessments and learner assessments in general. It invites you to participate in the task of revisiting assessment.

Furthermore, literacy practitioners in Ontario are currently developing methods to assess learners' needs, goals, and achievements in relation to a program approach based on learning outcomes.

This assessment manual attempts to begin to link a program approach based on learning outcomes to specific stages of goal-directed assessment.

How Do You Use This Manual?

Goal-Directed Assessment: An Initial Assessment Process has an introduction, six chapters, a blank form for an individual's training plan, references, and a bibliography.

The first part of the manual briefly describes:

◆ what assessment is;
◆ what the purposes of learner assessment are;
◆ why an initial assessment of learners is important; and
◆ what goal-directed assessment is.

The rest of the manual describes each step in a goal-directed assessment process and discusses a variety of procedures and tools which you might apply at each step.

Building on the information presented in the preceding chapter, each chapter begins with:

Input what you will need before you begin;

Process what steps you will follow;

Results what you will achieve.

Where possible, the manual refers to assessment practices and tools which literacy delivery agents in Ontario have developed or are currently using. Furthermore, each chapter includes quotations and anecdotes from literacy practitioners and learners.

Working with the case study

A feature of *Goal-Directed Assessment: An Initial Assessment Process* is
a case study which illustrates one way to apply the steps of a goal-directed assessment.

As you proceed through each step, you will follow the case study of Bina, a workplace literacy coordinator, and Gloria, a laid-off worker. Bina and Gloria work together to assess Gloria's learning achievements and strengths in ways which relate to her goals, needs, and interests. Although a goal-directed assessment can be used with

learners at all levels of proficiency, Gloria will be using the process to help prepare for her goal of post-secondary education.

The case study does not propose to dictate how you should carry out a goal-directed assessment with a learner. Instead, it is written as a descriptive narrative, designed to supplement the background information presented in each step of a goal-directed assessment process.

Now it's your turn

After you have read through each chapter and followed the assessment procedures applied in the case study of Gloria and Bina, you will have an opportunity to practice goal-directed assessment strategies in your own work. You will find a blank individualized training plan form in Appendix One.

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INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Personal Information

Name
Address

Telephone
Additional

General Information

Date of Assessment
Assessor
Company
Location
Additional

Background Information

Educational Experiences and Strengths

Transferrable Skills

Preferred Learning Style

Obstacles and Challenges

Work History and Strengths

Required Supports

Science

Science

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Page 3

Assessor's Signature
Learner's Signature

Providing an Assessment Framework

Input   To begin this chapter, you need:

- a commitment to conducting meaningful assessments of learners' achievements.

Process   In this chapter, you will learn about:

- the meaning of learner assessment and its key features;
- the evolving field of learner assessment;
- the purposes of learner assessment at various stages of a learning program;
- the purposes and value of initial assessments; and
- the characteristics and value of the goal-directed assessment process and an individualized training plan.

Results   By the end of this chapter, you will be able to:

- discuss the purposes and value of learner assessment; and
- describe the goal-directed assessment process as an initial assessment option for literacy learners.

What Is Assessment?

*T*he word "assess" comes from the Latin term "assidere," which means to "sit beside." Santopietro (1991) describes the assessment process as educators "sitting beside" learners to get information about their proficiencies, backgrounds and goals and, in doing so, to immerse themselves in the lives and views of their students.

Ecclestone (1994), focusing on further and higher education, describes assessment as measuring appropriate evidence against a standard or scale. Reliable evidence of a learner's performance can range from formal paper and pencil tests to portfolios of a learner's accomplishments. Standards or scales involve measuring a learner's performance against one of three things:

1 a group of people or another person: *Can the learner convert fractions to decimals better than a large group of individuals or another person who has performed the same task?*

Such norm referencing focuses on comparing a learner's performance to the performance of others, rather than on measuring a learner's achievements based on specific standards. Looking at the individual's performance with the norm for many individuals, norm referencing is often used to select learners by ranking their performance in order of preference.

2 an absolute criterion: *Can the learner convert a list of fifteen fractions to the equivalent decimals with 90% accuracy?*

Criterion referencing does not focus on comparing a learner's performance to the performance of others. Rather, it uses externally-defined standards to provide specific information about what learners can do. Such assessments provide learners and assessors with information about how well a learner's performance reflects the competencies needed to meet specific goals.

3 the learner's own previous performance: *Can the learner convert fractions to decimals better now than before the instructional program began?*

Self-referencing uses self-defined standards so that learners can note their own improvement and set their own targets.

Literacy delivery agents often use combinations of norm referencing, criterion referencing and self-referencing to assess learners' achievements at different stages of a learning program.

From a workplace education perspective, Jurmo (1995) views assessment as one of several decision-making tools for key stakeholders, including management, workers, union representatives, and training deliverers. Assessment can be used to:

◆ identify the learning goals and abilities of both the organization and individual workers involved;

◆ plan strategies for using existing resources to meet those goals; and

◆ monitor and revise those strategies.

....

...assessment has much in common with the monitoring tools used in 'total quality management' and related approaches to organizational development which emphasize continuous planning and improvement of operations to meet customer needs.[3]

....

Key Features of Good Practice in Assessment

Fingeret and Jurmo (1989) and Lytle (1988) believe that assessment should build on learners' accomplishments and abilities rather than on their deficits. It should allow learners to articulate what they already know and what they already can do.

Many literacy programs support this belief by placing an emphasis on recognizing and formally acknowledging the learning achievements of adults.

According to Lytle (1988), the movement to "reinvent" assessment is based on learner-centred and participatory approaches. Such approaches communicate a respect for literacy learners by respecting their own needs and aspirations and by encouraging them to participate

as equal partners in the assessment process. Learners who actively participate in assessing their learning are more likely to feel a sense of ownership and may work harder to succeed.

Assessment Is in a State of Change

The field of learner assessment is evolving. In recent years, literacy practitioners and researchers have examined various assessment practices and tools. Many felt the need to find alternatives to the standardized methods. They promoted the use of alternative or more authentic assessment practices which go beyond standardized procedures.

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The aim of authentic assessment is to assess many different literacy abilities in contexts that closely resemble the actual situations in which those abilities are used.[4]

....

Practitioners and researchers are working to develop assessment practices which contribute to learning. They are using a variety of assessment instruments, such as portfolios of learners' work or activities which reveal how learners actually use basic skills in different situations.

....

An activity in which students work individually to select from several choices the right answer to a question based on a passage of several paragraphs has little relation to students' developing the use of literacy in schools, communities, and workplaces.[5]

....

Workplace literacy programs, in particular, are developing custom-designed assessment practices and instruments which incorporate specific workplace situations, tasks, and materials. Workplaces are using these instruments to help workers identify the training which they need to do their jobs better and to meet broader personal goals.

Similarly, literacy practitioners from other delivery sectors are focusing on the need to develop alternative practices and tools to assess adult literacy learners.

What Is the Purpose of Learner Assessment?

Carried on at different times throughout the instructional process, learner assessment has *different* purposes at different stages. Furthermore, it uses different techniques and methods for these different purposes.

Initial assessment for learners

When you conduct assessments before learners enter a program, you and the learners are able to review their prior learning and past achievements and to identify their current competencies. Initial assessment also enables learners to:

◆ explore and then set goals for learning;

◆ examine the required skills and knowledge related to those goals; and

◆ determine a plan of action.

Ongoing assessment for learners

When you conduct learner assessments during a learning program, you and the learners are able to examine:

◆ how they are doing, against an agreed upon goal;

◆ how they might improve; and

◆ how well the learning program fits their learning needs.

Exit Assessment for learners

When you conduct learner assessments at the end of a learning program, you and the learners can examine whether they:

◆ have achieved certain competencies or qualifications;

◆ have met their goals; and

◆ were satisfied with the learning experience.

Regardless of when learner assessment occurs in a learning program, its primary purpose is to give the learners and you an opportunity to appraise their past and present critically as they set specific and realistic vocational, educational, or personal goals.

Although the purposes, methods and instruments used in learner assessment vary, literacy practitioners agree that learner assessment should be a continual process.

What it [assessment] hopes to accomplish is wide-ranging and complex: the provision of information useful to teachers in planning instruction, to learners in determining their own progress towards particular goals, to program managers and staff in evaluating their instructional impact on learners' lives and to funders in ascertaining a degree of program accountability and success.[6]

Why Do an Initial Assessment with Learners?

The primary purpose of an initial learner assessment is to assess and then to evaluate, as carefully and comprehensively as possible, a learner's skills, knowledge, aptitudes, and interests in relation to individual goals. Carried out primarily for the learner, initial assessment can use externally-set standards or standards set by the learners themselves.

An initial assessment can help learners to set realistic and appropriate training, vocational, or broader learning goals based on clear information about their current abilities and the abilities required for specific goals. Carried out primarily for the learner, this initial diagnosis provides learners with information they can use in making appropriate choices. It also provides assessors and instructors with information which will affect course content, curricula, learning and teaching materials, and teaching approaches.

Initial assessment will enable you to identify:

◆ what skills, knowledge, aptitudes, and abilities learners have or believe they have;
◆ what learners want and need to know or do to function effectively at work, at home, and in the community;
◆ what goals learners have;
◆ what learners require to reach their goals; and
◆ what learners expect to gain from a program.

In brief, at the end of an initial assessment, a learner should be able to answer the following questions:

◆ *Where do I want to go?*

◆ *Where am I now?* and

◆ *How do I get to where I want to go?*

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For John MacLaughlin, Manager of the Preparatory Training Program, Metro Toronto Movement for Literacy, the initial assessment enables learners to build a clear and realistic pathway leading from literacy to more advanced training options or employment.

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Initial assessment requires that learners be reflective about many aspects of their personal characteristics and past experiences. This process lays the groundwork for learners to understand the empowering effect of self-assessment—how it can help them feel in control of their lives. Because learners are likely to be faced with multiple changes in their work and personal lives, this sense of control will be constantly challenged.

Meeting the Ministry of Education and Training Core Quality Standards

Effective initial assessment helps literacy education programs to meet many of the program core quality standards for literacy programs supported by the Workplace Preparation Branch, Ministry of Education and Training (M.E.T.). Five of the eighteen program standards emphasize:

◆ learning assessment which involves the learner, evaluates the learners' progress on an on-going basis, and contributes to their development;

◆ a commitment to learners by providing them with the opportunities to develop independence, critical-thinking skills, and problem-solving skills;

◆ a respect for learners by providing a supportive learning environment and giving constructive feedback of their learning achievements;

◆ access and equity by adapting its processes, systems and practices to meet the unique and individual needs of each learner; and

◆ learner-centred approaches and methods which enable learners to take control of their learning.

Goal-Directed Assessment as an Initial Assessment Process

Although assessment methods and tools must stay flexible and responsive to the needs of learners, literacy delivery agents benefit from having an assessment framework. The goal-directed assessment process helps to provide such a framework.

The goal-directed assessment process is a five-step process which is goal-directed and goal-specific. In this initial assessment process, your strategies and tools are shaped by the specific goals of each learner. Furthermore, the specific goals of each learner become the primary objectives of the learner's training program.

....

To learn easily, most adults need to focus on a specific learning goal. Any training (basic fundamental education, language, academic preparatory, or vocational) should be focused on the step which follows it.[7]

....

For example, the primary goal of unemployed workers is usually to get a job as quickly as possible. So, when you and the learner determine that specific skill training is needed, then the retraining needs to be presented as leading to the primary goal of re-entering the workforce. Or, when basic skills upgrading is needed, then the upgrading also needs to be presented as a stepping stone to a job, skill training, or post-secondary education.

In workplaces, learner assessments are also shaped and determined by the company's or organization's goals. These goals are usually linked to job-related functions, as well as to broader workplace issues, such as team work, problem solving, and interpersonal communications. The challenge for the assessor is to balance the learner's personal goals and objectives with the organization's goals and objectives in the learner's individual training plan.

Used as an initial assessment process, a goal-directed assessment gives learners a clear picture of their learning needs as they relate to their employment, training, or personal objectives. It also gives learners, assessors, and instructors a realistic strategy to meet these objectives.

The goal-directed assessment process incorporates the key
principles of adult education, including:

◆ **Adults should be full participants in the learning process.**

◆ **Educators learn with, and from, the learners.**

◆ **Adults learn when they perceive a need to learn.**

◆ **What is learned, in most cases, should have practical value.**

◆ **Adults participate in setting their learning goals.**

◆ **Learning is built upon what adults already know.**

◆ **Initial assessments and evaluation of progress should involve
the learners and be based on clearly-defined goals.**

◆ **Learning is a life-long process.**

◆ **Adults want recognition for learning.**[8]

What characterizes the five-step process?

In the goal-directed assessment process, the learner's specific
goals form the basis of an instructional strategy and program.
Furthermore, clearly defining prior learning levels makes it possible
to develop or to select the most appropriate training program to
bridge the gap between where learners are now and where they
wish to go.

In applying the goal-directed assessment process, you can use both
quantitative and qualitative research methods and a wide range of
instruments, including tests, interviews, self-assessments, checklists,
inventories, job-related tasks and writing samples, as appropriate to
the learner and the context.

The goal-directed assessment process focuses on five areas:

1 the learner's personal, educational, and employment backgrounds;

2 the learner's long-term and short-term goals;

3 the skills needed to reach those goals;

4 the learner's current abilities; and

5 the learner's skill gaps and plan of action to reach the goals.

A learner-centred process

A goal-directed assessment is learner-centred and learner-driven. As
the primary stakeholders, learners become active players in the

goal-setting and assessment activities. What you assess is determined by learners' goals and literacy needs within the contexts they define. Shaped primarily by learners, the process is their own, with you, the assessor, acting as advocate and information source.

Linking work and learning does not preclude a learner-centred approach to assessment. However, you must work to ensure that workers are centrally involved in any goal-setting process so that the program focuses on goals which are meaningful and motivating to them.

A *participatory process*

A goal-directed assessment is participatory. It requires that the learner and assessor participate actively. According to Lytle, Belzer, Schultz and Vannozzi (1989), a collaborative relationship underlies the active participation of both learners and assessors. Learners and assessors share the power, which results in the learner having significant responsibility for program decision making.

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Participatory literacy assessment is often discontinuous with previous experience of learning in school and therefore contrary to the expectations of most adult students … As a result, participatory assessment may be encouraging or empowering for adult learners at the same time that it causes conflict by creating new roles and power relationships.[9]

....

A challenge for you may be keeping the learner actively involved throughout the entire assessment process.

....

A participant in a workplace education program for entry-level workers in a fast-food franchise, James felt anxious when an assessor asked him to define his individual goals, needs, accomplishments, and interests. He was not used to being asked to voice his opinions freely and to validate his strengths.

....

A *time- and labour-intensive process*

As an intake assessment process, the goal-directed assessment process is time- and labour-intensive. However, in most assessment

situations, you will have only one or two contact interviews to collect essential information.

Often, the time it takes to collect assessment information exceeds the available time. This situation is particularly true in workplace contexts. In such cases, the process of researching the information could continue during the course of the basic skills program, as part of the program and instructional objectives.

For example, researching a specific, long-term employment or educational goal could be incorporated into the learner's training plan and program.

An outcomes-based process

The goal-directed assessment process supports a program approach based on learning outcomes. Learning outcomes are statements of the essential skills, knowledge, and behaviours which a learner can demonstrate. They represent significant chunks of integrated learning which can be performed, measured, and verified.

To identify significant learner achievements, M.E.T. is in the process of introducing learning outcomes. Some examples of these learning outcomes in communications, math, and personal and career development are:

◆ presenting and promoting ideas using various forms of communication;

◆ using appropriate learning aids to facilitate computations; and

◆ employing self-management skills which promote effectiveness in the workplace.

Using the goal-directed assessment process, an assessor identifies the learner's current abilities, learning strengths and preferences, prior learning, short- and long-term goals, and goal requirements. The resulting individualized training plan identifies the programming to support the achievement of the learner's goals. The goals may be very specific to the individual or may fit in with general courses.

By using commonly accepted learning outcomes in your assessment process, you will help to ensure that learners and deliverers have significant and transferrable information about learners' achievements.

Creating the Individualized Training Plan

The goal-directed assessment process results in a training plan for each learner. In the individualized training plan you will identify the significant demonstrations of learning needed by the learner to reach specific training, employment and personal goals.

....

Learners will benefit from having realistic, long-term, individualized training plans that:

◆ **are based on an individual assessment of learner needs;**

◆ **are portable and transferrable among training providers;**

◆ **specify learning goals in a training/employment context;**

◆ **specify the exit criteria that will enable the learner to proceed to the next level of training and/or employment.[10]**

....

By providing learners with a training plan, you will give them a concise picture of their individual learning needs in relation to their employment, educational, and personal objectives. It will also show them what their training program will involve.

As a tool to monitor the progress of a learner and the effectiveness of the training program for the learner, this "mutually agreed upon written document"[11] helps you to keep the training focused and on track. Reviewed on a regular basis, the training plan should be updated as the learner masters competencies and achieves specific, short-term goals.

Part of a portfolio for lifelong learning

Although you may develop a training plan with a learner, it does not
necessarily mean that the learner will start a literacy or workplace
education program. A learner who decides not to begin a training
program immediately may use the information recorded in the
training plan at a future date.

The training plan can become one of the first pieces in the learner's
portfolio, the "purposeful collection of student work that exhibits
the student's efforts, progress and achievements in one or more
areas."[12]

The individualized training plan form organizes information into
five categories, which comprise the five steps in the goal-directed
assessment process:

1 Background information as it relates to work and educational
   experiences, transferrable skills, obstacles, challenges, and
   required supports;

2 Long-term and short-term goals;

3 Goal requirements or skills needed to reach specific goals;

4 Current achievements in the areas of communications,
   mathematics, sciences, and personal and career development;

5 Skill gaps and suggested training program.

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INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Personal Information

Name

Address

Telephone

Additional

General Information

Date of Assessment

Assessor

Company

Location

Additional

Background Information

Educational Experiences and Strengths

Work History and Strengths

Transferrable Skills

Preferred Learning Style

Obstacles and Challenges

Required Supports

Science

Science

Science

Assessor's Signature

Learner's Signature

Step One: Gather Background Information

Input To begin Step One, you will need:
- ◆ an understanding of the value, purposes and characteristics of the goal-directed assessment process for literacy learners.

Process In this chapter, you will learn how to:
- ◆ discuss a learner's educational experiences;
- ◆ discuss a learner's work experiences;
- ◆ identify a learner's transferrable skills;
- ◆ identify a learner's preferred learning style; and
- ◆ determine a learner's obstacles, challenges and required supports.

Results At the end of this chapter, you will be able to:
- ◆ gather relevant background information about a learner in an environment conducive to effective goal setting.

About the One-on-One Interview

*S*tep One of the goal-directed assessment process involves gathering background information about a learner in a one-on-one interview. It is during this first step that you will establish a rapport of mutual trust and confidence. It is a "two-way process of showing, knowing and sharing."[13] Participating in a one-on-one interview gives learners an opportunity to communicate their needs in a confidential manner. The personal rapport established will facilitate an exchange of the most relevant information to lay the foundation for defining career, educational, and personal goals.

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Barbara McFater, an assessor at the Peel Adult Learning Network (PALN) in Mississauga, often shares relevant and appropriate background information about herself during the initial interview. She finds it puts learners at ease and helps her to get to know them better.

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It is not uncommon for adult learners to anticipate a new experience based on their past experiences. For some learners, the initial assessment process may bring back negative memories. A learner may feel childlike, anxious or intimidated. A learner may also fear being stereotyped or ranked.

....

Albert, currently a student in an Adult Basic Literacy/Numeracy (ABL/N) Program, still remembers how ashamed he felt years ago when his teacher gave him a test to find out how much he knew. "Afterwards, she told me I was at the bottom of the class."

....

For workplaces in particular, learners often associate assessment with performance appraisals and evaluations and may view the

assessment process with suspicion. However, most learners, especially those considering returning to formal learning, appreciate getting detailed and constructive feedback about their backgrounds in order to identify suitable and attainable goals.

Having emigrated to Canada from the United States, Olga is currently studying in an Ontario Basic Skills Program. Laid-off from her office cleaning job, Olga is convinced that discussing her background with a workplace literacy assessor helped her to make an informed decision about preparing to retrain as an early childhood assistant.

So, Step One gives you an opportunity to provide a non-threatening environment in which learners learn to view the assessment process as an integral part of their learning and to overcome any anxieties about it.

Susan Nielson, an instructor at St. Lawrence College in Brockville, attributes much of the initial interview's success to the assessor's attitude and ability to establish a comfort level. For her, one of the assessor's primary roles is to help learners feel unintimidated by the assessment process.

To create a non-threatening atmosphere, you might sit beside, rather than across from the learner, so that the learner can see what you are writing. Often assessors ask learners to fill out parts of the interview form themselves. This technique can give you a sense of a learner's writing abilities and supports learner participation from the beginning.

Mira Iannou of Frontier College in Toronto often gives a copy of the actual interview form to learners before the interview and lets them keep a copy during it.

Ideally, Step One of the goal-directed assessment process should take no less than forty-five minutes. Due to time constraints and the sheer volume of learners in workplaces, you will have to decide which parts of Step One you can abridge.

Setting the Stage

Setting the stage for initial assessment can happen even before you and the learner meet for the first time. Klassen and Robinson (1992) recommend preparing learners for the initial interview beforehand, so that they can participate in the interview more productively.

When arranging for an interview time and place, you might ask learners to think about their goals before the first meeting. Furthermore, some assessors suggest that learners bring examples of reading and writing which illustrate what they can do and where they may need help. You might also request that learners bring along certificates for training taken outside of school and any academic transcripts.

Meeting in person

Once you and the learner meet in person, it is crucial to 'set the stage' before you ask the learner specific questions about her or his background. You should tell the learner:

Tell the learner

◆ what the purpose of the goal-directed assessment process is;

◆ how the assessment process will help them;

◆ what the process involves;

◆ what specifically will happen and how long it will take;

◆ what their role in the interview and assessment process will be; and

◆ how the results, recorded on an individualized training plan, can be used as part of a portfolio for lifelong learning.

In workplace contexts, sharing the results of the workplace needs assessment with learners may influence the goals they set. You will also want to discuss the potential of workplace education for improving current and future employment situations.

Using a Guided Interview to Get Background Information

Many assessors use a guided interview format and record information on a separate interview form. As you ask both open-ended and closed

questions, allow learners to talk freely about themselves in light of their own experiences.

Throughout the interview, encourage learners to ask questions at any time. Your role, during Step One of the goal-directed assessment process, is to guide learners and to be an interested listener.

During Step One of the goal-directed assessment process, among the specific things you will be discussing are the learner's:

◆ formal academic history and experiences with school;

◆ employment history and range of jobs;

◆ transferrable skills;

◆ preferred learning style; and

◆ obstacles, challenges, and required supports.

What will also emerge are the learner's views of literacy, learning, assessment, and the expectations of a training program. You will learn about the circumstances of the lay-off, when the learner is unemployed, and the conditions at work, when the learner is employed.

Begin with simple, factual data about where they are now, where they have been, and where they want or need to go. You can then proceed to ask specific questions about their background as learners, workers, and members of the community.

In cases where learners have emigrated to Canada, it is helpful to learn how long they have lived in their current Canadian location and other places of residence between the time they left their homeland and their arrival at their current location. This is relevant information when you are making subjective assessments of a learner's language experience.

For example, the learner may have left the native country twenty years ago, but lived in two other non-English speaking countries before coming to Canada. This factor would, in fact, influence your assessment of the learner's language acquisition.

Discussing Educational Experiences and Strengths

Having learners describe their educational histories and prior learning might also reveal their past successes and difficulties in the

school system and their current perceptions and feelings about school, learning, or training. Begin by asking the learner:

Ask the learner
- ◆ *What was the last grade you completed at school?*
- ◆ *If you left school early, why did you decide to leave?*
- ◆ *Describe the school subjects you took.*
- ◆ *Which of these subjects did you like or dislike? Why?*

Asking learners to assess their school experiences

To continue the discussion, ask learners to self-assess their overall experiences in a formal classroom setting. You might ask:

Ask the learner
- ◆ *Overall, did you like school?*
- ◆ *How do you think you performed as a student? What do you think affected how you performed?*
- ◆ *Was the classroom a comfortable and successful place for you to learn?*

The learners' answers will give you clues about their self-confidence as learners. The answers will also begin to identify obstacles which may prevent learners from attaining their training or retraining goals and jeopardize their chances for success.

Asking learners about their educational experiences as adults

Ask learners to talk about specific educational experiences since they left school. These experiences may include courses or training taken at work or outside work, such as upgrading, work-related training, and general interest courses.

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For Randa Yacoub, a Workplace Literacy Coordinator in the Western Ontario Region, it is important for assessors to look at a learner's educational history in a very broad sense. This means also looking at the learning which has occurred outside of a traditional school setting.

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Ask learners to identify the learning which they have acquired through life experiences and events at home, in the community, or in their volunteer or union work. You might ask questions, such as:

Ask the learner ◆ *What courses or training have you taken since you left school?*

◆ *Did you take these courses or training at work or outside work?*

◆ *In your activities at home and in the community, what new things have you learned or learned to do?*

◆ *Were these positive or negative learning experiences?*

It is often helpful for learners to prepare a chronological record of their learning experiences.

In discussing a learner's educational experiences, Jurmo (1995) suggests including questions related to individual learning strategies, such as:

Ask the learner ◆ *In which of your learning and training experiences, either at work or outside work, have you felt the most confident?*

◆ *In the most successful experiences, what did you do which helped you to succeed?*

◆ *In the least successful situations, why do you think that you experienced difficulties?*

You will probably have to help learners formally educated outside of Canada to establish Canadian equivalencies for their education and training. They might need referrals for documenting learning which they gained outside Canada.

Discussing Work History and Strengths

Analyzing the work that learners have done in the past will help to draw the connection between where they have been, where they are now and, ultimately, where they want to go. Length of employment, job assignments, range of tasks and responsibilities, and history of employment can give you and the learners an understanding of:

◆ what their work or career orientation has been;

◆ what their past employment was and how it has contributed to their development;

◆ what skills, knowledge and abilities they have acquired;

◆ what they like about their current job or what they liked about previous jobs; and

◆ what they might like to do in the future.

Helping learners to detail their work experiences

When asked about work history, many learners will find it easy to detail their previous and current work experience chronologically. However, you can guide learners by asking direct questions, such as:

Ask the learner

◆ *What types of full-time or part-time work have you done, either paid or unpaid?*

◆ *Where have you worked and for what lengths of time?*

◆ *What were the hours you worked? Days, evenings, weekends, shifts?*

◆ *What were the specific tasks you did in your jobs?*

◆ *What skills or knowledge did you pick up on the job?*

◆ *Describe what you liked or disliked about your job, such as the tasks, other workers, supervisors, and work environment.*

◆ *Do you think you did your various jobs effectively?*

◆ *Would you like to work in any of these areas again?*

....

Individuals may talk of their work history with pride, but may also downplay certain aspects ... Downplaying a job is often done if it is something that a person has worked at 'all his life,' is part of her role within a family, is something that causes embarrassment or was work paid 'under the table' ... In this case, it would be more useful to talk about the skills they used in this work rather than the work itself.[14]

....

Hynes (1995) talks about the importance of helping learners identify work content skills so that they can name the precise tasks which are transferrable to other jobs. Resources like the *National Occupation Classification (NOC)* and Nelson Canada's *Discover* computer program can help workers to detail actual work tasks and skills. Often what surfaces are abilities which go beyond the specifics of their job titles, descriptions and rates of pay.

When time permits, you might want to have learners fill out a *Workplace Skills Checklist* to get a sense of the math-, communication-, computer- and science-related tasks they did on previous or current jobs and whether or not they had any difficulties with them.

These checklists include questions, such as:

c In your previous jobs did you use:

	Always	*Often*	*Rarely*	*Never*
a keyboard?	☐	☐	☐	☐
computer print-outs?	☐	☐	☐	☐
a computer?	☐	☐	☐	☐
a database?	☐	☐	☐	☐
spreadsheets?	☐	☐	☐	☐

Did you have difficulties doing any of these tasks?

c In your current job do you write:

	Always	*Often*	*Rarely*	*Never*
orders?	☐	☐	☐	☐
lists?	☐	☐	☐	☐
telephone messages?	☐	☐	☐	☐
information on forms?	☐	☐	☐	☐
instructions?	☐	☐	☐	☐
directions?	☐	☐	☐	☐
letters?	☐	☐	☐	☐
memos?	☐	☐	☐	☐
notes?	☐	☐	☐	☐
reports?	☐	☐	☐	☐

Do you have difficulty writing any of these documents?

You will be able to verify the self-identified skill levels when you assess a learner's current proficiencies in Step Four of the goal-directed assessment process.

Identifying Transferrable Skills

Transferrable skills are the general skills which learners acquire from one situation and can then apply to a variety of other situations.

....

You [a learner] may have to learn a little more in a new situation, but a transferrable skill gives you the basics.[15]

....

Often learners are somewhat aware of their transferrable skills, but may not know how to describe them. These skills will come to light as learners talk to you about their backgrounds and past experiences.

Learners might acquire transferrable skills, such as the ability to manage time or organize events, through their interests and aptitudes as well as through experiences at work, at home, and in the community. Identifying their transferrable skills will help learners to select appropriate long- and short-term goals.

Stressing the importance of generic skills in preparing for work or employability, the Conference Board of Canada points out that employers look for employees with transferrable skills as well as specific technical or job-related skills. Generic skills, in this context, include organizational ability, creative thinking, teamwork, problem solving, and decision making.

Helping learners to identify their transferrable skills

You will probably need to explain the concept of transferrable skills by giving learners a definition and a few examples. It might be helpful to guide a learner to discuss experiences and interests at home, at work, at school, and in the community by using this approach:

Ask the learner

Tell me about two or more different kinds of situations when you had to...

- ◆ *lead or direct people;*
- ◆ *advise, train, or coach others to develop new skills;*
- ◆ *manage time by working on different things at the same time;*
- ◆ *plan, organize or coordinate people or events;*
- ◆ *solve problems or make decisions;*
- ◆ *communicate or interact with small or large groups;*
- ◆ *work with others as part of a team;*
- ◆ *operate equipment or machinery;*
- ◆ *handle detailed work;*

◆ *assume a position of responsibility;*

◆ *deal with money or budget expenses;* or

◆ *create new ideas.*

As an alternative, you might generate discussion by providing learners with a list of transferrable skills and asking them to indicate which skills they:

◆ think they have;

◆ like to apply; and

◆ need to improve.

Identifying Preferred Learning Styles

Although learners do not usually think about how they learn best, they do have some awareness of how they prefer to learn. Becoming aware of their dominant learning style can help learners to maximize their learning opportunities. It can also help instructors to plan and prepare appropriate and effective instruction and learning materials.

For example, some learners prefer to learn on their own, rather than in groups. For such learners, a preferred learning situation might be working with self-study modules at their own pace and having instructors who provide feedback when requested.

Once students understand how they learn best they are empowered to become more self-initiating and directing, to 'rescue themselves' when stuck and to purposefully establish ways to develop their full learning potential.[16]

According to James and Galbraith (1985) there are seven primary learning styles, including:

◆ Print: the preference of the reader or writer who learns well from traditional texts and pencil and paper exercises.

◆ Visual: the preference of the observer who likes to look at slides, films, videos, exhibits, demonstrations, and charts.

◆ Aural: the preference of the listener who enjoys lectures and who also learns well from tapes and records.

◆ Interactive: the preference of the talker who learns best from discussions and question-and-answer sessions.

◆ Tactile: the preference of the toucher or handler who wants hands-on activities and who also learns well from model building or sketching.

◆ Kinesthetic: the preference of the mover who likes role playing and physical games and activities; and

◆ Olfactory: the preference of the smeller or taster who associates learning with smells and tastes.[17]

Pfeiffer and Goodstein (1984) further describe learners by their attitudes with respect to learning. They categorize learners as dependent, collaborative or independent. These categories are based on how much the learners rely on a trainer or instructor to learn new tasks or acquire new information.

Using learning style instruments

Literacy practitioners often use instruments, such as learning style inventories and checklists, to assess a learner's preferred learning style and determine how a particular learner receives and processes information most effectively.

The important thing is not our ability to categorize people ... The important thing is to get a concrete picture of how they learn best.[18]

Using these kinds of tools, in addition to the learners' anecdotal information, will help you and the learners to identify how they prefer to learn, solve problems, and deal with various learning situations.

For example, Brooks (1986) has developed a tool to determine when people are mental, relational or physical learners. Mental learners are highly focused, objective and prefer to work in a solitary manner. These learners prefer to learn from ideas, theories, and data rather than from other people and actions.

Relational learners like to interact with others in their learning process. They are responsive to open and relaxed environments which promote the exchange of ideas and feelings.

Physically-centred learners learn best by doing. These learners prefer to watch someone perform a task and then to practice and repeat the same task at their own pace.

The recently published *Common Assessment of Basic Skills (CABS) Manual* (1995) provides learning style checklists to help determine which routes to learning a learner prefers:

◆ visual (learning by seeing);
◆ auditory (learning by hearing); or
◆ kinesthetic (learning by doing).

The checklists also have learners determine if they prefer to learn in a group or on their own.

....

Sue Adams, Coordinator of the Ontario Basic Skills (OBS) Program at Sheridan College in Oakville, believes that being aware of their preferred learning style can help learners get more out of a learning situation. This is particularly true in learning situations which do not offer learners their preferred learning tools and approaches.

....

Using Brooks' categories as an example, when learners are aware that they prefer to interact with others in their learning process, they are better able to adapt to a training situation which requires another learning style.

As different situations require different learning styles or a combination of styles, you may tell learners that identifying their preferred learning style does not preclude strengthening other ways to learn new information.

Discussing Obstacles, Challenges and Required Supports

It is important to ask learners to identify obstacles or challenges which may affect their participation in training or retraining programs. These challenges might also affect their achievement of other goals. You and the learners will need to discuss the supports which they might require to overcome potential obstacles.

Focusing on logistical obstacles

As a first step, focus on logistical obstacles, such as transportation, child care, or special needs. For example, you might mention the transportation or child care allowances available for learners participating in some adult literacy programs.

Likewise, when a learner requires wheelchair-accessible facilities, you might contact potential training providers or employers to ensure that they have those facilities.

....

In assessing unemployed learners in small communities, Kristen Gunn, a former Workplace Literacy Coordinator in Sudbury, considers relocating as a key issue. She finds that learners who are clearest about future goals are the most willing to relocate for training and employment. Learners opposed to relocating are the least able to decide on career goals. Their primary goal is to do whatever is necessary to keep from moving.

....

For many learners, time and financial constraints will often influence their decisions regarding training, new jobs, and broader personal goals. For example, some unemployed learners may want to attend training programs which continue beyond the income support provisions of their Employment Insurance.

In these instances, you should discuss possible options, such as loans from family, friends, or the Ontario Student Assistance Program (OSAP). Learners should also be aware that many educational institutions offer scholarships, bursaries, and work-study programs to ease students' financial burdens.

Focusing on more sensitive issues

Continue the discussion by encouraging learners to talk about other potential obstacles to reaching their goals. These obstacles might include problems with self-esteem, health, or support from family, friends, supervisors, and other workers.

However, when you learn, or have reason to believe, that a learner has a medical, psychological or personal problem, or a learning disability, you should refer the learner to an appropriate professional for diagnosis. In other situations, it might be adequate to refer learners to support groups or services which are available for people in their particular situations.

Furthermore, learners may talk about other concerns, such as resumé counselling or the need to improve their study skills or work habits. For these learners, you might discuss the wide range of employment and academic counselling services available from local school boards, colleges, universities, labour organizations, and social service agencies.

In your first meeting, time will determine the extent to which you and a learner are able to deal with obstacles, challenges and required supports. If you do not have specific and complete information on hand, you and the learner may take the time between the first and second meetings to continue researching required resources and supports. The regional literacy network in your area will be a valuable source of information.

Completing Step One of the Goal-Directed Assessment Process

At the end of the interview, review your notes with learners. Ask them if they would like to include anything else about their backgrounds. You should remind them that you will be summarizing the information on their individualized training plan and giving them a copy at the end of the assessment process.

Working with the Case Study

In the next section of this chapter, you will read a description of Step One of the goal-directed assessment process 'in action.'

You will be reading an account of how Bina, a workplace literacy coordinator, and Gloria, a laid-off worker, worked together to collect background information about Gloria's:

- ◆ education;
- ◆ work history;
- ◆ transferrable skills;
- ◆ preferred learning style; and
- ◆ obstacles, challenges, and required supports.

CASE STUDY

Gloria's and Bina's First Meeting

When Gloria phoned Bina, the workplace coordinator, she learned that the assessment would take two sessions. The first session would last about three hours and the second, about half an hour. Bina suggested that Gloria bring along her academic transcripts and any certificates for courses taken outside of school. She also encouraged Gloria to think about her future goals.

Gloria and Bina met for the one-on-one interview

Gloria seemed somewhat guarded when she appeared for her first session. To put Gloria at ease, Bina greeted her warmly and invited her to help herself to coffee, tea or juice. While Bina collected the papers for their meeting, she cheerfully showed Gloria the 'Wall of Success,' a display of previous learners' photos and success stories. Gloria seemed relieved to see that other learners, like herself, had achieved their goals despite difficult times.

As Gloria filled out the personal information section of an interview form, Bina assured her that the interview was entirely confidential. She stressed:

"Your role is very important. I am going to be asking you a lot of questions and taking notes as we speak. I want you to feel that you can talk freely and ask me questions at any time."

As it turned out, Gloria had prepared a list of questions which she wanted answered. Looking at her list, she asked Bina:

"Can you tell me a little about what will happen at these meetings? Will they help me get a job?"

Bina explained the Goal-Directed Assessment Process to Gloria

Sitting beside Gloria, Bina talked about goal-directed assessment:

"The purpose of this activity is two-fold ... to identify suitable goals and then come up with a realistic plan to meet those goals. Your goals can be related to work, education, or any learning goals you might have."

Bina explained that they would be looking at Gloria's background, interests and aptitudes, current abilities, and the skills she needed to reach her goals. To the extent that she was comfortable, Gloria would participate in interviews and discussions, take tests, fill out questionnaires, and do some writing. Bina assured Gloria:

"We will focus on your strengths and accomplishments, not on the skills you don't have."

Bina explained that a goal-directed assessment would give Gloria a strategy so that she could prepare to get another job or take specific training to re-enter the workforce. Bina went on to say:

"Together, we will come up with an individualized training plan. It will detail where you are now, what you want to do, and what you have to do to get there. You'll be able to use the training plan to make informed decisions. Let's get started by discussing your educational history. Gloria, what was the last grade you completed?"

Gloria's Educational History and Strengths

"I dropped out of school before I finished grade 11. Having a high school diploma didn't seem to matter then."

When asked why she left school, Gloria explained that, throughout high school, she had worked part-time as a sales clerk at a local gift shop. The shop owners were so pleased with her work that they offered her a full-time job in the office. She told Bina that the thought of a regular paycheque had convinced her to quit school.

Gloria described her high school experiences

Reading Gloria's transcripts, Bina saw that Gloria had grade 11 credits in advanced-level math and general-level English. Bina commented:

"Your math grades were very good. Was math your favourite subject?"

Gloria told Bina that she had liked math the best and that she had particularly liked her grade 11 accounting course. She spoke freely about her other subjects:

"English was okay, but my grades were not that great. My essays always came back with spelling mistakes. And I failed grade 11 science. All those words and definitions ... I just couldn't understand them."

When asked if she had liked school, Gloria mentioned that she had liked some parts of school, but had often felt unmotivated to learn without any specific goals in mind. When Bina asked Gloria to assess her overall performance as a student, Gloria lowered her eyes:

"Looking back, I know I could have done better. Especially in my last year I skipped a lot of classes. I guess, at sixteen, I just had other things on my mind."

Bina inquired if Gloria had felt comfortable when learning in a classroom situation. Admitting that she disliked being the 'centre of attention,' Gloria said that she had always felt anxious when the teacher called on her to answer a question. She added that classroom noise had made it difficult for her to complete assignments.

Gloria recollected learning outside of school

Gloria was asked to talk about any training or courses she had taken outside of school, such as work-related training, upgrading, or general interest courses. She was also encouraged to mention specific skills or knowledge that she had acquired outside of work.

Gloria showed Bina a certificate from an after-school language program in which she had learned to speak and read Italian. Gloria explained:

"I remember how much I enjoyed those classes. In fact, it was the only time I didn't feel nervous when I had to speak in front of everybody."

Gloria added that she had taken a First Aid course in home emergency procedures four years ago. She had also participated in several health and safety seminars at her last workplace.

Gloria remarked that she had enjoyed these learning experiences the most. When Bina asked her if she knew why, Gloria shrugged and replied that what she had learned seemed to be useful in her everyday life. She smiled and added:

"It also helped that I went to *all* the training sessions and asked questions when I didn't understand something."

With respect to the specific things she had learned to do outside of work, Gloria said that she had recently taught herself how to build bookshelves for her children.

Then Bina directed the discussion toward Gloria's work history:

"Now we're going to be discussing what kinds of jobs you've held, what you liked or disliked about them, how long you worked in each job, what you did and what skills you developed. These can be paid or unpaid jobs. Let's begin with your first work experience."

Gloria's Work Experience and Strengths

"I got my first job when I was 14. I was a part-time sales person at Voula's Gifts. Then the owners promoted me to help the bookkeeper on a full-time basis."

When asked about her responsibilities and duties, Gloria said that, as a sales clerk, she had looked after customers and handled cash and credit cards. She had also done the window displays. As an office assistant, her duties had involved calculating, issuing and preparing bills and invoices, and assisting with the payroll for approximately six employees. She had performed other duties, such as filing, ordering supplies and typing.

Bina asked her if she had liked working at Voula's.

"I liked the job and the people a lot. I was really hoping that I would be doing office work there for a long time. But the owners retired after I had been working in the office for only five years."

Gloria detailed other work experiences

Gloria continued by telling Bina that her next job was at Jokinen's Gift Wholesalers, where she stayed for six years as a warehouse clerk. Her primary duties were in shipping and receiving ... packing boxes, filling out packing slips, and keeping track of orders.

Bina asked Gloria if she had acquired any new skills while working in the warehouse.

"The warehouse work was pretty boring. I learned a little about inventory control procedures for a large company, but not much more. That's part of the reason why I left. But, the main reason was that, with day care costs, I wasn't really making any money. So, I decided to be a stay-at-home mom. That's also when I began to help out at my kids' school. Another parent asked me to be in charge of cash at bake sales and raffles ... I'm still doing that."

Gloria admitted to Bina that when she had decided to go back to work four years later, finding a job was more difficult than she had expected. After an exhaustive and discouraging search for office work, Gloria had accepted a job as an assembler at Lucky's Manufacturing.

When asked to talk about her work at Lucky's, Gloria described the workplace as high-pressure. She had had to learn new processes quickly, follow instructions accurately, and do her work without any mistakes. Bina remarked:

"That sounds pretty challenging. Do you think you did your job well?"

Although it had often been difficult to meet the production quotas, Gloria proudly told Bina that she had surpassed the quota on three occasions. However, she admitted:

"I didn't really enjoy assembly-line work because it was repetitive and I often had to work shifts. What I liked best about working at Lucky's was

when I got to be an interpreter in the orientation sessions for new Italian-speaking employees."

Bina remarked that Gloria's experience in interpreting was a transferrable skill ... one which she could use in other situations, such as in the community or at work.

"Nowadays many employers are just as interested in your transferrable skills as in your specific job-related skills. For example, your ability to interpret, organize events, manage time or handle detailed work ... you can learn these skills in one situation and then apply them to another."

Gloria's Transferrable Skills

Bina helped Gloria to identify a number of her other transferrable skills. Recalling Gloria's work history, Bina first asked her to talk about situations in which she had had to deal with money or budgeting. Gloria joked that she'd been 'keeping books in one way or another since I was 17.' She beamed with pride:

"Even people at work used to be surprised that I could do my own taxes. Some even asked me to help them with theirs."

Gloria added that, as a volunteer at her children's school, she handled all cash transactions at raffles, bazaars, and bake sales and also kept the records. She told Bina:

"I guess I'm pretty good at making ends meet. For the past three years I've had to make my paycheque stretch ... a lot."

Bina commented that Gloria's experience with manual accounting and inventory control indicated that she was probably very detail-oriented, accurate and neat.

When asked about activities in which she had organized or coordinated people or events, Gloria referred back to her work at her children's school. She also mentioned that she had helped out with the health and safety seminars at work by booking classroom space, preparing seating plans, and arranging for the box lunches.

Bina asked Gloria if there were situations outside of her assembly-line job when she had worked with machines. Gloria responded that, at home, she was always attempting do-it-yourself projects, such as fixing broken appliances and making minor household repairs. She liked using small electrical tools, such as drills and power sanders. And, in her office jobs, she had used business machines, such as calculators, adding machines, and typewriters.

In response to Bina's question about her ability to manage time, Gloria laughed and exclaimed:

"Any single mother who is active with two young kids, volunteers two times a week, works shift work and still maintains an excellent attendance and work record, should get a diploma in time management!"

Bina laughed and told Gloria:

"I think we now have a good idea of some of your transferrable skills. You may want to build upon these skills as you set future work and learning goals. Now, let's continue by looking at how you like to learn new things."

Gloria's Preferred Learning Style

Bina decided to use a learning style checklist and anecdotal information to determine Gloria's preferred learning style. She began by explaining to Gloria:

"Although we learn new skills and ideas in many different ways, we usually have preferences about the way we learn these things. Learners

often find that knowing how they like to learn best helps them to get the most out of a learning situation."

Gloria filled out a learning styles checklist which revealed that she preferred to learn visually. For example, when she learned something new, she liked to see it in print, write it down, or picture it in her head.

When asked if she preferred to learn in groups or independently, Gloria answered that she liked independent work more. She felt that she learned best when she received instruction, read texts on her own, and then concentrated on specific problems. She liked to receive help only when she asked for it.

When asked how she liked to learn new tasks at work, in particular, Gloria stated that she preferred to learn on her own and at her own pace. She complained about one negative experience with her work-related training.

"My supervisor was showing me how to use a new machine. I think I was having trouble catching on because he was going too quickly and there wasn't even a diagram to look at. Even when I do minor repairs at home, I need to be looking at a manual or an instruction sheet."

Bina explained that, in many situations, people are not able to choose the methods or materials from which they learn.

"It's a reality. You need to be able to adapt to whatever is available, which is easier when you know what works best for you."

Obstacles, Challenges and Supports for Gloria

Bina explained to Gloria that learners often have obstacles or challenges which may make it difficult and, at times, even prevent them from participating in learning programs. She explained that

Gloria could talk about anything which she felt might be a barrier to her taking part in a training program or finding a job.

Bina mentioned that obstacles might include things, such as time and financial constraints, transportation to and from learning programs or child care. Carefully, she added:

"Some learners also have problems with their health or in their personal lives which could make it more difficult for them to focus on reaching their goals. I hope you'll feel free to talk to me about any of these things. Remember that what we discuss is entirely confidential."

Gloria said that, to her knowledge, she didn't have any health or personal problems which could affect her learning. But, with a furrowed brow, she said to Bina:

"The thing I worry about the most is my financial situation. I really want to get a good job … one that pays well and has a future. And I think that means I'll have to go back to school. I'm not sure if I'll have enough time or money to finish a program once I start it. After all, my Employment Insurance benefits run out in another 37 weeks."

Gloria went on to say that she was in the process of selling her car, so any program she attended would have to be on a bus route. She also explained that she would have to finish school by 2:30 each afternoon to pick up her kids at school. Evening or weekend classes would also be difficult, as she could not afford to pay babysitters.

Bina began to address some of Gloria's concerns

"Most learning programs have day classes, but realistically, you might not be able to leave at 2:30. However, many programs offer learners child care allowances. Some also help learners with transportation costs."

Bina wanted to address Gloria's most pressing concern about her financial situation and the time she had left before her benefits ended. Bina reminded Gloria that during the rest of her assessment, they would be identifying Gloria's goals and the kind of training needed to reach them. Then they would have a better sense of how much time and money would be required. However, Bina added:

"If it appears that you need more than 37 weeks to upgrade your skills or retrain, we could talk about student loans and bursaries or financial support from your family or friends."

Gloria continued and told Bina that being out of work had left her feeling insecure and embarrassed. She explained that, since the plant closure had been announced, she had lost a great deal of confidence in her abilities.

Bina reassured Gloria by explaining that her feelings were common among people in her situation:

"For many unemployed learners, I've found that setting goals, drawing up a plan of action and carrying it through can help. You may find that once we finish this assessment process and get you on the road to a new job, you'll regain some of your confidence and feel better about the future."

She also told Gloria about the support that she could find from participating in various groups, such as JobFinders clubs or those set up by other laid-off workers to help deal with issues around unemployment.

Gloria admitted that she wasn't very interested in being a part of a group. So Bina mentioned that a number of community-based agencies in the city offered one-to-one consultations with staff or had peer counsellors. Bina smiled and concluded:

"If you'd like, I'd be happy to link you up with any of these organizations. Just let me know."

Gloria and Bina Wrapped Up Step One

At the end of Step One, Bina reviewed with Gloria what had happened during this part of their meeting. She indicated that, at the end of their meeting, she would be summarizing their discussion on page one of Gloria's individualized training plan.

Having completed Step One of the goal-directed assessment process, Gloria seemed more relaxed. She appeared eager to move on to Step Two, identifying long- and short-term goals.

Now It's Your Turn

Using your own initial interview form, gather background information about a potential adult literacy learner. Include information about the learner's:

◆ educational background and strengths;

◆ work experience and strengths;

◆ transferrable skills;

◆ preferred learning style; and

◆ obstacles, challenges and required supports.

You will be summarizing this information on page one of the blank individualized training plan form included in Appendix One. You might find it helpful to use Gloria's training plan as a guide.

Page 1

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Personal Information

Name Gloria Macri
Address 1000 Main Street, Apt. 6
Thunder Bay, Ontario P7C 4N1
Telephone (807) 845-0000
Additional

General Information

Date of Assessment May 30, 1997
Assessor Bina Kapoor
Company Lucky's Manufacturing
Location Thunder Bay, Ontario
Additional E.I. - 37 weeks remaining

Background Information

Educational Experiences and Strengths

- Completed grade 10 - grade 11 credits in advanced-level math, general level English and accounting level math, general level English and peer grades in English and science
- Excelled in math overall; peer grades in English
- Certificates for after-school language program in Italian; First Aid course in home emergency procedure
- Health and safety seminars at last place of work

Work History and Strengths

- PT sales clerk at gift store (2 yrs.) handled cash/credit cards/cust service/display
- FT office assistant at same gift store (5 yrs.) bookkeeping/payroll/ordering supplies/typing
- FT warehouse clerk at gift wholesaler (6 yrs.) shipping and receiving/inventory control
- FT assembler at manufacturing plant (3 yrs.) assembled products/interpreter for Italian-spkg. empl.
- Overall strengths: works well independently and with others, dealing with money and records. Enjoyed working in office environment and interpreting Italian.

Transferable Skills

- Dealing with money, budgeting, handling detailed work
- Organizing and coordinating events
- Managing time
- Working with small and mid-sized machinery and equipment

Preferred Learning Style

- learning independently and at own pace
- Visual learner overall, learning best from diagrams and print material

Obstacles and Challenges

- Only 37 weeks of E.I. remaining
- Has two school-aged children - needs daytime/weekday programs - no vehicle
- lowered self-esteem due to unemployment

Required Supports

- Financial assistance - Childcare allowance
- Program accessible by public transit
- Transportation allowance
- unemployment counselling

Assessor's Signature
Learner's Signature

Step Two: Identify Possible Long-Term and Short-Term Goals

Input To begin Step Two, you will need:

- ◆ relevant background information about a learner's education, work history, transferrable skills, preferred learning style, obstacles, challenges, and required supports.

Process In this chapter, you will learn how to:

- ◆ deal with a variety of goal-setting situations;
- ◆ use the background information gathered during Step One to help learners identify suitable and attainable goals;
- ◆ provide learners with accurate information to set goals; and
- ◆ help learners to set goals.

Results At the end of this chapter, you will be able to:

- ◆ work with learners to identify specific and realistic goals for the long and short term.

Identifying Suitable and Attainable Goals

*I*n the goal-directed assessment process, you and the learners focus consistently on finding realistic long- and short-term goals for their vocational, educational, and personal lives. All interviewing, rapport building, discussion, interaction, information exchange, and testing are done with this focus in mind.

....

For Dr. Hilroy Thomas, Senior Policy Analyst with the Prior Learning Secretariat, the learners' goals are key to the assessment process. "You need to look at the larger picture ... right from the start."

....

During Step Two of the goal-directed assessment process, an essential part of your role will be to provide learners with the accurate information and direction needed to set goals which are specific, measurable, meaningful, and attainable within a realistic time frame. You will:

◆ present the benefits of setting clear and realistic goals;

◆ use the background information gathered during Step One to guide your discussion;

◆ help learners to identify specific vocational, educational and personal goals for the long and short term; and

◆ discuss specific time frames and steps required to reach those goals.

You should also discuss the ongoing and evolutionary nature of goal setting. Learners need to know that they can modify or change the goals which they identify during their initial assessment. Furthermore, as learners progress through a learning program, they should be reviewing their goals regularly and updating them, if necessary.

Using the background information gathered in Step One

The information which you gathered during Step One of the goal-directed assessment process, such as relevant details about a learner's past work and educational experiences, various skills, interests, and aptitudes, will help to guide and shape the goal-setting process. For example, you might ask questions, such as:

Ask the learner
- *Based on your work history, I see that most of your jobs have been in the carpentry field. Do you see yourself continuing to work in this area?*

- *You mentioned that you liked working with people from different backgrounds. Would you like a job with a lot of people contact?*

- *When we discussed your transferrable skills, you said that you liked to organize and coordinate people. Would you like to move into a supervisory position in this organization?*

- *You mentioned taking several computer courses at night school. Would you consider working towards a certificate or diploma in this subject area?*

A Variety of Learners and Goal-Setting Situations

The task of identifying suitable and attainable goals may seem overwhelming for some learners, especially learners at the lower levels. At the outset of a goal-directed assessment, they may find themselves feeling confused and 'at sea' with only a broad notion of how to identify possible training, educational, or personal goals.

In other situations, learners may have a vague idea of possible goals, such as 'working with computers' or 'just reading better.' Some learners may come to a goal-directed assessment with a specific goal in mind—only to discover that it is unrealistic, at least in the short term.

For Brenda Ciesarik, former Western Ontario Regional Workplace Literacy Coordinator, when a learner's goals are vague, one of the assessor's primary jobs is to focus the learner toward choosing specific and realistic goals.

However, for the most part, learners in literacy programs will have some idea of their own strengths, skills, training needs and career preferences. This awareness, highlighted by the work they did during Step One of the goal-directed assessment process, will help them to begin to identify vocational, training, or personal goals.

Some learners may come to an initial assessment with clearly defined goals and only require information about how to achieve them. Yet, even when a specific goal appears already defined, the learner may have decided on the goal without a clear understanding of the actual expectations and duties of the position or in the required training which precedes it. (Ever changing technology makes accurate job descriptions quickly obsolete!).

As with a learner who has little or no awareness of a goal, your job would be to provide a clear and cogent picture of the specific goals by asking questions to validate the goal, such as:

Ask the learner

◆ *How did you choose the particular goal?*

◆ *For how long has it been a goal?*

◆ *What experiences have helped you to formulate your goal?*

◆ *What do you know about the preparation required for this goal?*

During such questioning, if it were to become evident that the learner's goal does not have a solid foundation, your questioning would revert to a more generic strategy. You would follow the same type of process as when a learner could not articulate a goal.

Goal Setting Is Complex

A number of other factors affect a learner's ability to set suitable and attainable goals, such as time and financial constraints, the learner's priorities, the current labour market, and the availability of retraining opportunities.

Ideally, you should allocate a minimum of thirty minutes for Step Two of the goal-directed assessment process. However, the reality of goal setting is that learners may need more time to set vocational, educational, and personal goals for both the long and short term.

Depending on the literacy ability of the learners, some assessors have learners independently research information concerning their goals by reading books and course calendars, accessing on-line data, and conducting telephone or personal interviews. Furthermore, once enrolled in an upgrading program, learners are often given time to conduct goal-related research.

....

Unemployed learners at the Peel Adult Learning Network (PALN) in Mississauga often identify goals as part of their training program. Coordinator Phyllis Sereda has learners work on individual research projects to identify where jobs are available and what training is required to get those jobs.

....

Once again, your role is key during Step Two of the goal-directed assessment process. By linking with education and training providers and resources in your community and by understanding the current labour market, you can provide learners with the comprehensive information they need to set suitable and attainable goals.

In workplace contexts, you should also be aware of the dynamics of the organization as a whole and any potential changes in the work environment.

Issues for unemployed workers

When learners are unemployed, they are often anxious. Understandably, their main concern is to re-enter the workforce. In situations where learners need vocational skill training to get another job, you need to present the skill training as a short-term goal leading to a longer-term goal of getting back to work.

Despite the urgency of an unemployed learner's current situation, it is important for the learner to understand the value of setting broader personal, educational, and vocational goals in support of a future of lifelong learning.

Hynes (1995) mentions that many factors influence the decision-making process when an unemployed learner selects a particular skill-training program or job as a goal. Availability of jobs or skill training programs, economic status, past work experience and the time limits of their Employment Insurance may all play key roles.

For example, a learner might decide not to retrain in a particular field when research indicated that jobs in that occupational area would be scarce. Or a learner might decide against taking a specific program at an educational institution if it were to continue after Employment Insurance benefits ended.

Issues for employed learners

When identifying specific goals, employed learners have to consider both the work-related needs of the organization as a whole and their personal needs for self-improvement and lifelong learning. For this reason, you and the learner may need to discuss the convergence or divergence of organizational and personal goals.

For example, shared goals, as identified by a workplace needs assessment, may include upgrading the learners' basic skills to:

◆ improve performance in their current jobs;

◆ tackle new job tasks and responsibilities;

◆ survive organizational or technological change; and

◆ increase their potential for advancement.

....

… recent experience in the field suggests that such multiple goals are a valid expression of the complex stakeholder interests represented in most workplaces. This new thinking sees these varied goals not as contradictory and mutually-exclusive but as potentially mutually-reinforcing focal points for learning. [20]

....

However, when individual and organizational goals diverge, you will need to present the learner's current situation as the basis for a short-term goal while also exploring the learner's goals for the future.

....

According to Brenda Wall, Labour Educator, when personal and organizational goals differ, the challenge is to convince the organization about the positive link between the employee's personal goals and those of the organization. She also believes that an employee's personal goals should always be the centre of the initial assessment in any workplace education program.

....

Setting Long-Term and Short-Term Goals

Learners will need to break down their broader goals into long-term and short-term goals. Long-term goals can usually be accomplished in two to five years and short-term goals, in under two years.

As an assessor, you should convey the importance of setting both long-term and short-term goals within the context of a learner's work, educational, and personal lives. Understanding this distinction is particularly crucial for basic-level learners for whom a long-term goal can often seem too distant or even impossible to reach.

Craig (1994) recommends telling learners how the specific goals which they identify during an initial assessment will shape their training or retraining program.

To guide the goal-setting discussion, you might ask the learner specific questions, such as:

Ask the learner
- *What would you like to achieve in six months? two years? five years?*
- *What skills or knowledge do you think you need to get there?*
- *How would you get those skills or knowledge?*

In workplace contexts, you might ask the learner specific questions, such as:

Ask the learner
- *What skills do you think you need to do better at work now?*
- *How do you think your job will change in the future?*
- *What skills or knowledge will you need then?*
- *How could you get them?*

....

Hilke Grunys, Northern and Western Regional Workplace Literacy Coordinator, asks learners to look at three categories of goals: long, medium and short term. Learners look at long-term goals as building on the successes of goals for both the short and medium term.

....

As learners begin to set long- and short-term goals, it is important to review the information you acquired in Step One about obstacles which might stand in their way. You will also want to discuss possible ways to deal with these obstacles.

Exploring the notion of long-term goals

In identifying a long-term goal, learners must consider a number of other issues. For example, when a learner has identified a new career as a long-term goal, you might discuss:

◆ the compatibility of a specific occupational field or workplace;

◆ the additional education required; and

◆ any foreseeable life changes, such as dependents leaving home, opportunities for advancement at work or the ability to attend school on a more full-time basis.

You may also want to discuss the learner's values, such as the importance of security or financial stability, a willingness to be mobile, and opportunities for advancement or leadership. For example, in jobs where low salaries are the norm, such as in the child care profession, it might be helpful to confirm the importance that a learner places on salaries and financial security.

In workplace settings, you and the learner will need to examine and compare the goals of the organization as a whole with the long-term personal and career goals of the individual learner.

You might guide the discussion by asking questions, such as:

Ask the learner ◆ *Do you see yourself advancing or taking on new responsibilities in this organization? If so, what new skills, knowledge and abilities do you need to acquire? How would you go about acquiring these skills?*

◆ *Do you want to do different tasks at work to increase your sense of satisfaction from your job?*

◆ *Would you like to change or develop yourself? How would you like to achieve that goal?*

The anecdotal information gained may help the learner to discuss long-term goals when opportunities within the company or organization are extremely limited.

Exploring the notion of short-term goals

Short-term goals in all contexts have a sense of urgency and are geared to re-establish equilibrium in the learner's life. The goals are designed to improve a learner's current economic or employment status. Learners should be able to see where their short-term goals lead with regard to career stability and how those goals will continue to affect their personal and working lives for years to come.

During Step Two of the goal-directed assessment process, you should continue to highlight the notion that short-term goals will have long-term value. They are the first steps to the learner's longer-term goals.

For an unemployed learner, a short-term goal may be entry to further education or skill training. For an employed learner, short-term goals usually help when dealing with work-related issues, such as a shift in work responsibilities and job tasks, a sudden disruption from a familiar position or the possibility of future job promotion or job loss. However, in both contexts, a learner's short-term goals may also be of a personal nature, such as learning how to complete income tax returns or learning how to use a word processing program.

When language or academic skills are at a basic level and a large gap exists between the learner's current skills and future aims, the short-term goal must focus on developing the learner's fundamental language or academic skills.

Using Vocational Counselling Tools

A learner's vocational aptitude and interests should play an important role in setting both long- and short-term goals. Although Step One of the goal-directed assessment process will give you much information about a learner's leanings, vocational counselling tools, such as the *Strong Interest Inventory* or the *Career Assessment Inventory*, can be very helpful. These instruments can confirm a learner's goals, present ideas for discussion, or provide a place to start.

Vocational counselling tools give you a profile of the learner's interests and aptitudes (which are related but not identical) and offer a fruitful base from which to discuss suitable and attainable goals. Due to time constraints, such tools may be administered once a learner has begun a learning program.

Career exploration packages used in vocational counselling, such as *Discover* and *Choices*, can also help a learner to develop both long- and short-term goals.

Use the links you have established with training providers in your community to offer such formal vocational counselling to learners.

Although an abundance of vocational counselling tools is available, Hynes (1995) warns of the gender, class, and educational biases inherent in many of the tools which may make taking the test an alienating experience for the learner.

....

... Where the majority of workers are second-language speakers or are native speakers of English with low literacy levels, many traditional vocational counselling instruments have severe limitations. They require fairly high literacy levels and simply completing the assessment is an intimidating, time-consuming task.[21]

....

Furthermore, many practitioners question the ability of such specialized instruments to predict whether learners will perform successfully in retraining or on the job to warrant the additional time, expense, and training they require.

Integrating vocational assessment activities

Rather than depend solely on vocational assessment tests, you may opt for integrating parts of vocational assessment in a learner's instructional program. For example, a learner who had aspirations to advance to a supervisory position might arrange to talk to and then shadow a current supervisor. Or the learner might research information about the organization, including typical career paths and required skills for handling specific jobs.

Similarly, a learner who had post-secondary education as a goal might arrange to audit a couple of classes at a local community college. Or the learner might make an appointment to talk to a college counsellor.

Completing Step Two of the Goal-Directed Assessment Process

At the end of Step Two, you and the learner will confirm the vocational, educational and personal goals identified for the long and short term. Should the learner need to investigate her or

his goals further, you should provide the appropriate contacts and resources.

Working with the Case Study

The next section of this chapter shows Step Two of the goal-directed assessment process 'in action.'

As you continue to read about Gloria and Bina, you will observe how they went about identifying Gloria's long- and short-term goals.
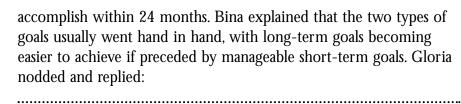
CASE STUDY

Gloria's Long-Term and Short-Term Goals

When Bina directed the discussion to Step Two of the goal-directed assessment process, she wasted no time alerting Gloria to the specifics of goal setting.

Gloria and Bina discussed the advantages of setting clear and realistic goals. Based on her experience, Bina explained that learners who had set clear and realistic goals were more motivated and more likely to achieve their goals. She added:

••

"For the next half hour, we're going to be talking about your future. We'll talk about what you want to do in your work, education, and personal life over the short and long term. We'll also begin to discuss what you need to do to get there."

••

Bina explained that they would be discussing Gloria's long-term goals ... what she wanted to achieve within two to five years. They would also discuss Gloria's short-term goals ... what she wanted to

accomplish within 24 months. Bina explained that the two types of goals usually went hand in hand, with long-term goals becoming easier to achieve if preceded by manageable short-term goals. Gloria nodded and replied:

....

"In the past, I never looked too far ahead. It always seemed so overwhelming to me. I never made long-term plans in case I couldn't complete them. Maybe if I had broken things down into smaller bits, it would have helped."

....

As she spoke, however, Gloria's expression seemed to change. Bina asked her if she had any concerns and Gloria replied:

....

"What happens if I set a goal and then can't meet it? What if something happens? What if I just can't do it?"

....

Bina assured Gloria that setting goals now did not mean that the goals had to stay the same. She went on to say that since situations and lifestyles often change, it would be important for Gloria to review her goals every three to six months.

Gloria's background information was revisited with a focus on her future

Bina continued by explaining that they would be looking at what was discussed during Step One of the assessment … Gloria's skills, knowledge, interests, and strengths. They would review what Gloria liked to do, what she did well and what skills she could build upon to accomplish future career, training and personal goals.

As Gloria's main concern was finding a well-paying and satisfying job as quickly as possible, the discussion focused on Gloria's vocational and educational goals first. Using Gloria's background information as a guideline, Bina proceeded:
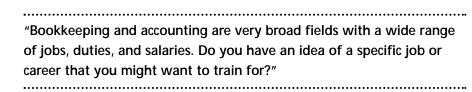
....

"From what you've told me, your vocational interests and strengths seem to lie within a few areas. Both at work and in the community,

you've done a lot of math-related activities … budgeting, inventory control, bookkeeping … those sorts of things. And more recently, you've worked with groups of people from all walks of life. You also liked using your knowledge of Italian. Do you see yourself using any of these skills for work now or in the future?"

After some thought, Gloria replied:

"It's true … I like people … and I really liked it when I used my Italian to help people at work. But what comes to mind first is how much I liked working in an office, especially when I did bookkeeping, invoicing and things like that. I guess I like working with money. At one time, I even thought about going to night school for bookkeeping, but I couldn't go then."

Bina remarked that the bookkeeping and accounting fields were growth areas in today's marketplace. She mentioned that there were job opportunities in a variety of environments and in virtually all industries. She also stated that many companies had learning programs to help people continue their education and advance. Gloria seemed glad to hear this information and added:

"I've also heard that jobs in accounting pay very well. That's really important to me and my family. And, I like the idea of working regular hours. When I helped the bookkeeper at the gift store, I liked knowing that I'd finish at 5:30 every day."

Gloria's remark about salary expectations concerned Bina because it seemed somewhat unrealistic. Looking up salaries in her *Job Profile* binder, Bina cautioned Gloria:

"Your first job will probably be at entry level where salaries could be around $20,000. But, with more experience, you might be able to earn as much as $40,000 a year. Also keep in mind that second languages, like Italian, are valuable to employers in today's workplace."

Gloria's face brightened at the prospect of using her second language in other ways.

Gloria and Bina discussed vocational options

To focus the discussion further, Bina continued:

....

"Bookkeeping and accounting are very broad fields with a wide range of jobs, duties, and salaries. Do you have an idea of a specific job or career that you might want to train for?"

....

Gloria shrugged slightly and shook her head. She admitted that she was uncertain about all possible jobs in those fields. She was certain, however, that she wanted to build on her past office experience, even though it had been a long time ago.

To help identify specific job options, Bina gave Gloria a copy of one of her resources listing numerous vocational areas. She asked Gloria to look at the specific occupations listed under *Accounting and Related Clerks* and to select possible jobs that she might like to have. Without hesitation, Gloria selected 'Accounting Clerk,' 'Payroll Clerk,' and 'Bookkeeper' as possible areas of interest. She smiled and told Bina:

....

"It might sound funny, Bina, but I've even thought about running my own bookkeeping business out of my house. I guess that would be my long, long, long-term goal, especially since I'd have to buy the house first!"

....

Bina agreed that these aims may indeed be very long-term in light of Gloria's present situation. However, Bina implored Gloria not to lose sight of these long-term goals. She continued by explaining:

....

"We can do some planning so that you could be working toward your long-term goals while you are meeting your short-term goals. For example, while you are in a learning program, you might read some self-help books or attend low-cost seminars about running home-based

businesses. First, we'll have to get a good idea of how you'll meet your most pressing need to get a more meaningful job."

....

Together, Bina and Gloria looked at the general descriptions and requirements for 'Payroll Clerk' and 'Accounting Clerk.' They learned that 'Clerks' are usually required to take courses beyond the secondary-school level.
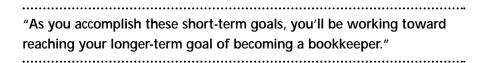
Bina and Gloria also read that 'Clerks' were able to advance to supervisory or skilled positions, such as 'Bookkeeper' if they received more training and experience. Gloria sighed and commented:

....

"Well, I guess I've got my work cut out for me. I've only got part of my grade 11 and I've never taken any college courses. And, although my kids talk about computers all the time, I don't even have the basics. These days, everything's on computer, so I'm sure that's something I'd need for any accounting-type job."

....

Bina confirmed that Gloria's first step would probably be to upgrade her basic skills. Then Bina suggested that Gloria think about going into a general accounting program at the post-secondary level. Bina cited her reasons for this suggestion:

....

"Broader programs tend to give more than just the very basic bookkeeping skills ... which means that more doors are open for you in more types of businesses. A general program can also give you a better background if you wish to continue your studies at a later date or start that home business you've dreamed about."

....

Bina added that most skill-training programs would teach computerized accounting systems to some degree, so becoming familiar with a computer beforehand might be a good idea. She continued:

....

"As you accomplish these short-term goals, you'll be working toward reaching your longer-term goal of becoming a bookkeeper."

....

Bina outlined specific education and training options for Gloria

Bina took this opportunity to begin to talk with Gloria about specific training and education options, taking into account Gloria's time and financial constraints. Outlining some retraining options, Bina told Gloria that high schools, community colleges, and community agencies offered upgrading programs for adult learners. Furthermore, learners could upgrade their skills by taking correspondence courses.

Bina added that the local community college offered a one-year accounting program at the post-secondary level. Some private institutions offered accounting programs, as well.

Key to Gloria's decisions would be factors, such as:

◆ how long she would be receiving Employment Insurance benefits;

◆ whether or not she could afford to stay in school after her benefits ended;

◆ how much upgrading she needed to prepare for the programs; and

◆ when and where the programs took place.

Bina felt compelled to add:

....

"We can look at the pros and cons of each program and then you can decide. We'll know more after we've looked at the skills you need to enter and do well in an accounting program and compare them to your current abilities."

....

Gloria needed to confirm her goals

Gloria continued the conversation by asking Bina:

....

"How do I really know that a career in accounting or bookkeeping is right for me? Is there anything else I can do to find out?"

....

To help Gloria confirm that bookkeeping or accounting could be suitable career paths for her to follow, Bina suggested that Gloria complete Holland's *Self-directed Search: A Guide to Educational and Vocational Planning.* Bina added that she could arrange for Gloria to take the inventory at the community college.

She explained that such tools could help confirm Gloria's choice or could point to similar and more specific careers where she could apply her bookkeeping and accounting skills and aptitudes.

Gloria and Bina Wrapped Up Step Two

Gloria told Bina that she was really excited about having set her goals for the future. First, she would look at getting the upgrading and retraining she needed to get a job in the accounting or bookkeeping field. In the long term, she would work toward becoming a bookkeeper and possibly having her own business.

Bina suggested that Gloria think about possible work environments, the range of job opportunities, and the skills and technology she might need to be successful in the workplace. Bina gave Gloria the names and telephone numbers of local business people to contact after their first meeting.

Bina added that the door was wide open for Gloria as an adult learner. She explained:

....

"After further researching your goals, you might decide that you want to pursue a field other than accounting or bookkeeping. If that happens, we can look at your long- and short-term goals again."

....

Now It's Your Turn

Work with a potential adult literacy learner to identify vocational, educational, and personal goals for the long and short term. In doing so, you should:

◆ present the benefits of setting clear and realistic goals;

◆ use the background information you gathered during Step One;

◆ help learners to discuss and set suitable and attainable long-term goals;

◆ help learners to discuss and develop suitable and attainable short-term goals;

◆ discuss the time frames and steps required to reach those goals;

◆ discuss the ongoing and ever-changing nature of the goal-setting process.

You will be recording the learner's long- and short-term goals on page two of the individualized training plan form in Appendix One. You may find it helpful to use Gloria's training plan as a guide.

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Personal Information

Name _Gloria Macri_

Address _1000 Main Street, Apt. 6_
Thunder Bay, Ontario P7C 4N1

Telephone _(807) 345-0000_

Additional

General Information

Date of Assessment _May 30, 1997_

Assessor _Bina Kapoor_

Company _Lucky's Manufacturing_

Location _Thunder Bay, Ontario_

Additional _E.I. - 37 weeks remaining_

Background Information

Educational Experiences and Strengths

- Completed grade 10 - grade 11 credits in advanced level math, general level English and accounting
- Excelled in math overall; poor grades in English and science
- Certificates for after-school language program in Italian; First Aid course in home
- Health and safety seminars at last place of work

Work History and Strengths
- PT sales clerk at gift store (2 yrs.) handled cash/credit cards/cust service/displays
- FT office assistant at same gift store (5 yrs.) bookkeeping/payroll/ordering supplies/typing
- FT warehouse clerk at gift wholesalers (6 yrs.) shipping and receiving/inventory control
- FT assembler at manufacturing plant (3 yrs.) assembled products/interpreter for Italian-spkg. empl.
- Overall strengths: works well independently and with others; dealing with money and records. Enjoyed working in office environment and interpreting Italian.

Transferrable Skills
- Dealing with money, budgeting, handling detailed work
- Organizing and coordinating events
- Managing time
- Working with small and mid-sized machinery and equipment

Preferred Learning Style
- Learning independently and at own pace
- Visual learner overall; learning best from diagrams and print material

Obstacles and Challenges
- Only 37 weeks of E.I. remaining
- Has two school-aged children - needs daytime/weekday programs - no vehicle
- Lowered self esteem due to unemployment

Required Supports
- Financial assistance - Childcare allowance
- Program accessible by public transit
- Transportation allowance
- Unemployment counselling

Page 2

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Long-term Goal
Self-employed bookkeeper operating out of own home

Short-term Goal
1 year college-level accounting program leading to a job in accounting or bookkeeping

Learning Achievements

Communications

Goal Requirements

Communications

Mathematics

Mathematics

Personal and Career Development

Personal and Career Development

Science

Science

Science

Assessor's Signature

Learner's Signature

Step Three: Assess the Requirements of the Learner's Goals

Input   To begin Step Three, you will need:

  ◆ specific and realistic goals which the learner has identified for the long and short term.

Process   In this chapter, you will learn how to:

  ◆ determine the specific knowledge, skills and behaviours required by the learner's goals; and

  ◆ apply an approach based on learning outcomes to identify the academic, language, and employability skills required by the learner's goals.

Results   At the end of this chapter, you will be able to:

  ◆ identify the knowledge, skills, and behaviours required by the learner's vocational, educational, or personal goals.

Identifying the Requirements of the Learner's Goals

*D*uring Step Three of the goal-directed assessment process, you will identify the basic skills requirements of the learner's educational, vocational or personal goals. This process will guide you as you assess the learner's current abilities in Step Four and develop an appropriate instructional program in Step Five.

....

Only by knowing something about the goal can we make informed suggestions about appropriate program content and delivery. Only by sharing that information with the client can they be involved with planning a realistic time frame. The assessment process, therefore, must not only identify current skills and abilities, but also provide some means to establish the person's potential for successfully reaching the threshold to the goal.[22]

....

It is important to inform learners of the purpose of Step Three. You should tell learners that once they have identified the academic, language, and employability skills required by their goals and have compared them to their current competencies, they will be able to identify any skill and knowledge gaps and map out a learning program.

Linking the Goal-Directed Assessment Process to a Program Approach Based on Learning Outcomes

Colleges, school boards, community agencies—all delivery sectors in the literacy field—have been working collaboratively to identify learning outcomes to recognize the achievements of adult learners. Draft foundation and college-preparatory learning outcomes have

been identified. Adult literacy deliverers in Ontario are now beginning to use them.

As the literacy field works with a program approach based on learning outcomes, the integration and compatibility with other approaches, such as the Ontario Secondary School Diploma (OSSD) and the General Education Development (GED) diploma, will emerge.

A program approach based on learning outcomes enhances the goal-directed assessment process. As an assessor, you can offer learners not only a highly individualized and learner-centred assessment and training plan, but also a plan which ensures that their learning achievements, as demonstrated by integrated segments of learning, are portable and transferrable to broader educational and training settings.

Furthermore, a program approach based on learning outcomes offers you a common language to use as you identify:

◆ the requirements of the learner's goals in Step Three;

◆ the learner's current abilities in Step Four; and

◆ the 'skill gaps' or what the learner still needs to achieve in Step Five.

Learning outcomes for specific content areas

Foundation learning outcomes have been identified in two main content areas:

◆ communications;

◆ numeracy

College-preparatory learning outcomes have been identified in four main content areas:

◆ communications;

◆ mathematics;

◆ science; and

◆ personal and career development.

They also include other skills required to participate effectively in today's workplaces and communities, such as the ability to:

◆ use technology and information systems effectively;

◆ evaluate various situations; and

◆ solve different kinds of problems.

The current draft of these learning outcomes lists demonstrations of each learning outcome and examples of questions to guide, but not limit, your assessment of the outcome.

Depending on the particular goals of the learner, different levels and specific content areas apply.

Applying a Program Approach Based on Learning Outcomes to Step Three of the Goal-Directed Assessment Process

As part of the goal-directed assessment process, you will be identifying the skills, knowledge, and attitudes that learners require to achieve short- and long-term goals. This information will help you to identify the learning program or path which learners may follow after their goal-directed assessment.

For example, to enter into the Fitter (Structural Steel/Platework) Trade, a learner must have grade 10. By examining *Regulation 34* of the *Apprenticeship and Tradesmen's Qualification Act*, available through Apprenticeship and Client Services, you can find out the academic and on-the-job expectations of this trade.

However, from speaking with employers, you will learn that grade 10 is the minimum requirement and that most employers expect applicants to have competencies equivalent to grade 12. Furthermore, from speaking to instructors in the in-school training portion for the Fitter (Structural Steel/Platework) Trade, you will learn that the learner will be expected to perform mathematical functions, such as:

◆ common and decimal fractions;

◆ squaring methods; and

◆ metric conversion.

Such valuable information will affect both the learner's training program and plan of action.

To meet the goal requirements the learner has the option of taking credit programming to gain grade 10 or higher academic credits or of participating in other available preparatory training in a college, community, or workplace program. If the learner decides on the latter option, then you can work with the college-preparatory learning outcomes in mathematics to help identify the learner's program outcomes. In this case, the learning outcomes in mathematics which are required by this goal include:

◆ using basic skills in mathematics as a foundation for advanced concepts;

◆ identifying and describing shapes and patterns in the environment in terms of geometric concepts; and

◆ using appropriate learning aids to facilitate computation.

Depending on the learner's situation, other outcomes might include:

◆ using algebra to solve applied word problems; and

◆ using mathematical techniques to solve technical problems.

Assessing Goal Requirements for Unemployed Workers

To help unemployed learners get back to work, your task during Step Three will be to research the particular basic skills which are required for a specific academic or skill-training program, job, or occupational area.

Although the initial research is time- and labour-intensive, you will find that many similarities emerge across training programs and job areas. It might be helpful to establish an in-house reference list detailing the specific skills, knowledge, and behaviours required for learners entering popular training or retraining programs and jobs.

Many assessors create *Program Profile* binders for the specific training or retraining programs and job areas.

Providing information about education and training

For learners with training or retraining goals, calendars for full and part-time programs at community colleges, boards of education, private training institutions, community agencies, and universities

are a good place to start. Reading the calendars and course descriptions will give you and the learner general information about the specific programs offered, such as:

◆ selection procedures;

◆ interview requirements;

◆ prerequisites for admissions;

◆ course starting dates and duration;

◆ certification information; and

◆ course content.

Most calendars will also list contact numbers when you need more information about the requirements for the learner's goals.

Prerequisites in many calendars are often expressed in grade levels, such as grade 12 mathematics and grade 12 English.

. . . .

We now realize that identifying a grade level helps little because it doesn't answer questions, such as:

◆ **Which math? Which English?**

◆ **All math or all English topics?**

◆ **To what level of competency?**[23]

. . . .

Therefore, you will need to research further to identify the particular skills, knowledge, and behaviours required for entry into and success in a particular learning or training program.

Discussing college or university programs

In discussing college or university programs, you should explain that learners can be admitted to a college or university without a secondary school diploma. As mature students, they can get credits for years worked in the field they wish to study, or for other learning which they have acquired through work, study and other life experiences. You should also explain terms to the learner, such as 'Prior Learning Assessment' and 'Mature Student Status.' Identifying available services may also help the learner.

Discussing the OSSD or the GED

For learners who want to obtain an Ontario Secondary School Diploma (OSSD), you should explain that they may be awarded credits on the basis of age, length of time out of school, courses taken outside the secondary school system, and the completion of apprenticeship training programs. You might also have to explain terms, such as 'experiential learning' and 'maturity credits.'

Depending on how advanced the learner is, you may recommend writing the GED challenge exam after a specific period of preparation.

Linking to apprenticeship

In Ontario, a number of projects have focused on determining the basic skills requirements for training or retraining programs. For example, the Evaluating Academic Readiness for Apprenticeship Training (EARAT) project has developed inventories of the specific academic skill competencies required for the in-college portion of five apprenticeship programs: motor vehicle mechanic, precision metal cutting, electrical, cook/baker, and plumbing.

You may find such inventories helpful as you identify the segments of learning which a learner needs to acquire in order to demonstrate the achievement of broader learning outcomes.

Making personal contact with training institutions and training professionals

It is helpful to make personal contact with the various training programs at local school boards, colleges, universities, and private training institutions. As entrance requirements for specific programs vary, you will need to maintain contact with the specific training institution offering the course or program required by the learner.

You should arrange to talk to the lead instructor or coordinator of a college program, the high school principal or guidance counsellor at the particular high school, or the Training Consultant at Apprenticeship and Client Services, Ministry of Education and Training.

At your meeting, you will have an opportunity to ask questions that go beyond the information presented in the calendars, course descriptions, and trades regulations, such as:

Ask the instructor

- *How popular is the program? Does it have a waiting list?*
- *Are there specific tests which the learner must take before entry? Are the tests standardized or alternative? Are samples available?*
- *What are the sizes of the classes?*
- *What is the instructional approach?*
- *Are there both theoretical and practical components?*
- *What are the attendance requirements?*
- *What kinds of assignments will the learner have to complete?*
- *How much does the program cost, including tuition, books, tools, and other costs?*
- *Can the learner receive credits for prior learning outside of school?*
- *What characterizes the ideal learner?*
- *Does the school help the learners find jobs?*

To identify the specific academic, language, and employability skills required by the learner's goals, you might ask:

Ask the instructor

- *What skills, knowledge and behaviours does the learner need to demonstrate in communications, computer technology, math, science, and personal and career development to enter into and succeed in your program?*

Referring to learning outcomes might help you and the trainer to identify those abilities which the learner requires for specific goals.

Getting information about jobs

When the learner's goal is to get a job, you and the learner can research job requirements by using tools, such as the *Canadian Classification and Dictionary of Occupations (CCDO)* and *National Occupation Classification (NOC)*. These resources will give you information about specific work tasks and required skills in occupational areas. Furthermore, the 'want ads' in the newspaper are often a good place for the learner to start. You might also talk to potential employers, unions, industry associations, and employees working in the field which the learner hopes to enter.

Identifying other requirements

Your discussions should also reveal the intra/interpersonal, analytical,
and educational planning skills which may help a learner to succeed
in a training or retraining program or job, such as the ability to:

◆ work within a group or team to achieve a common goal;

◆ choose and employ efficient learning strategies to facilitate the
learning process;

◆ work independently; and

◆ use systematic methods to analyze information and concepts and
solve problems or make decisions.

Collecting sample materials

It will be helpful to look at math, reading and writing samples, such
as tests, course outlines, curricula, classroom learning materials and
workplace documents which represent the academic and language
requirements of the training program or specific job or workplace.
If possible, obtain permission to copy samples of the instructional
materials or job-related documents. You can then use these
documents as the basis for the tests or activities you create for Step
Four and as a means of determining how comfortable the learner is
in using them.

When a specific set of academic skills has been selected as the goal,
you will need to collect materials at the required skill levels from an
upgrading program in your area.

Assessing Goal Requirements for Employed Learners

Many employed learners will have goals which are work- or
job-related. Workers may want to upgrade their skills to:

◆ improve their performance on the job;

◆ qualify for a promotion;

◆ learn new skills which will lead to new kinds of work; or

◆ adapt to a changing workplace environment.

Although the workplace needs assessment will give you general information about the skills required for improved performance on the job, you will probably have to spend additional time at the workplace to research the particular language, academic, or employability skills required for learners' work-related goals. Talking in detail to supervisors, trainers, union representatives, and workers will help you to determine those specific cognitive skills necessary to accomplish work-related tasks.

During your discussions, you might use the learning outcomes or specific generic skills lists, such as those included in *Job Related Basic Skills: Cases and Conclusions* (Sticht and Mikulecky, 1984) and *Adult Literacy: Skills for the American Workforce* (Hull and Sechler, 1987), to determine the generic skills used in the workplace and the relationship between these skills and individual job tasks performed.

Conducting a literacy task analysis

To assess the literacy requirements for specific job tasks, literacy task analyses have often been conducted by practitioners. They have determined:

◆ the basic skills embedded in the key tasks of a particular job;

◆ which of those basic skills workers already have; and

◆ which skills they may still need to acquire.

In a literacy task analysis, workers are observed on the job to determine what basic skills they use to perform job tasks.

Philippi (1992) recommends first forming an advisory panel of management, union representatives, team leaders, and workers to identify critical job tasks and then conducting literacy task analyses of those job tasks. The simultaneous observation and interview technique also involves collecting materials which workers must read or write as they perform the critical tasks.

Concerns about literacy task analyses

Many literacy practitioners have problems using literacy task analyses. Young (1994) and Belfiore (1996) contend that breaking skills into sub-skills does not take into account the importance of

higher-level thinking, such as working in teams. Moreover, literacy task analyses do not recognize the interrelationship between the specific job tasks, the workers performing the tasks, and the procedures themselves. You may also find that a job or workplace task does not always lend itself to a literacy task analysis.

Opposing such literacy audits, Sarmiento and Kay (1990) believe that workers themselves are best able to describe the specific demands and requirements of their jobs and how workplace changes may affect them.

... workers will contribute unique insights into the job content and skill requirements of their positions ... They will usually be keenly aware of those operations which require more advanced skills in reading, math, or communications.[24]

Furthermore, by conducting individual and group interviews with experienced workers, supervisors and union representative both during and after the workplace needs assessment, you will learn about the:

◆ the type and amount of basic skills required to perform specific job tasks;
◆ the related working conditions; and
◆ any difficulties workers are experiencing as they perform their job tasks.

Reviewing workplace documents

It is also a good idea to collect pertinent materials which are directly related to the performance of specific job duties or the workplace as a whole. These douments include materials which workers are required to read or write to perform their jobs, such as work instructions, technical manuals, forms and policies.

You might also review job descriptions which will provide a complete picture of each job and serve as a basis for determining the basic skills required to perform the job.

Identifying learning skills

Based on Pearn and Kandol's *Job Analysis Method*, Lewe (1993) suggests conducting an additional worker interview to analyze the learning skills required by the main duties of each learner's job.

Learning skills are the skills which learners use to increase other skills or knowledge and which help them perform effectively on the job. These learning skills include:

◆ following complex procedures;

◆ checking and assessing;

◆ memorizing facts;

◆ ordering, prioritizing and planning;

◆ looking ahead and anticipating;

◆ diagnosing, analyzing and solving;

◆ interpreting or using written, pictorial and diagrammatic material; and

◆ adapting to new ideas and systems.

Identifying the requirements of other goals

During Step Two of the goal-directed assessment process, workers may have expressed educational or personal goals, such as:

◆ getting a high school diploma;

◆ taking college or university courses; or

◆ operating a small business on the side.

For employed learners having goals of retraining or further education, you will research the requirements of the learners' goals by:

◆ contacting training institutions and training professionals;

◆ visiting training institutions;

◆ speaking to industry associations; or

◆ collecting sample materials.

A heavy machine operator at a pulp mill in Northern Ontario, Bill's personal goal was to open his own woodworking business. After speaking with the guidance counsellor at the local high school, the assessor learned that Bill's most challenging goal requirement was learning how to operate a personal computer to prepare cost estimates.

Completing Step Three of the Goal-Directed Assessment Process

At the end of Step Three, you and the learner will know the knowledge, skills, and behaviours required by the learner's vocational, educational, or personal goals. This information will help you to determine which of the learner's competencies you will need to assess during Step Four.

Working with the Case Study

The next section of the chapter shows Step Three of the goal-directed assessment process 'in action.'

As you read about Gloria and Bina, you will observe how they identified the specific academic, language, and employability skills required by Gloria's goals.

CASE STUDY

The Requirements of Gloria's Goals

....

"Gloria, during Step Three of your assessment, our primary focus will be on your short-term goal of beginning to train for a career in accounting. We'll discuss the prerequisites for getting into college and the specific skills and knowledge you'll need to do well in the college's one-year accounting program. These skills include not only your ability to do math, but also your ability to communicate effectively and solve personal and work-related problems."

....

Bina went to the shelf and pulled out the course calendar for the local community college and her *Program Profile* binder containing a summary of the specific skills, knowledge and behaviours required for the college's one-year accounting program.

Bina recalled researching Gloria's goal requirements

Bina explained that she had put together her information binders after she had gone to the college and met with the coordinator of the accounting program. Together, Bina and the coordinator had discussed the particular competencies required for a student entering the program. Bina had also looked at course materials, such as textbooks, tests, and the curriculum. She remarked to Gloria:

"The coordinator let me photocopy samples of some of the program materials. I'll give you copies so that you can look them over on your own and see how comfortable you are with the type of reading, writing and math that you'll need to do."

Bina and Gloria examined the college's accounting program

Looking at the course calendar, Gloria read that the college's one-year program ran continuously for 52 weeks. The calendar also stated that applicants to the college required grade 12 math and English.

Gloria look dismayed and interjected:

"Does that mean I have to get my high school diploma before I can go to college?"

Bina quickly replied:

"No ... as an adult learner, you have many options open to you. You can apply to the college as a 'mature student' ... that means you're 19 or older, but don't have an Ontario Secondary School Diploma. After applying, you'll have to write an admissions test specifically designed for the accounting program."

After discussing the general application process, Bina talked about the specific competencies Gloria would need in order to pass the program admissions test and succeed in the accounting program.

The particular learning outcomes and demonstrations which Gloria needed

Rather than talking in grade levels, Bina explained they would be identifying the specific skills, knowledge and behaviours required by Gloria's goals. These 'learning outcomes' or 'learning achievements' were grouped in four categories:

◆ communications;
◆ mathematics;
◆ science; and
◆ personal and career development.

As the accounting program did not require any science, Bina told Gloria that they would focus only on communications, mathematics, and personal and career development.

Bina began with the program's requirements in communications

Based on her prior meetings with the coordinator of the accounting program and a close review of program materials, Bina had determined that Gloria would need to be able to:

◆ read for various purposes;
◆ present and promote ideas using various forms of communication;
◆ process oral and written communications;
◆ research and use information;
◆ critique her own work and recognize the quality of communication required for success; and
◆ solve communications problems independently and collaboratively.

In explaining the communications requirements to Gloria, Bina elaborated:

••

"For this accounting program, you must be able to read different types of reading material and use your critical thinking skills in doing so. The college recommends that you can read and understand things like textbooks, manuals, reports, business letters, and memos. You'll also need to read for research purposes and use materials, such as financial statements or journals. What's more, you'll have to know how to understand and use information from graphs, pie charts, and tables, like those you might find in business literature."

••

Bina went on to say that Gloria should be able to demonstrate that she could use what she had read to write about it or present it using different ways of expressing her point of view. She told Gloria:

••

"As an accounting student, you'll often have to read, write, listen, speak and edit … as you do in-class assignments and homework. You'll need to be able to read, take notes, and then brainstorm your own ideas as you write essays, reports, business letters, and resumés. Then you'll have to critique what you've done and edit it after getting feedback from others. These kinds of organizational skills will also help you to make effective oral presentations and to participate in class discussions and debates."

••

Gloria chimed in and admitted that she was a little nervous about textbook reading and that she was particularly anxious about writing essays and presenting in front of college students.
Gloria said:

••

"It's been a long time since I've had to read for school or write anything more complicated than notes to my kids' teachers. And, I think I'd be a wreck presenting in front of all those people. But I think I'm fairly organized and, over the years, I've learned how to juggle several things at the same time."

••

Hoping to relieve some of Gloria's anxieties, Bina said:

"It is very likely that many of the students in a one-year program will be adult learners like you. True, a few people might have had some experience doing oral presentations, but most students will probably feel as nervous as you. In your case, working as a sales person and interpreting for groups of Italian coworkers are two situations in which you spoke in front of people."

Gloria agreed and said that she was relieved to know that she would find other adult learners in the college classes. Bina continued to talk about the communications requirements:

"Finally, the college stresses that students have a very good grasp of standard English ... especially things like proper grammar, punctuation, spelling, and pronunciation. You'll also need to be able to recognize effective communication ... when to use formal or informal English and how to adjust a piece of writing or a presentation to different audiences."

Gloria laughed as she told Bina that she often caught herself using some of the slang or trendy expressions which her kids brought home from school. However, she added that she was aware that the expressions were inappropriate for more formal communication in the workplace or in the classroom.

Bina asked Gloria if she had any specific questions about the communications requirements for the accounting program. Gloria replied that everything seemed clear. So they moved on to discuss the requirements in math.

Bina talked about the specific math requirements

For the college's accounting program, Bina had determined that Gloria would need to be able to:

◆ use basic math skills as a foundation for advanced concepts;

◆ use algebra to solve applied word problems; and

◆ apply mathematical principles in solving everyday business, financial and personal problems.

Bina had referred Gloria to her information binder and the list of skills, knowledge and behaviours required for the one-year accounting program at the college. She explained that Gloria needed to know the foundation skills in math to be able to do the more advanced functions, such as using algebra in word problems. Gloria also had to be able to use basic math operations as she solved common business and personal financial problems. As she listened attentively to Bina, Gloria examined the list and then exclaimed:

"Even though it's been years since I've taken math, I recognize a lot from this list ... I could definitely do whole numbers, fractions, decimals, percents and the business math because that's what I've done at work and at home and as a volunteer. But, I'm sure I'll need a lot of practice with signed numbers, square roots, powers and ... oh yes ... algebra, equations and formulas. And, metric wasn't used that much when I was in school, so I don't really know a lot about it. It's a little embarrassing, but I still use 'pounds' and 'ounces' at times."

Bina remarked that although Gloria should learn the metric system, it did not make up a large part of the program's curriculum. More specifically, Bina explained that Gloria would need to know functions and terms, such as scientific notation, exponential expressions, deductive reasoning, like terms, variables, direct, inverse, and compound variation. For the business stream of math, Bina explained:

"As you can see, one of the requirements is being able to use math principles to solve everyday business, financial, and personal problems. Since you've done calculations for a retail business and handled cash in your volunteer work, you will probably have few problems meeting this requirement."

Bina stressed the importance of personal and career development skills

Bina commented that Gloria would need other kinds of skills, knowledge, and behaviours to perform effectively in an accounting program and to achieve her long-term goal of working as a self-employed bookkeeper. She would need specific intra/interpersonal, analytical, and employability skills, including the ability to:

◆ work within a group or team to achieve a common goal;
◆ use systematic methods to solve problems, make decisions, and set goals;
◆ use systematic methods to analyze information and concepts;
◆ choose and employ efficient learning strategies to facilitate the learning process; and
◆ formulate career choices, a career plan, and a job search leading to employment.

Bina explained that all of Gloria's goals required being able to work and cooperate with others, including peers, instructors, supervisors, employers, and, eventually, clients. Gloria would also need to be able to communicate and to participate in both formal and informal situations, often as part of a team. To summarize, Bina said:

"According to the coordinator of the accounting program, you'll spend a lot of classroom time working with others. And, as you know, group work is also important in most business settings. You might have to analyze and interpret what group members have said and then contribute to the discussion by stating and supporting your own point of view. Furthermore, you should be able to handle and respond appropriately to criticism and differing points of view."

Gloria learned that educational planning skills and lifelong learning skills were also crucial to succeeding in the accounting program and in her long-term goals of becoming a self-employed bookkeeper. Bina commented:

....

"Developing effective learning strategies, such as time management, organizational skills and study skills are particularly important for your overall success. You'll need these skills not only as you take part in the accounting program, but also as you train for a new job or take courses for starting your own business. Furthermore, finding job opportunities is challenging and you'll need to be able to develop career plans and effective job searches which will lead to the jobs you want."

....

Gloria nodded and remarked that she could see the benefits of having all of these skills to reach both her short-term and long-term goals.

Bina and Gloria Wrapped Up Step Three

Bina said that she would be listing Gloria's goal requirements on page two of her individualized training plan. Then she asked Gloria if she had any questions or if there were other things she wanted to discuss about her goal requirements. Gloria replied:

....

"At this stage of my life, I think I already have some of the skills which my goals require. But how will I know which ones I have and which ones I still need to get?"

....

Bina answered that in Step Four of the goal-directed assessment process, she would be asking Gloria to take some testing exercises and activities to assess her current competencies in communications, math, and personal and career development.

....

"If you're ready, we can move on to the next step right now."

....
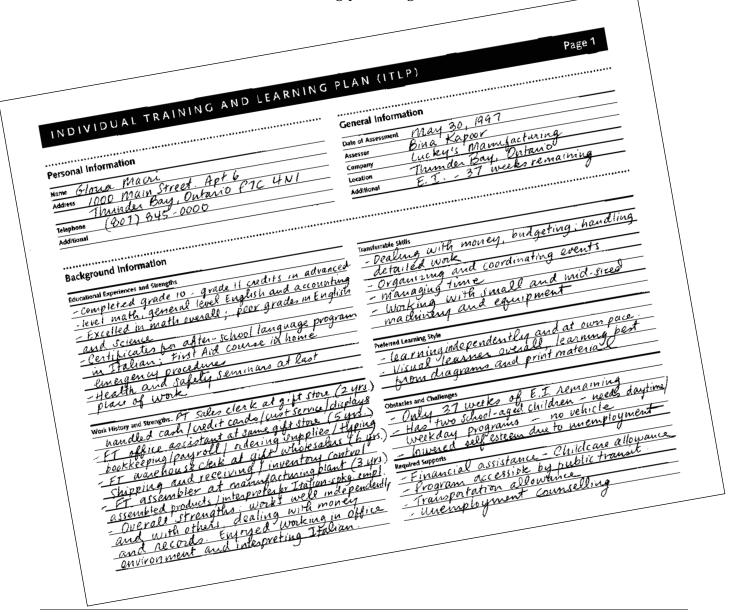
Gloria laughed nervously but said that she was ready to go forward with Step Four of the goal-directed assessment process.

Now It's Your Turn

Work with a potential literacy learner to identify the requirements of the learner's goals. In doing so, you should:

◆ explain the purpose of identifying the skills, knowledge and behaviours required by the learner's goals; and

◆ research and identify the particular basic skills required for the learner's vocational, educational, or personal goals.

You will be summarizing the information which you have gathered during Step Three on page two of the individualized training plan form, included in Appendix One. You may find it helpful to use Gloria's training plan as a guide.

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP) — Page 1

Personal Information
Name: Gloria Macri
Address: 1000 Main Street, Apt. 6, Thunder Bay, Ontario P7C 4N1
Telephone: (807) 845-0000
Additional:

General Information
Date of Assessment: May 30, 1997
Assessor: Bina Kapoor
Company: Lucky's Manufacturing
Location: Thunder Bay, Ontario
Additional: E.I. - 37 weeks remaining

Background Information

Educational Experiences and Strengths
- Completed grade 10 - grade 11 credits in advanced level math, general level English and accounting
- Excelled in math overall; poor grades in English and science
- Certificates for after-school language program in Italian; First Aid course in home
- Health and safety seminars at last place of work

Work History and Strengths: PT sales clerk at gift store (2 yrs.) handled cash/credit cards/cust. service/displays
- FT office assistant at same gift store (5 yrs.) bookkeeping/payroll/ ordering supplies/typing
- FT warehouse clerk at gift wholesalers (6 yrs.) shipping and receiving/inventory control
- FT assembler at manufacturing plant (3 yrs.) assembled products/interpreter for Italian-spkg. empl.
- Overall strengths: works well independently and with others; dealing with money and records. Enjoyed working in office environment and interpreting Italian.

Transferable Skills
- Dealing with money, budgeting, handling detailed work
- Organizing and coordinating events
- managing time
- Working with small and mid-sized machinery and equipment

Preferred Learning Style
- learning independently and at own pace
- Visual learner overall, learning best from diagrams and print material

Obstacles and Challenges
- Only 37 weeks of E.I. remaining
- Has two school-aged children - needs daytime weekday programs - no vehicle
- lowered self esteem due to unemployment

Required Supports
- Financial assistance - Childcare allowance
- Program accessible by public transit
- Transportation allowance
- unemployment counselling

Page 2

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Long-term Goal
Self-employed bookkeeper operating out of own home.

Short-term Goal
1 year college-level accounting program leading to a job in accounting or bookkeeping

Learning Achievements

Communications

Goal Requirements

Communications - Read/use critical thinking skills to understand manuals, reports, letters, memos. Read/research information from financial statements, graphs, charts and tables. Express points of view and factual information using various forms of communication. Critique own work - edit according to feedback. Take organized notes and brainstorm ideas. Demonstrate good grasp of elements of written and spoken English.

Mathematics - Use basic math to perform more advanced functions - Perform operations using whole numbers, decimals, fractions, percents, metric, signed nos, square roots, powers, scientific notation, exponential expressions, algebra, equations & formulas. Understand math terms. Use variables, direct inverse & compound variation to solve applied word problems. Use basic math to solve business / personal / financial problems.

Personal and Career Development - Work with peers, instructors, counsellors, coworkers, clients. - Contribute to discussions by analyzing / interpreting ideas while stating & supporting own viewpoint. Respond to criticism & differing views. Develop effective learning strategies, such as time management, organizational skills and study skills. Develop career plans and study search.

Science

Mathematics

Personal and Career Development

Science

☐ ☐ ☐ ☐ ☐

Assessor's Signature

Learner's Signature

Science

Step Four: Assess the Learner's Achievements

Input   To begin Step Four, you will need:

- information about the specific skills, knowledge, and behaviours which a learner needs to meet long- and short-term goals.

Process   In this chapter, you will learn how to:

- create an atmosphere of trust in a testing situation;
- select or create appropriate assessment procedures and tools to diagnose a learner's current abilities;
- assess a learner's current skills, knowledge, or behaviours with respect to her or his specific goals; and
- use broad learning outcomes as an alternative way to assess a learner's current abilities.

Results   At the end of this chapter, you will be able to:

- use appropriate assessment tools to determine which of the required skills, knowledge, and behaviours a learner can already demonstrate.

Where Is the Learner Now?

*D*uring Step Four of the goal-directed assessment process, you will determine a learner's current abilities to perform the particular skills and tasks required by the learner's individual goals.

For unemployed learners, you will assess their readiness to enter into employment, specific skill training, or post-secondary education. For employed workers, you will identify their actual competencies based on the skills, knowledge, and behaviours required to meet job or workplace demands. For both employed and unemployed workers, you will also assess their learning achievements with respect to their personal goals.

Assessing to Learning Outcomes

An integrated approach based on learning outcomes can provide a common framework and language to use as you summarize the learner's abilities and achievements. The learning outcomes and demonstrations which you have identified as the goal requirements in Step Three now become the benchmarks against which you assess the learner's current abilities in Step Four. During Step Four, you will determine if learners can reliably demonstrate that they have the skills, knowledge, and behaviours needed to achieve their short- and long-term goals.

For learners who have goals which can be achieved by demonstrating foundation learning outcomes, you will assess their achievements in communications and mathematics. For learners who have goals which can be achieved by demonstrating college-preparatory learning outcomes, you will assess their achievements in

communications, mathematics, science, and personal and career development.

For example, if an unemployed learner's goal is to retrain as a dental assistant, you will assess the learner's current abilities in science, communications, math, and personal and career development, as required by the dental assistant program at the college level. Similarly, if a maintenance worker has goals of improving oral communication skills to get a promotion and to become more active in union activities, you will assess the worker's abilities in communications and personal and career development required by the learner's work and personal goals.

Creating an Atmosphere of Trust

The atmosphere of trust and empathy which you and the learner achieved during Steps One and Two may be harder to achieve in Step Four. As Step Four usually incorporates the use of formal or informal tests and quizzes for learners who may not have had recent experience with testing and assessment, performance anxiety may run very high. Learners may feel apprehensive and often recall earlier experiences when they were discouraged by negative results.

In workplace contexts, learners may feel particularly apprehensive. They may fear losing wage or benefit increases if tests reveal that they have skill limitations.

Wary of the upcoming literacy testing, Pearl, a dishwasher at a mid-size hotel, feared that she might lose her job if she performed poorly on any of the tests. Although she was told that the test results would be used to help her do her job better, she was sceptical.

Writing from an organized labour perspective, Sarmiento and Kay (1990) warn of the potential abuses for basic skills testing, such as:

◆ supervisors using test scores to evaluate workers, regardless of how workers are actually performing their jobs;

◆ organizations replacing workers with low scores; or

◆ organizations assigning a 'grade level' to job classifications and preventing workers with low test scores from applying for them.

Therefore, you should stress to learners that any 'testing' which occurs during Step Four of the goal-directed assessment process is a diagnostic process designed to discover what they already know and can do with respect to their identified goals. You should also tell learners that the test results will be confidential.

By emphasizing the positive, you will guide learners to view assessment as an investigative and goal-directed process rather than one of competitive performance.

In workplaces, you may need to reassure workers that the results of Step Four will help to design an upgrading program which will, in turn, help them better meet specific workplace demands and work toward achieving personal goals. You should also ensure that workers and unions are involved as you lay the ground work for any 'testing' situation.

Setting the stage

It is important to keep in mind that, although many adults have the knowledge to do well on a test, they may not have strong test-taking skills. Poor performance on a test or activity does not always mean that the learner is unable to perform a task or demonstrate a skill. Therefore, you should set the stage by:

◆ demonstrating clearly what you expect learners to do for each assessment activity;

◆ reminding learners that they can ask questions or stop the assessment at any time; and

◆ informing learners about the specific skills or knowledge they should be demonstrating as they perform a specific activity.

Selecting Appropriate Assessment Tools

No single data-gathering instrument or strategy can adequately diagnose a learner's current abilities. Therefore, it is advisable to use a variety of assessment tools and methods during Step Four of the goal-directed assessment process.

Information about the learner's educational history, work experience, short- and long-term goals, and goal requirements acquired during

Steps One, Two and Three should give you an indication of where to start and the best tools to use.

For example, you might decide to:

◆ create your own tests or activities for a particular learner using examples and materials drawn directly from the workplace or training program;

◆ administer standardized tests;

◆ use a mixture of commercially-available tests and custom-designed tools, especially when you have to deal with time constraints and to test many learners at the same time; and

◆ ask learners to self-assess how well they use basic skills in different aspects of their work and personal lives.

Using Standardized Tests

A standardized test is a test that is administered under standard conditions to obtain a sample of learner behaviour that can be used to make inferences about the learner's ability. A standardized test differs from an informal test in that the latter does not follow a fixed set of conditions.[25]

For example, in a standardized math test, all learners, regardless of individual goals, are tested for their ability to demonstrate the same math skills. Following the same procedures, learners must answer the same types of questions within the same time limits.

Standardized tests are very popular for assessing learners' knowledge and skills. They are relatively short and easy to score, can be administered to large groups of learners, and often require little training on the part of the assessor or instructor. In addition, these commercially available tests have construct validity and scoring reliability.

... they (standardized tests) are viewed by their advocates as scientific measuring instruments that yield reliable and objective data on the abilities, skills and achievements of adult learners ... data that are free from the vagaries of judgment of individual teachers.[26]

Norm-referenced and criterion-referenced tests

Standardized tests may be either norm-referenced or criterion-referenced. Norm-referenced tests compare the performance of a learner with the performance of other learners who have taken the same test. Norm-referenced tests can answer the questions:

◆ *How well did this person compare with others who took the identical test?*

◆ *Is she or he above or below the average of the norming group?*

◆ *Have the learner's skills improved since she or he was last tested?*

Criterion-referenced tests, in contrast, compare a learner's score to an absolute standard or criterion of performance. A learner's test score or achievement is established in relation to how well she or he achieves that standard or criterion of learning.

Criterion-referenced tests can answer the questions:

◆ *How well has the learner mastered the specific skills, knowledge or behaviours required by her or his goal?*

◆ *Can the learner perform at the desired criterion, such as correctly answering 80% of the test questions?*

◆ *Can the learner perform a particular task?*

Practitioners often use the results of standardized tests when they want to place new learners or when learners need specific test scores and grade levels to enter skill-training and post-secondary programs. In workplaces, standardized tests are often used for learners entering programs which focus on developing general literacy abilities for personal goals as well as job- or workplace-specific literacy. Such programs may use several standardized tests to measure the generic levels of workers' basic skills.

Using standardized tests to assess reading levels

Standardized tests are most frequently used to measure reading components, such as vocabulary, paragraph comprehension and spelling. Most standardized tests of reading are norm-referenced and make grade-level comparisons.

The most commonly used reading tests are the *Nelson Denny, Canadian Adult Achievement Test (CAAT), Brigance Diagnostic Test,*

English Testing Service (ETS) test, Test of Adult Basic Education (TABE) for both native English speakers and second language learners and the *Basic English Skills Test (BEST)*, designed for English as a second language speakers.

Although some standardized tests are available for math and science, a more typical practice is using instructor- or assessor-made tools based on the skills, knowledge and behaviours required for a specific job or training program.

Dissatisfaction with standardized tests

....

As standardized tests have come into sweeping use, so have complaints about them and their validity. For many the most important question is, do the test results tell us anything of real value..?[27]

....

Lytle and Shultz (1992) cite many drawbacks to using standardized tests. They contend that standardized tests do not reveal the skills and prior knowledge which learners have acquired from their backgrounds and various learning experiences. Standardized tests reinforce the notion that literacy involves the mastery of a set of "autonomous, technical skills unrelated to any meaningful context."

....

Because most standardized tests contain short decontextualized paragraphs written with a content and style similar to textbooks followed by multiple-choice questions with pre-determined answers, they do not reflect the variety and richness of the reading adults do ... Knowing how well a student performs on this type of test does not tell us how well the student might handle magazines, novels, newspapers or job-related reading.[28]

....

In workplaces, many practitioners feel that standardized tests neither adequately assess a worker's ability to use literacy or math on the job nor assess a worker's ability to use critical-thinking or problem-solving skills.

....

Standardized tests exaggerate skill deficits ... A standardized test will show that a person cannot solve test items, but won't reveal the person's abilities to solve practical problems on the job or at home.[29]

Young (1994) notes that standardized tests have a number of limitations when used in workplace literacy programs. The test scores or grade levels do not tell you:

- how workers interact or accomplish job-related tasks;

- how workers apply their basic skills to get work done;

- what organizational factors prevent people from using and developing their basic skills to get work done.

Furthermore, for learners with basic literacy and language skills, many practitioners contend that standardized tests neither adequately assess the learners' strengths and weaknesses nor address their individual goals. Standardized tests have also been criticized for presenting further barriers to English as a second language (ESL) learners.

. . . .

It is not always clear whether ESL learners have trouble with selected test items because of difficulties with reading, with the vocabulary, or the cultural notions underlying the test item.[30]

. . . .

For the goal-directed assessment process, the grade-level equivalents produced by most standardized tests will not be as useful to you or the learners as more descriptive information about learners' abilities which takes into account prior learning and experiences. You may also find that grade levels tend to confuse learners.

. . . .

Unemployed after working 22 years in a meat processing plant, Tomaso's test scores revealed that he could read at a grade 3 level. Confused and discouraged, he thought that he would have to return to grade 3 to upgrade his skills.

. . . .

In favour of standardized tests

Although, many educators have problems with using standardized tests as accurate assessment tools, one practitioner admits:

... standardized tests are an integral part of the fabric of our lives.
One has to take tests to get into college, to enter the military, to
obtain civil service employment. We ought not to ignore the value for
students being familiar with them and being able to use them to their
own advantage. While practitioners continue to use standardized
tests, it
is important that they be clear about what the tests can and cannot
measure and that the information be communicated to their
students.[31]

In fact, many skill-training programs will require that a learner's abilities in English and math be expressed at specific grade levels. In such cases, it is in the learner's best interest for you to assess current abilities using a variety of instruments, including standardized tests.

As most standardized tests present material organized by topic and by level of difficulty, Craig (1994) perceives them as a valuable complement to assessment material drawn directly from the workplace or skill training program. Since your goal during Step Four is to identify if a learner has the competencies particular to a specific goal, you may decide to use portions of different standardized tests to determine if learners can reliably demonstrate the knowledge and skills required for their goals.

However, in using standardized tests in a criterion-referenced manner you should:

◆ use tests which are appropriate for adult learners;

◆ use tests covering an appropriate range and level of difficulty;

◆ use tests with sufficient questions at the required level of difficulty;

◆ use tests, or portions of tests, which relate to and reliably measure the skills and competencies needed for the learner's personal, vocational or educational goals; and

◆ administer the tests without time constraints.

The fact remains that standardized assessment tools are not for everyone. Citing the potential for misuse, Sticht warns that standardized tests can, in fact, present false information to learners when administered under non-standard conditions.

If you went to a physician who tested your blood for cholesterol but didn't use the test instrument the way it was designed to be used, ignored the time required for analysis of the blood or maybe combined the wrong chemicals in the analysis and then gave you a false number, you could sue the physician for malpractice. Because then you might walk out thinking you have no problem and indulge yourself in all kinds of things that wind you up in a heart attack.[32]

Using Alternative Assessments

Alternative assessment is alternative because it provides choices that go beyond traditional or standardized measurement.[33]

Seven key principles underlie alternative assessment practices:

- They should help the learner's individual goals;
- They should reflect what the learner needs or wishes to accomplish;
- They should build on the learner's experience and strengths rather than deficits;
- They should be done *with* the learner, not to the learner.
- They should not depend on a single procedure, but on a variety of procedures.
- They should provide feedback that will make programs more effective.
- They should use testing instruments which convey respect for the learner. [34]

Using alternative assessment practices in the goal-directed assessment process will provide you and the learner with a descriptive and comprehensive picture of individual accomplishments. Furthermore, when possible, alternative assessment instruments should include authentic or 'real life' tasks and enable learners to participate actively.

You might use instruments, such as:

◆ assessor-developed tests which measure the learner's ability to demonstrate specific learning outcomes;

◆ questionnaires;

◆ reading inventories at different levels of difficulty;

◆ actual goal-related reading and writing materials;

◆ writing samples;

◆ learner self-assessments; or

◆ performance-based activities which reveal how learners actually use their basic skills or other acquired knowledge.

You may want to develop a pool of alternative assessment instruments to assess a learner's abilities against the broad learning outcomes and demonstrations required by her or his goal.

For example, you might design a task which allows the learner to demonstrate the ability to create and interpret numerical tables, charts, and graphs to express and understand numerical ideas by:

◆ performing all operations accurately and presenting the resulting information in tables and on graphs; and

◆ interpreting the results shown by tables, charts, and graphs accurately for a goal-related purpose.

Similarly, for a goal which requires competence in biology, you might ask learners to demonstrate that they can communicate scientific and technical information effectively by:

◆ acquiring information from a variety of biology reading materials;

◆ using the information acquired to express ideas clearly, concisely and correctly in a piece of writing; and

◆ using terminology and symbols accurately in writing.

For basic-level learners who may need a 'foundation' for the learning required to begin a job, training or retraining program, you might use an informal reading inventory to assess general reading levels. To boost their confidence, you might choose reading levels which are easy for learners and which deal with familiar subject areas.

MacKillop (1994) uses reading selections adapted from writings of learners or teachers which reflect the experiences of adults in literacy

programs. She offers learners a choice among several reading selections at different levels of difficulty.

For each instrument you use, it is important to research the objectives of the instrument thoroughly and to ensure that the skills, knowledge, and behaviours assessed are indeed those which are necessary to meet the learner's goals.

Using alternative assessments in the workplace

Traditional measures of basic skills tend to focus on learner deficits rather than validating strengths. In a workplace education program, such an approach tends to reinforce negative attitudes about assessment and about the education program itself. Employees might see themselves as being 'investigated for skill deficiencies' and having their job security threatened. This discourages active learner participation.[35]

As learners in workplaces usually have goals that are more specialized, the initial assessment might include custom-designed instruments based on individual and organizational needs and goals.

For example, you might use tests or activities customized to the particular literacy demands of learners' jobs, as identified in a literacy task analysis. As Jurmo (1995) suggests, you might also collect initial assessment information about a worker's current skills, knowledge, and behaviours by:

◆ using questionnaires with open-ended formats so that learners can demonstrate their writing skills, thinking, and experiences;

◆ using problem-solving tests or role playing in which learners demonstrate their ability to use specific skills to solve particular problems or accomplish specific tasks;

◆ observing how well learners perform or accomplish particular workplace tasks; or

◆ reviewing on-the-job writing samples to assess features, such as comprehension, clarity of expression, vocabulary and grammar.

Furthermore, holding discussions of small groups of workers will reveal the range of individual competencies and needs in a particular workplace.

Completing Step Four of the Goal-Directed Assessment Process

During Step Four, learners will complete a variety of tests and other activities which will enable you to assess their current competencies. It will be appropriate to break at the end of Step Four so that you can begin to prepare for Step Five and your final meeting. Before the final meeting you will:

◆ interpret the results of the learner's tests and activities;

◆ identify the learner's skill gaps;

◆ determine an instructional program and action plan to help the learner acquire the skills, knowledge and behaviours which are still needed; and

◆ summarize the information gathered during Steps One, Two, Three, and Four on the learner's individualized training plan.

Working with the Case Study

The next section of the chapter shows Step Four of the goal-directed assessment process 'in action.'

As you read about Gloria and Bina, you will observe how they went about identifying Gloria's current competencies with respect to those required by her goals.

CASE STUDY

Gloria's Achievements

Gloria and Bina had reached Step Four of the goal-directed assessment process. For assessing learners' current achievements, Bina had designed tools consisting of tests and activities based on college-preparatory learning outcomes. Bina had categorized her assessment activities and tests according to three competency levels: basic, mid and advanced. Depending on the learners' goals, Bina's tests and activities varied in content, levels, and methods.

Gloria's abilities were assessed in math, communications, and personal and career development—the specific requirements Gloria needed to meet her goals of entering a college accounting program and eventually operating as a bookkeeper from her own home.

To assess Gloria's abilities, Bina had chosen a criterion-referenced math test and communications activities, including a comprehensive writing sample. For personal and career development, Gloria's current competencies were assessed using portions of the communications activity as well as an informal discussion.

Bina told Gloria about the purposes and procedures in Step Four

In briefing Gloria about Step Four, Bina said:

"Now that we've identified what you'll need to pass admissions testing and succeed in an accounting program, we're going to identify what you can already do and where you may need to improve. By focusing on your achievements, we can see how close you are to meeting your goals and can avoid repeating the learning you've already done. Since your goal is to take a post-secondary program, I'd like you to try tests and activities designed for advanced-level learners. I think you'll be fairly comfortable with the activities, considering that you left high

school part way through grade 11 and have had some practical accounting experience."

....

Gloria asked Bina about the tests:

....

"I'm not sure what to expect. Can you tell me a bit about the tests and activities before I try to do them?"

....

Bina was sensitive to the fact that Gloria had not been 'tested' in many years, so she reassured her by explaining:

....

"You and I need to see specifically where you are now so that we can determine exactly what you need to meet your goals. That way, we can create the best action plan for you when we reach Step Five. The activities in math and communications are designed to help you do well, not 'trip you up'. They start with simpler things to do and gradually move on to the more advanced tasks. The work should take about an hour and a half to complete. Remember, you can ask me questions or stop the testing at any time."

....

Bina also mentioned that she had designed the test and activities so that they reflected the kinds of work Gloria would be doing in a college program. She added that the communications activity, in particular, was probably very different from the kinds of tests Gloria had taken in school. Bina reassured Gloria that she would explain everything in detail.

Bina explained the math test to Gloria

Knowing that Gloria perceived math as one of her strengths, Bina had asked Gloria to do the math test first. Bina's test would enable Gloria to demonstrate that she had acquired the math knowledge, skills and behaviours needed for the college's accounting program. Specifically, Gloria would be demonstrating that she could:

◆ use basic math skills as a foundation for advanced concepts;

◆ use algebra to solve applied word problems; and

◆ apply mathematic principles in solving everyday business, financial, and personal problems.

The test covered broad math units, including whole numbers, fractions, decimals, metric, percent, ratio and proportion, signed numbers, power, scientific notation, square roots, algebra, and business math. It also included advanced word problems which required Gloria to use basic math operations.

Bina explained that for each math unit, Gloria would perform five number problems and one word problem. Bina also asked Gloria to show all her rough work so they could identify specific areas of difficulty.

A snapshot of Gloria's math test

The following sample shows the broad range of questions and problems on Gloria's math test:

Business Stream: Math Test - Part A

Whole numbers
Use the order of operations to answer the following:
$$4 \times 5 + 2 - 3 = ?$$
$$5 + 3 (2 \times 7) + 9 = ?$$
$$3 \times 6 + 12 \div (3-1) = ?$$

Fractions
Change the following to mixed fractions:
$$20/6 = ?$$
$$15/6 = ?$$

Solve and reduce to the lowest terms:
$$\frac{4\ 1/6}{5} = ?$$

$$(3\ 2/3 \times 6\ 1/4) + (18\ 1/2 + 6/15) = ?$$

Decimals
Solve the following:
$$2.5 + 4.7 + 0.007 + 78 = ?$$
$$4.68 \times 38 = ?$$
$$558.31 - 29.69 = ?$$
$$1.9 \div 0.63 = ?$$

Rearrange 101.11, 11.101, 11.111, 10.11, 111.11 in decreasing order using > or <

Business Stream: Math Test - Part B

Algebra

Company M wants to invest $150,000. Part of this amount will be invested at 9.5% and part at 14%. The total earnings on the investment must yield $165,000 per year. How much has to be invested at 9.5% and how much at 14% to yield the desired yearly income?

Business Math

The Lucky Lotto promises the winner of its lottery a sum of $10,000,000. The actual amount that the winner will receive is $2,500,000 on winning; $250,000 per year beginning one year from winning for the next 20 years; and a final payment of $2,500,000 in 20 years. If Lucky Lottery opens an account at its bank to cover all of these payments, how much must they deposit if the bank pays interest of 9% per annum, compounded annually?

(Adapted from materials created by Metro Toronto Movement for Literacy, Adult Preparatory Programs Articulation and Standards Project [ASP] and Humber College.)

Gloria completed the math test

Having completed the math test in about 25 minutes, Gloria was then asked to describe what specifically she had found easy or difficult to do. She told Bina that, overall, she had felt fairly confident as she tackled the math questions, but remarked:

"It's been a while since I've used algebra, so I found that section quite difficult. And I was a bit nervous, since I haven't taken a math test since I left high school."

Bina replied that it was natural to feel that way. She added that they would talk about ways for Gloria to get some practice in test taking when they discussed the test results at their next meeting.

Bina explained the communications activity and writing sample

....

"Gloria, to assess your knowledge and skills in communications in a way that is meaningful to your goals, I would like you to try a 'Business Stream' activity. I designed the exercise to assess the abilities of learners, like you, who are interested in post-secondary studies related to business and finance."

....

The communications activity would enable Gloria to demonstrate that she had mastered the communications skills, knowledge and behaviours required for a college-level accounting program. More specifically, Gloria would be demonstrating that she could:

◆ read for various purposes;

◆ present and promote ideas using various forms of communication;

◆ process oral and written forms of communication;

◆ research and use information;

◆ critique her own work and recognize the quality of communication required for success; and

◆ solve communications problems independently and collaboratively.

In an activity integrating reading, writing and oral presentation skills, Gloria would have to:

◆ preview and read business literature;

◆ draw conclusions, make interpretations and respond to what she had read and researched using her critical-thinking skills;

◆ collect, evaluate and summarize information from a piece of business literature and present information based on it;

◆ outline and summarize her own information; and

◆ plan, organize, question and express her ideas clearly and concisely in a writing sample and oral presentation.

The final section of the communications activity would allow Gloria to demonstrate that she could critique her own work as well as edit and revise it after getting Bina's feedback.

As Bina collected her papers, she explained how she had designed the activity:

"As we discussed in Step Three, the accounting program requires a high level of reading, writing, listening, speaking, research, and self-editing skills. So, this communications activity is designed to show how well you can use all of these skills at the same time, as you would as an accounting student. First, you'll read information so that you can answer specific questions and then write a short report about what you've read. I'll be looking for things like organization, sentence variety, grammar, punctuation, and spelling. Then, after you've completed the written report, you'll make a brief oral presentation."

To carry out the reading and research portions of the task, Bina told Gloria that she could choose from different pieces of business literature about a company called Canada Café. Gloria could select either a short magazine article about the company or two pages taken from its annual report. Bina recommended that Gloria choose the piece which seemed the most interesting and the most manageable for her.

Bina gave Gloria two pens, blank sheets of paper and a dictionary to use if she had difficulty with spelling or word meanings. Bina went over the instruction sheet and invited Gloria to ask questions at any time during the activity.

Gloria's instruction sheet

Business Stream Activity: Canada Café

Select either the magazine article about Canada Café or an excerpt from the company's annual report. Read the selection and then complete the two (2) parts of this activity.

PART 1: Did you understand what you read?

Based on what you have read, write answers to the following questions in complete sentences.

1. What is the purpose of the selection you have just read?

2. What is the main idea of the reading selection?

3. The following statements appear in your reading selection. Read each statement and decide whether it is a fact (F) or opinion (O) by circling the appropriate letter.

   Example: Canada Café is delicious. F (O)

   Canada Café is the best coffee money can buy. F O

   Canada Café's profit increased by 22% in 1995. F O

   Canada Café uses 100% Colombian coffee beans to make its 'Timeless Traditions' blend. F O

   Canada Café uses only the best coffee beans to make its 'All-Grind' blend. F O

   Canada Café opened its first 'bookstore' coffee shop in 1996. F O

PART 2: Writing Sample

Based on what you have read, write a short report (two or three paragraphs in length). You might include the following information in your report:

- general information about the company's history, current situation, or future plans;
- specific facts about finances, such as net sales, operating costs, and profits; and
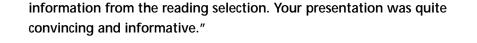- specific information about the company's achievements or setbacks.

Helpful Hints

Remember to include information found in pictures, diagrams and graphs.

You may also find it helpful to follow the time guidelines suggested below:

- Read the selection and complete Part 1 (15 minutes).
- Take notes, organize your information, and write the report for Part 2 (25 minutes).

Gloria prepared an oral presentation

Gloria completed the reading and writing components of the communications activity in about 45 minutes. Bina told Gloria that they would review her writing sample at their next meeting.

"Now, for the next part, I'd like you to prepare a short oral presentation based on the question, *'Why I would, or would not, like to work for Canada Café'*. Take about five minutes to look back on your reading and find information which tells what Canada Café seems to be doing well or not so well. Think of your audience as college students in first-year business studies. Try to convince them that Canada Café would be either a good or bad choice for a future employer."

Gloria skimmed the reading material, took notes, and was ready to present in about five minutes. The following is a segment from Gloria's presentation:

"I think I would like to work for Canada Café because they're doing well. From what I see, their profits have grown, I mean, 'increased' every year for almost five years. Also, they've opened up new cafés and hired new people instead of laying off employees like everyone else seems to do these days."

After Gloria's presentation, Bina asked Gloria what she thought she had done well or where she needed to improve.

"I think I sounded convincing, I mean, I tried to find information in the reading to back up what I said. But, I couldn't stop my voice and hands from shaking."

Smiling, Bina talked about her own observations:

"Actually, I thought you did very well. You maintained eye contact with me, your audience. And you're right, you backed up your opinion with

information from the reading selection. Your presentation was quite convincing and informative."

Bina and Gloria wrapped up the communications activity

To conclude this activity, Bina asked Gloria why she had chosen the excerpt from the annual report instead of the magazine article. Gloria replied:

"The annual report interested me because it looked close to the kind of reading I used to do ... especially when I worked in the office at Voula's Gifts. And, since I buy Canada Café coffee and sometimes meet friends in their coffee shops, I thought I'd enjoy reading about the company."

Bina continued by asking Gloria to talk about what she had found easy or difficult about the communications activity.

Gloria thought it over and said that she had few difficulties with the reading selection overall, but didn't understand some of the technical words. Furthermore, she wasn't sure how well she did on the short-answer section about facts and opinions.

For the most part, Gloria said that she liked doing the writing sample, but found that it was difficult to get started. She told Bina that she used the guidelines on the instruction sheet to help her organize the information. She thought that she had written an interesting report, but felt that she had made many spelling and grammatical errors.

Bina said that she would be looking at Gloria's math test and communications activity and they would discuss them in more detail at their next meeting.

Gloria's competencies in personal and career development

Bina needed to assess Gloria's abilities in effective personal and career development, including her intra/interpersonal, analytical and

employability skills and her ability to plan educational and lifelong learning strategies.

Gloria's communications activity had given her an opportunity to demonstrate her ability to:

◆ choose and employ verbal and non-verbal communications skills relevant to specific situations;

◆ recognize when to use formal or informal conversational style; and

◆ use systematic methods to solve problems, make decisions and set goals.

The math test had given Gloria an opportunity to demonstrate her ability to use systematic methods to analyze information and concepts.

In assessing Gloria's ability to work within a group or a team, Bina told Gloria:

....

"Your work on the assembly line as well as your volunteer work at your kids' school were situations in which you had worked as part of a group or team. Based on all of your experiences, do you think you cooperate and work well with others?"

....

Gloria confidently replied that in all her paid and volunteer work she felt that she had got along well with other workers and her bosses. She mentioned that two of her previous employers had given her reference letters which commented on her ability to work well as a part of a team.

Gloria and Bina then discussed Gloria's employability skills. In particular, they talked about Gloria's ability to make career choices and follow through with an effective job search plan. Gloria's abilities in these areas would be critical to her goals of working in the accounting field and someday having her own bookkeeping business. Bina said:

....

"Basically, Step Two of the goal-directed assessment process gave you an opportunity to begin to set goals and make a career plan which will eventually lead to a new job. Looking back on past job searches, do you think the methods you used were effective? Today, would you do anything differently when planning a job search?

....

Gloria paused to think about these questions before she replied:

....

"In the past, I got all of my jobs through contacts from my family or my friends. Back then, no one ever asked me for a resumé. Today, I'd start by finding out as much as I could about different companies and then learn how to write a good resumé."

....

Bina and Gloria Wrapped Up Step Four

Bina thanked Gloria and indicated that she would be evaluating the math test and the communications activity before they met again. They agreed to meet in three days to discuss:

◆ the results of Gloria's tests and activities;

◆ the skills, knowledge and behaviours Gloria still needed to acquire;

◆ Gloria's goal-related research; and

◆ an action plan to help Gloria meet her goals.

Bina added that she would be summarizing the information which they had gathered so far on Gloria's individualized training plan. They could then finalize the training plan at their final meeting.

Now It's Your Turn

Work with a potential literacy learner to assess current competencies. In doing so, you should:

◆ explain the purpose of each testing activity and how the results will help to create the learner's program of study or action plan;

◆ use the background information you have gathered throughout the goal-directed assessment process to select appropriate assessment methods, tools and levels;

◆ select or create a variety of procedures and instruments and use them to accurately measure the skills, knowledge and behaviours required by individual goals; and

◆ explain the tests thoroughly and ensure that the learner knows what is expected.

Then schedule a second meeting with the learner to complete Step Five of the goal-directed assessment process.

Before the final meeting, you will:

◆ interpret the results of the tests and activities in Step Four;

◆ identify the learner's current competencies and skill gaps;

◆ develop an action plan to help the learner acquire the required competencies;

◆ summarize the information gathered during Steps One, Two, Three, and Four on the individualized training plan, included in Appendix One; and

◆ remind the learner to conduct any goal-related research which you may have discussed in Step Two.

You may find it helpful to use Gloria's training plan as a guide.

Step Five: Identify Skill Gaps and Plan a Training Program

Input To begin Step Five, you will need:

- an assessment of the learner's current competencies with respect to her or his goal requirements.

Process In this chapter, you will learn how to:

- prepare for the final meeting;
- identify the learner's skill gaps;
- suggest a training program;
- finalize the learner's individualized training plan; and
- conclude the goal-directed assessment process.

Results At the end of this chapter, you will be able to:

- complete the goal-directed assessment process by providing the learner with a comprehensive individualized training plan.

Preparing for the Final Meeting

*B*efore your final meeting with the learner, you will interpret the results of any tests or activities completed in Step Four to identify the learner's current achievements.

After evaluating these abilities against those required by the learner's chosen goals, you will have a list of the learner's skill gaps, or the particular competencies she or he still needs to acquire. You will then be able to suggest a training program or training activities.

You will summarize and record this information, as well as the information you gathered during Steps One, Two and Three, on the learner's individualized training plan.

Meeting with the Learner for Step Five

Step Five is the final step in the goal-directed assessment process. When you meet for Step Five, you and the learner will discuss:

◆ the learner's goal-related research, if applicable;

◆ the learner's strengths, as revealed by the assessment activities in Step Four;

◆ the competencies which the learner still needs to improve or acquire to attain individual goals; and

◆ possible training options which will enable the learner to acquire the required skills, knowledge, and behaviours.

Guiding your discussion will be the learner's completed training plan. You and the learner will be reviewing it and making any changes which the learner feels are necessary. The final meeting should take about half an hour.

As in Steps One through Four of the goal-directed assessment process, your role in Step Five will be crucial in helping to create an atmosphere of trust and openness in which the learner participates as a full partner and decision maker.

Identifying the Learner's Skill Gaps

On the one side, you have determined the competencies which the learner needs in order to achieve identified goals; on the other side, you have identified the learner's current abilities. To determine the learner's skill gaps, you will ask yourself:

Ask yourself
- *What intervening or missing competencies must be mastered to bridge the gap between what the learner knows now and what is needed to learn?*

The answer to this question becomes the skills, knowledge, and behaviours which will form the basis of the learner's suggested training program.

For example, an unemployed learner wants to get a job as a sales assistant in an exclusive clothing boutique. In mathematics, he needs to be able to demonstrate his ability to use arithmetic operations correctly and appropriately by:

- adding, subtracting, multiplying, and dividing whole numbers;
- converting fractions to decimals;
- using a calculator to perform basic math operations;
- measuring by using both metric and Imperial systems; and
- using arithmetic abilities to perform the clerical duties of the job.

Having been a skilled tailor in his native country, the learner can already:

- add, subtract, multiply and divide whole numbers;
- convert fractions to decimals; and
- measure by using the metric system;

Therefore, his missing skills include the ability to:

- use a calculator to perform basic math operations;

- ◆ measure by using the Imperial system;
- ◆ use an electronic cash register;
- ◆ keep simple accounts using standard forms.

Planning an Appropriate Training Program

The learner's training program will consist of the learning or training activities required to fill any gaps existing between the learner's current abilities and those required to reach vocational, educational or personal goals. You might begin by asking yourself:

Ask yourself
- ◆ *What instructional steps must the learner take to bring academic knowledge, language skills, and employability skills to the required levels?*
- ◆ *What kinds of training programs will best meet the learner's training needs in light of the learner's goals, background, learning style, obstacles, and required supports?*

The answers to these questions will become the training program which you suggest to the learner. Furthermore, when you discuss the suggested program, you should explain how the program content takes into account the information you discussed throughout the goal-directed assessment process.

Time usually plays an important role in deciding among training programs for literacy learners. Both unemployed and employed learners usually want and need to upgrade their skills and acquire new knowledge as quickly as possible. Consequently, it should also be clear to learners that the suggested training program is the most efficient and effective way to meet or begin to meet their individual and immediate goals.

Discussing Available Training Options

When suggesting possible training options, it is important to consider all the information you gathered during the goal-directed assessment process. In particular, you will need to take into account

the factors which you and the learner discussed in Step One, such as the learner's:

◆ priorities;

◆ formal and informal learning experiences;

◆ preferred learning style;

◆ instructional preference;

◆ time constraints;

◆ financial constraints; and

◆ family and peer support.

....

What we need to learn if we are to reach our own particular goal is different. Why we learn is entirely individual. Each of us learns for reasons which make sense to us, and why we wanted to learn in the past may not be why we wish to learn now. How we learn is distinctive. We learn in ways that suit our temperament and meet our particular needs.[36]

....

Suggesting a variety of program options

Although some learners may fit neatly within existing literacy or basic skills programs, most learners will require modified programs which focus on their specific learning needs and goals. However, the reality is that many literacy education programs focus primarily on the general needs of learners and may not be able to accommodate all needs of all learners. There may also be a mismatch between a program's instructional style and the preferred learning style of the learner.

....

Since expense prohibits developing completely individualized tutorial programs to meet all individual needs, it then becomes necessary to look to the array of program deliverers in a community or region—all of whom have variations in approaches and program strengths. It then becomes possible to offer learners 'blended' formats of instruction.[37]

....

Therefore, you may want to suggest programs which use a variety of program deliverers in a community or region. Once again, it is critical to involve learners in selecting not only the learning content of their program but also the manner in which they will carry it out.

To meet the demands of a new supervisory position, Elysa, a carpenter in a furniture factory, had to be able to write memos and short reports. Elysa's writing sample revealed that she needed to learn how to write complex sentences and to develop well-structured and well-organized paragraphs. She also had to learn how to proofread and edit her work.

As Elysa preferred to learn by listening and interacting with other people, she decided to upgrade her writing skills by participating in a workplace literacy program at her company, supplemented by individual tutorials at a community-based literacy program after work.

You will need to link with education and training providers, networks, and other resources in your community to give learners accurate and comprehensive information about literacy delivery agents, and their services in the area. In some instances you will need to advocate for the learner to access these programs and services.

Putting the Individualized Training Plan into Action

A learner's individualized training plan will be unique. The plan will almost always be distinct from those needed by other learners. Developing and using the learner's training plan helps to ensure that the learner's goals and needs remain the central concern.

For the unemployed learner, the training plan sets out a realistic and attainable training and learning plan which informs instructors, literacy delivery agents, and other stakeholders of the training which the learner requires.

With such information, preparatory ESL and ABE programs have a powerful tool at their disposal. The information ... should enable them to quickly and efficiently provide displaced workers with the particular preparatory skills they require.[38]

In workplace contexts, the information on the learner's training plan will guide instructors as they face the challenge of developing plans and course content which take into account the interests, needs, and

learning goals of many learners, as well as the specific learning needs, of individual learners.

For both unemployed and employed learners, the individualized training plan will provide the baseline information about learners to which they and their instructors can refer as they embark upon a plan of lifelong learning.

Completing Step Five of the Goal-Directed Assessment Process

At the end of Step Five, you and the learner will finalize the learner's training plan, making any changes which the learner requires. You will give a completed copy to the learner. Ideally, the learner will be able to commit to some or all of the suggested training options. Creating an action plan will help to keep the learner focused and 'on track.'

You should also tell learners that they can contact you for help or advice as they work toward achieving their goals.

Working with the Case Study

The next section of the chapter shows Step Five of the goal-directed assessment process 'in action.' As you read about Gloria and Bina, you will observe how they:

◆ discussed the results of the tests and activities Gloria completed in Step Four;

◆ identified Gloria's skill gaps;

◆ decided on a training program;

◆ finalized Gloria's training plan; and

◆ completed the goal-directed assessment process.

CASE STUDY

Gloria's Skill Gaps and Suggested Training Program

Between their first and second meetings, Bina had assessed Gloria's math test and communications activity to identify Gloria's current abilities. Then she had evaluated them against the competencies required by Gloria's goals to determine the particular skills, knowledge, and behaviours which Gloria still needed to acquire. Bina had also completed Gloria's individualized training plan by summarizing the information she had gathered during the goal-directed assessment process.

Gloria and Bina met to conclude the Goal-Directed Assessment Process

When Gloria and Bina met for Step Five, Gloria learned that they would be discussing:

◆ what information she had researched about her goals;
◆ what Step Four had revealed about her current competencies in math, communications and personal and career development;
◆ which skills, knowledge or behaviours she still needed to acquire or improve to attain her goals; and
◆ how she might acquire those competencies.

During their half-hour meeting, they would review Gloria's training plan and make any changes Gloria felt were necessary. They would also finalize a plan to help Gloria reach her goals in the long and short term.

Gloria talked about her research

First, Gloria was asked about her 'research'— what she had found out about accounting in today's businesses. Using the list of business people Bina had provided in Step Two, Gloria had contacted three

companies to ask about entry-level accounting and bookkeeping jobs. Referring to her notes, Gloria remarked:

"Everyone was really helpful and honest. In fact, two employees warned me that, at times, accounting work could seem repetitive and even boring. I learned that all three companies were computerized and used many software programs. Business hours were usually 9:00 to 5:00, but some employees had to work overtime when they had heavy workloads. In busy periods, the companies contracted work to self-employed   accountants or bookkeepers. I was happy to find out that many of the employees were graduates from college accounting programs."

When asked if she would be satisfied with those working conditions, Gloria replied:

"I'm used to a full work day and I don't mind doing routine work. And, even though the money's not great, I think I could manage until I got more experience and earned a better salary. The more I think about it, Bina, the more accounting feels like the right career for me."

Bina and Gloria discussed the results of Gloria's math test

"It's good that you still feel strongly about a career in accounting. And, from the results of your math test, accounting seems to be a very suitable and attainable goal for you. Let's go over the results together."

Referring to Gloria's training plan, Bina pointed out that Gloria had demonstrated that she could use basic math skills, including whole numbers, fractions, decimals and percents. Not surprising to Gloria, she had done particularly well on word problems based on situations requiring business math operations. Bina continued:

"However, the metric system is still something you will have to learn. You'll also have to improve your ability to use powers and exponential

and scientific notation. And, as you had suspected, you had a lot of trouble answering the algebra questions."

Bina continued by telling Gloria that any math upgrading she undertook should also include:

◆ converting verbal into algebraic statements;
◆ solving linear equations by analytical and graphical means;
◆ solving equations of variation; and
◆ applying deductive reasoning to analyze and solve problems.

Bina and Gloria discussed the communications activity

"On the whole, you did very well on the communications activity. As we discussed during Step Four, your abilities to present information orally are quite strong. Your experience as an interpreter for new employees at your last job gave you good practice. Furthermore, I noticed that you made some rough notes before giving your oral presentation and answering the short-answer questions. You also referred back to those notes as you prepared your writing sample. You seem to approach tasks in an organized way."

In the short-answer section of the activity, Gloria had been able to identify the purpose and the main idea of the reading selection. She was also able to differentiate between facts and opinions in four out of the five statements she was given.

Bina told Gloria that her writing sample revealed her ability to:

◆ use critical-thinking skills to make logical inferences and draw conclusions; and
◆ read, interpret, and use information given in graphic representations.

"To succeed in the accounting program, I'd suggest you get as much reading practice as possible beforehand — researching, reading and using information from a wide variety of business materials, such as

accounting textbooks, financial documents, and business literature. And, since you found some of the technical words in the reading difficult, it would also be helpful to work on business and financial vocabulary."

Bina gave Gloria feedback about her writing sample

Together, Gloria and Bina proceeded to focus on Gloria's writing sample about Canada Café.

A Report on Canada Café by Gloria Macri

I am ~~surprised~~ impressed by the Canada Café Co. because they run several companies and because of its many products for customers. When I read about the coffee company. I found out that they had been in business since 1956 and in six months became a market leader especially in Toronto and Montreal stores. They have used the jingle now for forty years.

Today, they sell their best known product called All Grind Coffee and ~~has~~ have expanded their coffee to Canada Café Blend and L'Exclusif in regular and decaffinated blends. Also, an actual café called Canada Café that serves baked goods, sandwiches and finer foods. They also have another new restaurant called Café Vite for drive thru service and the company plan to expand their Café Vite franchises to 23 more locations over the next few years. Canada Café has another company called "Tradition" which sell coffee, tea and spice to restaurants, lodging facilities and health care facilities. Canada Café also has a "warehouse on wheels" which has every item in stock on trucks for fast service and if customers want to buy things like packaged cookies at the last minute.

I felt that Canada Café is doing very good business especially since there net sales were $328,378,000 in 1996 and only $254,082,000 in 1994. The graph on page 2 showed that their Opening profit in 1995 were 15,619,000 and only $8,261,000 in 1994. At their Year End July 31, 1995, Total Current Assets of $116,555,872 and only $26,906,633 in Total Current Liabilities. As you can see there profits are outwieghing their losses, so Canada Café people are not in danger of losing there shirts any time soon.

Bina assessed Gloria's writing sample in three main areas:

◆ organization and development;

◆ voice, vocabulary and sentence variety; and

◆ grammar and mechanics.

Using a scale of 'definitely,' 'to some degree,' and 'not at all,' some of the kinds of questions Bina had used were:

◆ *Was there evidence of planning, such as an outline or point-form notes?*

◆ *Was there a clear organizational pattern with a beginning, a middle and an end?*

◆ *Did the writer use details or factual data to back up opinions and arguments and convince the reader?*

◆ *Were resources used appropriately to support the report or presentation?*

◆ *Did the writer use information from words as well as from graphic representations?*

◆ *Was the voice clear and confident?*

◆ *Was the vocabulary appropriate to the task, audience, and purpose?*

◆ *Did the writer use a full range of sentence styles?*

◆ *Did the writer apply the core features of grammar correctly in:*
   spelling?
   punctuation?
   subject-verb agreement?
   sentence fragments?
   run-on sentences?
   parallel constructions?

(Adapted from the Writing Sample Assessment Scale, George Brown College)

Bina told Gloria that she had enjoyed reading her report on Canada Café. She felt that the writing sample would certainly inform and convince an audience of college accounting students. Focusing first on *organization and development*, Bina commented that there was evidence of planning in the notes Gloria had taken

beforehand. Overall, her ideas were arranged in a logical order with a beginning, a middle and an end. Furthermore, Gloria had used many facts to support her main idea.

"Your writing sample told me a lot about the company's activities. You organized it clearly and chose your supporting details carefully. I was impressed with your ability to use graphs and charts to conclude that Canada Café was financially stable."

Bina told Gloria that she had a good command of written English, but that she needed to improve in a few areas and get more practice. Focusing on voice, vocabulary and sentence variety, and grammar and mechanics, she continued:

"Although you communicated your ideas clearly, you'll want to improve your ability to vary the kinds of words and sentences you use. Where you need to focus, though, is on grammar and spelling. Improving in these areas will help you to succeed in the accounting program and in your long-term goal."

Pointing to specific sections of Gloria's writing sample, Bina told Gloria that she needed to work on some of the core features of grammar, such as sentence fragments, run-on sentences, and subject-verb agreements. She also commented on Gloria's spelling.

"For example, in some instances, you left out a letter, such as 'figer' instead of 'finger'. In other cases, you used a word that sounded like another word but, was spelled differently, such as 'there' instead of 'their'. You also copied some words incorrectly, such as 'fascilities'. Is there anything you'd like to add?"

Gloria chimed in:

"I think I knew how to do some of those things, but the problem was that I thought ahead of what I was writing and then didn't go back and

check what I wrote. I'll definitely have to sharpen those skills before I go to college."

Bina went on to explain that an important requirement for post-secondary studies was Gloria's ability to critique and correct her own work. Bina added:

"In the accounting program, you'll need to reread what you have written many times to look for errors and ways to improve it. You'll also want to be able to use feedback from other classmates and your instructor — just like we're doing now. You'll have to revise your work and come up with a polished product. You should try to get some practice in those areas before returning to school."

Gloria and Bina discussed Gloria's personal and career development

Bina commented that Gloria appeared to have many of the intra/interpersonal, analytical, and employability skills needed to succeed in a post-secondary program, start a career in accounting or bookkeeping and eventually open up her own business. She said:

"From your work, volunteer, and family experiences, you've developed strong organizational and time management skills. However, since you've been out of the classroom for a while, you'll need to work on your study skills. You'll also have to develop an effective job search and career plan which will get you the job you want in the short term and your own business in the long term."

Gloria and Bina Mapped Out a Plan

"Gloria, as the accounting program starts in three months, we don't have a lot of time. So, you should apply to the college immediately. I can send a note with your application to request a letter of confirmation and an admissions test as soon as possible. Then you

should apply to the Ontario Student Assistance Plan (OSAP) for your loan, so you can plan for the remaining months of your program when you won't be receiving any Employment Insurance. You can pick up both applications at the college registrar's office."

Gloria learned about her options

Bina advised Gloria to enrol in an upgrading program at the college or at her local high school. She mentioned that Gloria could also work on a one-to-one basis with a tutor at a community-based literacy program.

The programs would enable Gloria to improve the math and communications skills identified on her training plan. Moreover, working on her test-taking and study skills would help Gloria to prepare for the admissions test and for success as an accounting student. Bina added:

"The information in your training plan will inform any training provider about your learning needs in relation to your long- and short-term goals. And since your training plan indicates what your training program should include, it will keep you focused and on track."

Upon hearing her options, Gloria replied:

"I think I'd like to find out more about the college's upgrading program. The college is right down the street from my house, so I wouldn't have to spend a lot of time and money on buses. And since my goal is to get into an accounting program at the college, the program would give me a feel for what it's like to be a college student."

Bina told Gloria that her next step was to take the college admissions tests on her assigned date and wait for the results. Giving Gloria a copy of the college's *Testing Information Booklet,* Bina suggested that Gloria practice the sample questions and attend the college's weekly test orientation sessions. Bina continued:

> "If you pass the admissions test the first time and are admitted to the accounting program, you can use the next three months to attend a learning program to strengthen your skills. I think that learners benefit from as much preparation as possible when faced with new experiences. If you'd like, I could also arrange for you to meet with the program coordinator and sit in on a couple of classes."

Gloria expressed her concerns

Gloria agreed that even if she were to pass the admissions test, she would feel more comfortable having improved her skills and having had some practice and experience in the classroom before the program started. However, she asked:

> "What are my options if I don't pass the test the first time?"

Bina said that Gloria could then focus on improving her math and communications skills and, in particular, her test-taking skills before taking the admissions test again. Bina advised Gloria:

> "Your biggest challenge is going to be timing — some of which is beyond your control. So I strongly advise you to start your academic upgrading as soon as possible. It will help you in both the long and short term. Your safest bet would be using any waiting periods to learn and practice."

Naturally, Gloria had some concerns about her plans. She queried:

> "What if I don't get into the college's accounting program?"

Encouraging Gloria to think positively about her abilities and background, Bina reminded her that she had performed very well throughout her goal-directed assessment. She did particularly well on the activities in Step Four — considering that she had not been in any academic or testing situations for a long time. However, Bina

recognized Gloria's concerns and suggested other options for accounting training:

"Some accounting or business-related courses are offered through correspondence education or at private learning institutions. You might also consider taking a few part-time accounting courses at the college which you could apply to a diploma later on. Single-credit courses won't give you everything needed for a career in accounting, but could bring you closer to getting a job in the field."

Bina also gave Gloria some suggestions for meeting her long-term goal for a home-based business.

"The college also offers a one-semester course called 'Starting Your Own Business' and I know that the local community centre offers one-day seminars in small business management for a nominal fee. These are all options for you, if and when you need them."

Completing the Goal-Directed Assessment Process

At the end of the session, Bina gave Gloria a copy of her completed individualized training plan as well as some relevant names and phone numbers of college staff. Gloria had asked for some books about starting her own business, so Bina included a bibliography of self-help books on that subject. Bina told Gloria that she would be sending a copy of Gloria's training plan to her Employment Insurance counsellor.

As Gloria stood up to leave, Bina concluded:

"Gloria, you're almost always guaranteed success if you work toward specific and realistic goals. I believe that your goals are certainly realistic and attainable. In working through the goal-directed assessment process, you've come up with a good training plan that should work for you now and in the future. I wish you all the best. If there's anything

else I can help you with, please contact me. And, keep in touch to let me know how you're doing."

....

Gloria smiled broadly and expressed her satisfaction with her training plan and with the goal-directed assessment process in general:

....

"I'm really happy with the way the assessment worked out. I enjoyed working with you on it. And I agree, everything I need to do to reach my goals seems manageable and possible."

....

Now It's Your Turn

Working with a potential literacy learner, review and then finalize the learner's individualized training plan which you prepared before your final meeting. In doing so, you and the learner will:

◆ review your assessment of the learner's current competencies;

◆ identify the skills, knowledge and behaviours which the learner still needs to acquire to meet her or his goals;

◆ discuss a training program and possible training providers; and

◆ determine the specific steps which the learner needs to take in both the short and long term.

You might find it helpful to use Gloria's completed training plan as a guide.

As you conclude the goal-directed assessment process, try to have the learner commit to some or all of the suggested training options. When giving the learner a copy of the completed training plan, mention that you are available for future help or advice.

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Personal Information

Name: Gloria Macri

Address: 1000 Main Street. Apt. 6
Thunder Bay, Ontario P7C 4N1

Telephone: (807) 345-0000

Additional:

General Information

Date of Assessment: May 30, 1997

Assessor: Bina Kapoor

Company: Lucky's Manufacturing

Location: Thunder Bay, Ontario

Additional: E.T. - 37 weeks remaining

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Background Information

Short-term Goal

1 year college-level accounting program leading to a job in accounting or bookkeeping.

Long-term Goal

Self-employed bookkeeper operating out of own home.

Goal Requirements

Communications - Read/use critical thinking skills to understand manuals, reports, letters, memos. Read/research information from financial statements, graphs, charts and tables. Express points of view and factual information using various forms of communication. Critique own work - edit according to feedback. Take organized notes and brainstorm ideas. Demonstrate good grasp of elements of written and spoken English.

Mathematics - Use basic math to perform more advanced functions - Perform operations using whole numbers, decimals, fractions, percents, metric, signed nos. square roots, powers, scientific notation, exponential expressions, algebra, equations & formulas. Understand math terms like variables, direct inverse & compound variation. Use algebra to solve applied word problems. Use basic math to solve business/personal/financial problems.

Personal and Career Development - Work with peers, instructors, counsellors, coworkers, clients. Contribute to discussions by analyzing/interpreting ideas while stating & supporting own viewpoint. Respond to criticism & differing views. Develop effective learning strategies, such as time management and study skills. Develop career plans and study search.

Science - N/A

Learning Achievements

Communications - Reads/understands business literature. Reads, interprets and uses information in graphs. Uses critical-thinking skills to make logical inferences and draw conclusions. Identifies main idea/purpose & distinguishes between fact & opinion. Good oral presentation skills. Voice clear & confident. Writes well, arranges ideas logically, uses facts & appropriate vocab. Good note-taking skills. Uses facts to support & develops ideas logically.

Mathematics - Uses basic math skills for some advanced functions, to perform operations involving whole numbers, fractions, decimals and percents. Understands basic algebra. Solves basic word problems requiring business math. Demonstrates some ability to use powers and exponential and scientific notation.

Personal and Career Development - Works well as part of a team and gets along with those in positions of authority, coworkers and peers. Strong organizational and time-management skills.

Science - N/A

INDIVIDUAL TRAINING AND LEARNING PLAN (ITLP)

Date Completed

Training Program

Communications Read/research information from a broad range of business, accounting & financial documents
- Read/research from graphic representations
- Acquire business and financial vocabulary
- Expand variety of words & sentence styles in oral presentations and academic & business writing
- Improve core features of grammar, sentence fragments, run-on sentences and subject-verb agreement - improve spelling - critique and correct own work.

Mathematics - Perform operations using metric, signed numbers, square roots, powers, scientific notation, exponential expressions, algebra equations and formulas - Study math terms, deductive reasoning, like terms, variables, direct inverse and compound variation. Use algebra to solve applied word problems by converting verbal into algebraic statements, solving linear equations by analytical & graphical means, solving equations & variations & using deductive reasoning to analyze/solve probs.

Personal and Career Development
- Improve on study skills
- Improve test taking skills
- Practice responding to other points of view and expressing own opinion
- Acquire job search techniques
- Formulate career plans

Science ___N/A___

Action Plan

Preferred Training for Upgrading Communications, mathematics, test taking + study skills: community college. Supplementary in core features of grammar: community agency.

Learner's Tasks
- Apply to college for admission to accounting ☐
- Contact OSAP about assistance ☐
- Enrol in college's upgrading program + work with tutor ☐
- Sit in on accounting program classes ☐
- Prepare for admissions test ☐
- Take test on assigned date ☐
- If admitted, continue to upgrade skills ☐
- If not admitted, contact college counsellor for info on other accounting-related courses ☐
- Get information about unemployment and job counselling services ☐
- Get computer exposure training ☐

Assessor's Tasks
- Send letter to college requesting confirmation ☐
- Give learner samples of curriculum material ☐
- Arrange for learner to audit classes ☐
- Give learner list of local literacy deliverers ☐
- Provide learner with small bus. ref. list ☐
- Give learner names of community organizations offering peer counselling ☐

Assessor's Signature _Oria Kapoor_
Learner's Signature _Gloria Macri_

Appendix One: Blank Individualized Training Plan

Personal Information

Name

Address

Telephone

Additional

General Information

Date of Assessment

Assessor

Company

Location

Additional

Background Information

Educational Experiences and Strengths

Work History and Strengths

Transferrable Skills

Preferred Learning Style

Obstacles and Challenges

Required Supports

Source: Goal Directed Assessment: An Initial Assessment Process.

Short-term Goal

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Long-term Goal

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Goal Requirements

Communications

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Mathematics

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Personal and Career Development

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Science

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Learning Achievements

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Personal and Career Development

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Science

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Source: Goal Directed Assessment: An Initial Assessment Process.

Training Program

Date Completed

Communications

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Mathematics

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Personal and Career Development

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Science

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Action Plan

Preferred Training for Upgrading

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Learner's Tasks

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Assessor's Tasks

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Assessor's Signature

Learner's Signature

Source: Goal Directed Assessment: An Initial Assessment Process.

Appendix Two: References

References

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