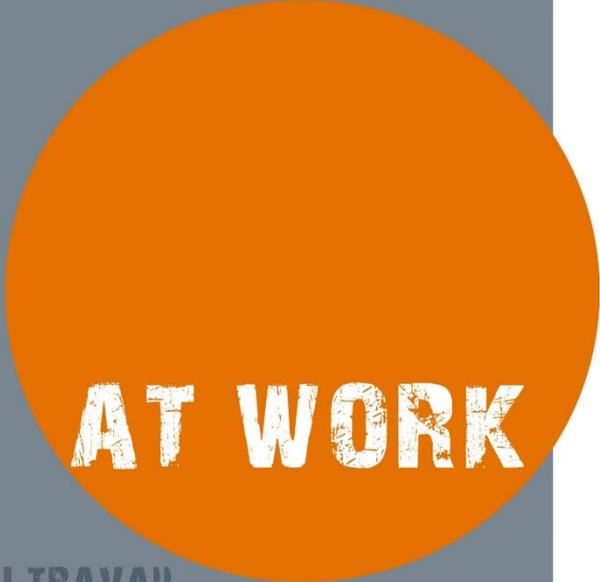


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**LITERACY AT WORK**  
**WORKPLACE LITERACY**  
**BASISBILDUNG IM BERUF**  
**LES COMPETENCES CLES AU TRAVAIL**

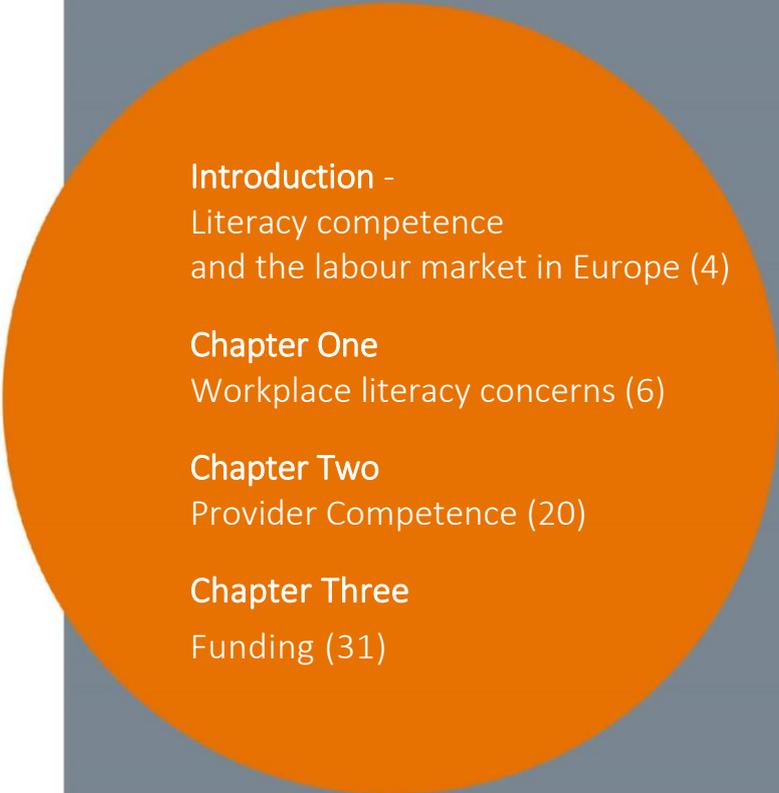


EUROPEAN  
METHODOLOGICAL GUIDE



# PART ONE

IDENTIFYING  
AND SHARING THE NEEDS



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# Introduction - Literacy competence and the labour market in Europe

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As early as 2002 the European Parliament stated in the report on illiteracy and social exclusion:

“Thus while illiteracy, defined as the total inability to read and write, has now been almost completely eradicated in Europe, the phenomenon of 'functional illiteracy' is becoming increasingly serious. In economic terms, illiteracy generates additional costs for undertakings and affects their ability to modernize. These extra costs are linked to high accident rates, extra salary costs to offset the lack of skills of individual employees and extra time for supplementary personnel supervision; further costs result from the non-production of wealth linked to the absence of optimal qualifications. The employability deficit also has an impact on workers themselves. Apart from the industrial accidents it causes, illiteracy is a source of absenteeism and demotivation.”

[Source: EUROPEAN PARLIAMENT, Committee on Employment and Social Affairs, REPORT on illiteracy and social exclusion, A5-0009/2002, 15 January 2002]



“...the Lisbon strategy, aimed at making the European Union the leading knowledge-based economy in the world, has tended to target the best qualified; however, a knowledge- and innovation-based society cannot be founded only on a vanguard of highly-qualified professionals: the entire labour market must master the key skills enabling lifelong learning and training. Moreover, Lisbon’s economic targets cannot be reached if pockets of quasi under-development persist within the EU. Combating functional illiteracy is thus also an economic imperative for the EU.”

[Committee of the Regions on combating functional illiteracy — an ambitious European strategy for preventing exclusion and promoting personal fulfilment, 2010/C 175/07]

“One in five 15-year-olds in Europe, as well as many adults, lack basic reading and writing skills, which makes it harder for them to find a job and puts them at risk of social exclusion.

For adults the need for action is just as urgent. Almost 80 million adults in Europe – a third of the workforce – have only low or basic skills, but estimates show that the share of jobs requiring high qualifications will increase to 35% by the end of the decade, compared to 29% now. Reading and writing are essential skills, not least as they are the key to further learning.”

[Press release European Union, Reference: IP/11/115, Date: 01/02/2011]

# Chapter One

## Workplace literacy concerns

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For a relatively high percentage of EU individuals, insufficient literacy and numeracy skills often lead to exclusion from social and occupational participation, even to a loss of employment in the worst cases.

This is often due to increasingly complex job requirements even in sectors with low-qualification demands (see an example below from the cleaning industry).

As the 21st century is characterized by the on-going change from an industrial society to a “knowledge society”, the so called “up-skilling” of employees and the need for higher qualification levels is evident across Europe. It is in this context that individuals of today, and of the future, require a good standard of basic education to enable them to access the job market as well as to participate in vocational (further) training and in the process of lifelong learning.

General education and vocational training systems in most European countries are not significantly prepared to provide adults with the necessary literacy and numeracy skills directly linked to technical and vocational requirements (workplace literacy training).

In the past, literacy was considered to be the ability to read and write. Today the meaning of literacy has changed to reflect changes in society and the skills needed by individuals to participate fully in society (and in the labour market). It involves listening, speaking, reading, writing, numeracy, critical thinking, and the ability to problem solve and use everyday technology to communicate and handle information.

There are good reasons why basic education forms the core of UNESCO’s Education for All (EFA) programme – it is the chief prerequisite for participation in social and working life and lifelong learning; a good basic education empowers individuals to overcome challenges in their private lives and at work, and to make use of opportunities for further training and education. Countries with a high level of basic education are better prepared for the developments and challenges within a knowledge society.

[UNESCO, [www.unesco.org/new/en/education/themes/education-building-blocks/literacy](http://www.unesco.org/new/en/education/themes/education-building-blocks/literacy)]

In addition, the limited working capacity not only produces additional costs for the company, but also affects the employees themselves. Apart from possible accidents at work, a lack of basic education can also lead to demotivation and absenteeism.

For all these reasons, basic education and workplace literacy are increasingly gaining in importance.

## What is workplace literacy?

Workplace literacy includes Oral Communication (Speaking and Listening), Written Communication (Reading and Writing), Numeracy, Critical Thinking and Digital Competence that people need at work.

In the workplace, literacy - especially reading skills - does not mean reading books or writing essays like in school. Workplace literacy refers to real work demands based on the real documents people encounter on the job and in vocational training, e.g. health and safety manuals, machine specifications, shift notes, quality records, tables and graphs, operator instructions, standard operating procedures and log books.

Employees need reading, writing, speaking and listening, numeracy, problem solving and critical thinking skills (and sometimes basic digital competence) to carry out their jobs well and to understand why processes work the way they do. They need even more literacy skills to get through vocational training units such as induction and health and safety training.

Workplace literacy skills are often described separately but used together. For example, you need to combine reading, writing and numeracy skills when you:

- Listen to a team leader's instructions about a change in an order
- Read a job specification that has both text and numbers in charts or tables
- Talk about the information to a co-worker
- Understand the underlying numeracy concepts such as weights and measures, tolerances or temperatures
- Read data from a gauge or dial
- Record the numerical results in writing

For example, you need to combine your ability to situate yourself in space and time with your critical thinking ability when you:

- situate yourself in your working environment
- identify the various agents' responsibilities and competencies
- understand the workplace organisation

## Which workers/employees does it concern?

Employees involved in the core skills training programs come up against several learning issues (linguistic issues, literacy-related issues, basic skills issues, etc.).



Employees in a situation of functional illiteracy are less visible and are often subject to numerous preconceived notions. It is therefore very difficult to obtain reliable and precise figures on functional illiteracy rates according to country, professional sector, business type or even socio-professional categories despite several surveys carried out in France and Germany, for instance.

Nevertheless, it is possible to observe several facts concerning functional illiteracy:

- Though several professional sectors are more likely to encounter this issue (several industries including the Cleaning and Care sector, Construction, etc.), it concerns a lot of different roles in many different companies.

- Most of the employees that lack literacy skills are unqualified workers. Nevertheless, this issue is also present among the supervisory staff (team leaders and managers).
- Often this target group remains unnoticed, because quite often the concerned employees have achieved a higher-level, technical command of their tasks through experience and routine. Moreover, it is likely that they are faultless in terms of behaviour at work (punctuality, attention, low absenteeism, etc.), partly because they don't want to attract attention to the difficulties they experience linked to an insufficient command of core skills.

The lack of literacy skills has become more noticeable since the evolution of the workplace's demands in terms of quality, traceability, professional writing, and as regards to the increased use of digital tools and technology. Indeed, more and more often, employees need to be able to read complex procedures and fill in complex documents, even in jobs where oral communication used to be predominant.

## Literacy skills for vocational (further) training

Training itself often requires a higher level of reading and writing than is needed on the job because new information is usually presented in writing.

People need to read and write more when they are doing training or unit standard assessment activities than they do on the job. A training course might require people to read notes on a whiteboard and summarise the tutor's key points in writing.

This is often the case with theory and health and safety-related information. Reading workbooks or self-study material can be particularly difficult for people who are not confident readers or who have not been in formal training for a long time.

Some training material is written in quite formal language, different from the sorts of reading people may do on the job, such as informal shift notes or very short bullet points on a form.

The training material might include diagrams and charts that may not be used on the job and these are not always carefully explained. Some training material is harder to read than it needs to be because it is not clearly laid out.

## Workplace literacy demands vary in different contexts

Employees are likely to have more skills in some areas than in others. For example, a person's reading may be better than their writing, or someone may be good at problem solving and maths on the job but not as confident at writing or speaking in meetings.



If people don't understand or pass on information by reading and writing, their ability to speak and listen is vital. Understanding production processes and problem solving may require an understanding of numeracy concepts that some employees simply don't have.

Different jobs require different levels of literacy. The frequency with which someone has to read and write or use numeracy skills differs, as does the degree of supervision they have when they do it. The complexity of what has to be read or written also varies between roles and between companies.

The literacy demands of a particular role will change from industry to industry and from company to company. This means for example that in one company an employee may have to deal with more complex texts with less support and supervision than someone in another company.

Sometimes people need higher-level reading skills, not because their jobs specifically require it, but because what they have to read is made complicated and difficult through poor design or unnecessarily complex writing.

Finally, as said before, the demand has strongly increased in the past decade, with the expansion of request in terms of quality, hygiene and traceability, in all professional sectors.

## Issues and benefits for companies

In order for businesses to stay competitive, they need to retain and support the development of reliable employees (even the low-skilled). In ensuring that employees constantly receive (further) training and qualification, the full potential of a company can be realised.

Workplace literacy and the offer of appropriate further training therefore play significant roles in the creation of value.

Above all, workplace literacy becomes a deciding factor when there is a discrepancy between the workplace requirements and an employee's skills profile.

Internal workplace literacy training can offer a company many advantages:

- Company internal workplace literacy training programmes are custom designed for specific companies and take into account the current needs and challenges of each business.
- Workplace literacy training can easily be adapted, in terms of content, method, delivery, duration, timing etc., to the needs of a company and its employees.
- Adapting training content to different needs is more cost effective than standardised training. Holding the training on site further reduces the overall costs (employees do not lose time by going to the training centre, the company doesn't need to rent rooms, etc.).
- Real life work scenarios can be analysed in training. The resulting knowledge can be transferred, and directly applied to regular day-to-day work.

Additionally, experience shows that businesses have profited from furthering employees' basic skills, both in the medium and the long term:

- Making better use of an employee's potential in terms of learning and performance leads to increased performance.
- Targeted training and development leads to employees being more flexible and able to take on different tasks within the company.
- Increased levels of competence reduce the time needed to retrain employees for new tasks or functions within the company.
- Targeted training and increased levels of competence among employees will improve the quality of work processes, resulting in fewer mistakes and a reduction in accidents.
- Employees will feel more secure and more confident in taking the initiative to voice any questions they have in case of uncertainty. This has a positive effect on a company's internal communication and the exchange of information.

## Issues and benefits for employees

Training is carried out within the company and is specifically designed for the employees and their workplace requirements:



Employees are more qualified and competent, and can directly apply their newfound knowledge and skills to their daily work and personal lives.

Thanks to their newly gained competence, employees are more independent in carrying out their work and less reliant on seeking help from their colleagues. They feel more secure and independent, are less anxious and feel confident in taking on more responsibility when carrying out tasks at work.

The targeted development of their competence will enable employees to be deployed more flexibly and – given the need – take on new roles within the company.

Employees will discover an interest and find enjoyment in learning, as they achieve positive learning results and are able to apply what they have learned in their work and daily lives.

More knowledge and competence, along with new tasks and challenges, will make employees more motivated at work.

Employees feel they are being taken seriously, as offers of further training show them a sense of appreciation and recognition.

More competence, self-confidence and less apprehension about new tasks or unforeseen situations, all lead to less stress at work and therefore a “healthier” working environment.

## Higher demands in so called low-qualified jobs

### **Example Germany - Care worker (German: Pflegehilfskräfte)**

Care workers support higher-level nursing professionals and tasks in-house or in a mobile, home-support context. Care work offers introductory employment opportunities for young people and those re-entering the labour market wanting flexible employment terms.

Care workers provide basic support for people, who either temporarily or permanently, cannot perform basic tasks themselves. These tasks range from cooking and cleaning to basic medical and personal care tasks and everyday household chores.



Care workers also carry out essential tasks to enable other professionals to carry out more vital duties. Their role is supportive, not only of the patient or cared-for person but also for the other people in the caring team.

The following information about literacy competencies needed for executing this job is to be used as a guideline only for the basic role of carer and care worker in different contexts that apply across Europe. There will be areas of health care that differ from these examples but that share commonality in relation to literacy and the basic skills required to perform the role.

Literacy on the job: READING		
VERY FREQUENTLY	FREQUENTLY	FROM TIME TO TIME
Health and safety signage Warning signs in operational areas Medical / Patient care plans Weekly work plans / Rotas Patient lists and updates (inc. addresses for community carers) Communications from colleagues / wider team correspondence	Health and safety information sheets Personal hygiene rules (clothing, shoes, body care, availability and disease prevention) Safety rules and regulations in regard to electrical equipment (operational guidelines, mains cables) Reading patient messages, household bills, emails, SMS and letters Specific food recipes Operational instructions for equipment Reading meeting minutes and communications	Working policy changes and professional updates Professional development and training Working terms and conditions of the company: e.g. working hours, place of work, job function, holidays, sickness-/accident reporting and pensions Awareness of COSHH, Health and Safety, infection control regulations General accident prevention rules and regulations (rights and duties of the employer and the employee) General rules relating to patient care and confidentiality Storage regulations for medicines Disposal regulations for waste materials
Literacy on the job: WRITING		
VERY FREQUENTLY	FREQUENTLY	FROM TIME TO TIME
Documentation of the results of work (diary of work completed) Fill out timesheets and annual leave forms Stocktaking and reporting condition of medical equipment Handover notes for wider care teams, instructions and guidance Contribute to Medical / Patient care plans Communication to colleague / wider team	Writing patient messages Compiling shopping lists (community carers) Formulate recipes (community carers) Compile and update stock lists and inventories Composing family or friend; letters, emails, SMS Patient status reports	Professional development and training Record registering, reporting and assessment of incidents and injuries Multi Agency reporting documents (Police, Ambulance) Composing family or friend; letters, emails, SMS Helping with puzzles Costing and lists of home improvements
Literacy on the job: SPEAKING AND LISTENING		
VERY FREQUENTLY	REQUENTLY	FROM TIME TO TIME
Talk to the patient and/or family Talk to other colleagues to coordinate tasks Communicate work issues to team members Listen and respond to verbal instructions and explanations from the supervisor Ask clarifying questions to check the information given Communicate and coordinate with other agencies and disciplines working in the same area of with same patient	Order medicines or equipment from suppliers (face-to-face and over the phone) Participate in team meetings Report to manager about anything affecting the patient care or tasks Request assistance from others Listening to technical information (Operating sensitive equipment and care devices)	Discuss problems with a care plan with supervisor or other team members Safety precautions: mention the rules and inform others Be vigilant relating to sensitive care and patient issues Give clear record of events to senior staff and other agencies (Police, Ambulance) Speak to patient neighbours (community carers)

<b>Literacy on the job: NUMERACY</b>		
<b>VERY FREQUENTLY</b>	<b>FREQUENTLY</b>	<b>FROM TIME TO TIME</b>
Make accurate weights and measurements Check patient and ambient temperatures Monitor patient changes (e.g. weight, temperature) Count and monitor Tablets and Capsules, Measure and monitor Liquid Medicines Monitor patient meal times/guidelines	Estimate the time needed to get to patients (community carers) Calculate costs of household items and groceries (community carers) Calculation of working hours, hourly wage, overtime Time, weights and measures for preparing food Plan the working day based on tasks	Timesheets / Wage calculation procedure Conversions between imperial and metric for cooking Measure and monitor IV Infusions Measure and monitor Injections Telephony Household meter readings (community carers)
<b>Literacy on the job: CRITICAL THINKING</b>		
<b>VERY FREQUENTLY</b>	<b>FREQUENTLY</b>	<b>FROM TIME TO TIME</b>
Decision to do a job by yourself or request help from others Evaluate sensitivity of situations Choose the best and most efficient methods to complete a task Multitasking, gather patient information whilst working Plan and implement the plan for situations Evaluate and make adjustments to the plan. Anticipate the next situation.	Deal with changes to care plans Discuss and agree on changes to care plans Identify if changes, situations or incidents need to be referred to managers, supervisors and team members Identify problems and develop solutions Deal with concerned relatives Consider / protect patient dignity Consider / protect patient confidentiality Initial assessment of situations,	Deal with unexpected issues and emergency situations Act / react instantly based on training with impartiality Deal with contingencies e.g. problems with equipment, personal injury or accidents Deal with delirious and/or dangerous patients Cope with death Prioritising interventions Awareness of patient rights, religious and cultural beliefs.
<b>Literacy on the job: INFORMATION COMMUNICATION TECHNOLOGY</b>		
<b>VERY FREQUENTLY</b>	<b>FREQUENTLY</b>	<b>FROM TIME TO TIME</b>
Using computer to make and share appointments/ diaries Use Smart device to communicate with staff/patients (pager, Smartphone, Tablet) Use of GPS to find patients addresses (community carers) Operate and interact with modern digital medical equipment	Using computer to aid to stocktaking Using computer to update on meetings, agendas and communications from other staff Using computer to order supplies Using computer, internet, and email to shop online for patients (community carers) Set up personalised communication and entertainment systems for patients	Use the internet to research Health Issues/Policy Use Social Media to help patients contact family/friends (community carers) To test own skills and job related updates and developments Operate standard household devices e.g. thermostat, catering and entertainment (community carers)

[Source: This literacy profile was developed in the Leonardo da Vinci project “Literacy and Vocation”, [www.literacy-and-vocation.eu](http://www.literacy-and-vocation.eu)]

## Higher demands in so called low-qualified jobs due to quality procedures

### **Example Germany - Cleaning staff** (without vocational qualification)

The increasing introduction of certified quality assurance has led to literacy requirements for cleaning staff as well. These are often underestimated, and can present serious problems for workers with low literacy levels.

Certified quality assurance requires cleaning companies to describe and regularly document all relevant aspects of its operations. Additionally, norms, regulations, instructions etc. are recorded. There is an obligation to keep records, which the cleaning staff also needs to keep.

Work processes are documented for quality control, i.e. the sequencing of tasks, choice of utensils or machines and adherence to regulations, as are the results, i.e. appearance/cleanliness, timely completion and customer satisfaction.

The documentation enables completed work to be checked through an “objective” control method. Each task that is carried out is recorded, which requires checklists and other documents to be filled out. There are service specifications for each customer, which set out regular services, other tasks and special services, times and prices in detail.

The cleaning staff needs to be able to view the service specifications at all times, usually set out in a table and displayed on the premises:

- Description of the premises (e.g. office building, doctor’s surgery, supermarket)
- Address and location of the premises
- Customer point of contact in case of emergencies
- Function of the rooms within the premises (offices, staff kitchen, sanitary facilities)
- Surface areas to be cleaned in m<sup>2</sup>
- Furniture and furnishings, e.g. number of chairs, desks, etc.
- Open spaces
- Type of cleaning (e.g. visible surfaces only, maintenance cleaning) and cleaning method (vacuuming wet or dry, wet or dry wiping) for respective surfaces and objects
- Frequency of cleaning (daily, weekly)
- Time of cleaning (mornings, evenings, at night)
- Checking cleaning work

Normally, service specifications are set out for each room, to record the specific circumstances of different rooms.

Sometimes other tasks may become necessary that fall outside the regular rota, e.g. wiping window handles. In this case the cleaning staff must be able to read any possible instructions.



Cleaning staff need to document the work they carry out in specific checklists and forms. The following points are usually required:

- Inventory (e.g. sink with fittings and mirror)
- Services (e.g. wet cleaning then wipe dry)
- Comments
- Transmission of information/request coming from the customer

The cleaning staff confirm the work has been carried out with their signature and the date. At agreed-upon regular intervals (e.g. monthly) the customer will add their signature to confirm the validity of the entries.

Further documentation is required from cleaning staff when tasks are carried out that are not detailed in the service specifications, e.g. coffee stains on carpets, permanent marker on whiteboards. Depending on the time and effort involved, the cleaning staff need to check with their superior whether, how and when the additional tasks are to be carried out and if any extra costs are charged. The cleaning staff may take photos to help decisions and to document the extra work. The additional services are described on the checklist:

- Nature of the problem (coffee stains on carpet)
- Cleaning method (treat stain with stain remover, rinse with water, pat dry)
- Result (stain completely removed)

Certified quality assurance also entails keeping a written record of any damages. Even though there are predesigned forms to fill in, the damage, cause of damage and events need to be briefly described and signed and dated by both the cleaning staff and the customer.

Companies who offer certified quality assurance need to ensure that their staff work professionally, not only in reliably and efficiently carrying out their cleaning duties but also in filling out all the necessary paperwork. **Sufficient literacy is thus an important factor in quality assurance.**

# Chapter Two: Provider Competence

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## Professionalisation of training providers

Basic education offers for low-skilled employees significantly differ in their planning and structure from general training courses. This results in specific requirements for the staff involved in the training.

Real-life job specifications need to be incorporated into any (further) training, and different areas of competence need to be taught, learned and applied.

It is also highly likely that many of the training providers (especially in the area of basic education), their project managers and training staff, do not have a great deal of experience in working with businesses, specific expertise in providing basic education for adults or carrying out basic education courses at the workplace.

In order to successfully teach basic competencies for the workplace, the teaching content needs to be specifically adapted to the company's requirements and the needs of its employees:

- Learning goals and contents need to relate to everyday work situations (contextualisation),
- The transfer of acquired knowledge back to the workplace needs to be ensured (i.e. the teaching content needs to be applicable to the workplace) and
- Optimal consultation and training needs to be ensured throughout. (The consultancy service is as important as the actual provision of training.)

Providing training courses of this kind requires providers to have staff with a wide range of competencies and new qualifications.

The education provider becomes a business service provider (an “expert in workplace literacy” within professional/vocational training) and therefore needs staff:

- with the relevant consultancy skills,
- with knowledge of vocational training as well as knowledge of the business sectors,
- with a high level of competence in the skills and methodology of adult education, specifically basic education.

## Functions and competencies of staff

The following descriptions refer to functions rather than job descriptions, as it depends on the size and/or personnel structure of a training provider organisation as to whether each function is carried out by a different person, or several functions are taken over by one person.

This function repartition also depends on the type and size of training project the provider aims at implementing.

Experience shows – we would like to refer specifically to the expertise of the Swiss Federation for Adult Learning (SVEB) and its project GO (Promoting Basic Competencies in Adults) – that 3 functions are necessary for the successful implementation of a basic education project in a business:

- **Project manager** is the main point of contact in the company, is involved in planning, coordinating and directing the project, and is responsible for further activities such as PR “sensitisation” and information.
- **Needs analyst** holds assessment interviews with the client company and individual assessments of employees, analyses the workplace, creates a job description, allocates relevant teaching content.
- **Trainer** is involved in the planning of teaching content, carries out training and develops suitable, work-related teaching materials.

Compared to “traditional” educational providers, all the staff involved in the training process need to have the following further competencies and qualifications:

- They act as business service providers and cater to a company’s requirements.
- They gain knowledge on business sectors, specific areas of training and development.
- They are experts in adult education, specifically basic education.
- They have expertise in planning and teaching the different competencies of basic education (reading and writing, mathematics, digital competence and critical thinking/decision making).

## Project Manager

The project manager is expected to:

- understand business sector-specific language,
- recognise and understand the requirements,
- formulate these requirements in terms of the company, and
- use the available information to offer relevant solutions.



The project manager is in charge for the entire duration of the course, from the beginning through to the end, and

- arranges with the client which employees are to be involved in the training course, and in which function,
- checks that the target group, scope and the basic areas of competence of the training are clear, or possibly in need of further definition,

- negotiates an agreement with the client, documents results, and contacts the relevant people in the company,
- evaluates the financial aspects and negotiates them with the company,
- discusses with the client how the course will be publicised within the company,
- plans and coordinates the needs analysis and the planning and running of the course and provides the client with regular feedback, as well as a final report upon completion of the training, and
- plans the final documentation/evaluation of the course.

Within the framework of an educational provider's public relations strategy, the project manager is also involved in creating and delivering concepts for sensitisation and information workshops, or in advisory services for various groups (political and business stakeholders, managers, union representatives), and may also be responsible for publications.

### **Literacy analyst / needs analyst**

Is expected to:

- be knowledgeable in the respective field of work or specific branches,
- work with experts from the company to create job descriptions and workplace analysis,
- and create descriptions of basic competencies, which are necessary in carrying out the work in question.



The needs analyst works with the client to determine the basic education needs at the workplace and the needs of individual employees. The function further involves:

- observing the workplace and documenting the findings,
- defining the basic education competencies involved,
- evaluating the results with the company's requirements,
- scripting and planning interviews and written tests for employees for needs and skills assessments, and
- designing a course package in liaison with project management and trainers.

## Trainer

The trainer has high expectations to meet:

- to be flexible in terms of time and location (irregular/antisocial hours: early mornings, evenings, in-company courses and at the workplace),
- to be highly experienced in monitoring the learners, in order to identify their changing needs and to adapt to the agreed learning objectives,
- to possess expertise in adult education, specifically basic education,
- to be knowledgeable in the respective field of work (work scheduling, terminology, work processes, etc.),



- to be able to plan and deliver course units to teach the different competencies of basic education (reading and writing, mathematics, ability to situate oneself in space and time, digital competence and critical thinking/decision making),
- to be able to design suitable work-related teaching materials, and build educational material starting from the identified problem-situations, and
- to document the progress, needs and achievements of participants and provide individual support where needed.

The trainer is actively involved:

- in the definition of learning goals,
- in the development of a basic teaching framework (with explicit mention of workplace requirements), to reach the learning goals, and
- in the development of tests to document learning progress.

The trainer:

- plans and documents training units,
- delivers training units while observing suitable teaching strategies,
- develops individual learning schedules, and
- checks progress and ensures that individual learning goals are reached in terms of the necessary basic workplace competencies.

## Trainer professionalisation

The possibilities for trainers to further their skills and knowledge are rare, and are mostly of an introductory nature, aimed at trainers who want to deliver basic education and literacy courses to adults in the mother tongue, or to migrants. There are no courses on offer at all that instruct on teaching vocational or workplace-oriented basic education.

Thus, lacking a specific model for the further professionalisation of the trainer and in light of the other functions described above, the function of a trainer can be seen to coincide in places with the tasks of the course instructor and the needs analyst.

### **Training the trainer (Remarks on a curriculum)**

The challenges placed on a curricular training model for trainers who want to deliver courses in workplace literacy are to adapt teaching methods and content to the needs of the participants on the one hand, and on the other hand to suit the company's requirements. In the years 2007 – 2009, the Leonardo da Vinci project CELINE developed a total of six modules for trainers within the new economy, which define key competencies and skills that are necessary to integrate elements of basic education with vocational training.

The original curriculum of CELINE covers six teaching modules for a two-day training period (12 hours) and can be delivered as a distinct workshop or as part of a more complex, multi-topic training session in working with adults in the context of continuing education or further professionalisation. The six modules are:

1. Literacy, lives and learning in the New Economy context
2. Literacy in working life & workplace; mapping workplace literacy
3. Learner-entered approach of embedded literacy teaching
4. Teaching content embedded literacy
5. Using ICT to embed literacy in vocational activities
6. Reflective practice

Modules 2, 4 and 5 in particular are decisive as they depict the process of development and implementation of workplace-oriented further education and training:



## MODULE 2:

### Literacy in working life & workplace; mapping workplace literacy

The instrumental aim of this module is to guide trainees in identifying, explaining, mapping and reinterpreting work-embedded reading and writing. At the end of the module, the trainees, VET teachers and VET professionals, will be able:

- To identify literacy behaviours/components in every day work;
- To identify key-texts in a given occupation;
- To explain different functions and roles connected to the different texts;
- To map embedded literacy skills in work requirements, e.g. in occupational standards;
- To reinterpret occupational competencies in terms of literacy skills



#### **MODULE 4:**

##### **Teaching content embedded literacy**

The main aim is to develop practical ways to embed literacy skills in regular vocational instruction. At the end of the module, the trainees, VET teachers and VET professionals, will be able:

- To design literacy learning objectives emerging from and suitable to the given job-specific content of the instruction;
- To describe strategies of embedding literacy education in another type of content (vocational, in this case);
- To identify the available opportunities for embedding literacy activities in the vocational content;
- To explain the impact, the influences of literacy competencies on the professional performance;
- To reinterpret vocational instruction accordingly with the new, revolving dimension brought by the insertion of the literacy education in it;
- To plan the content-embedded literacy competencies that should be attained.



## MODULE 5:

### Using ICT to embed literacy in vocational activities

The main objective of this module is to provide methods and strategies for solving every day work problems related to reading and writing in general and especially for the people who experience reading and writing challenges and barriers due to low literacy skills. This objective is reached by the following learning outcomes:

- Making trainers aware that enhancing basic computer skills may, at the same time, be a way of enhancing reading and writing skills.
- Increasing knowledge of different kinds of electronic tools.
- Raising awareness about the fact that certain adults who are very good workers may need ICT tools to compensate for their low literacy skills, in order to do their jobs more efficiently.

# Chapter Three: Funding

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## Situation in Germany

Literacy and basic education (for adults) are at the core of adult education in Germany, and therefore fall under the responsibility of the individual states and communities. The same applies to the funding.

Basic education offers for company employees can be funded through the “Bildungsprämie” programme in theory, but in practice there are considerable difficulties as this funding only covers a few single instances and thus is not useful in most situations.

Conditions of eligibility for this funding include:

- The applicant must be aged over 25,
- The course may not cost more than 1,000 euros,
- The applicant needs to be employed, full or part-time (at least 15 hours per week) and
- The applicant’s gross yearly salary may not exceed 20,000 euros (or a combined annual salary of 40,000 euros per year for married couples).

Literacy courses (with integrated German as a second language) for migrants are funded through the Federal Office for Migration and Refugees (BAMF). Basic education courses for employed migrants are not supported by this programme.

General literacy and basic education courses (sometimes vocational and/or in cooperation with companies = local or regional model projects) are offered by community adult education centres (in all federal states and in most cities). The adult education centres are funded by the communities.

From 2015 it will be possible to finance vocational basic education through European Social Fund (ESF) grants. The relevant rules and conditions are being drawn up by the federal states. It is still uncertain whether basic education courses for companies will be funded.

The national government, the federal states and other partners have developed a national strategy for adult literacy and basic education for 2012 – 2016. Within the scope of this initiative, the Federal Ministry of Education and Research will support short-term model projects, which will also include basic education for company employees (see Examples of Funding for Training).

## Situation in Austria

Literacy and basic education (for adults) is seen in Austria (like in Germany) as a (core) part of adult education – however we have no right to (further) training, as in some other European countries.

For some years now, the “official” Austria also sees basic education as an aspect of adult learning that has to be funded. In 2008 the government programme[1] defined the Life Long Learning strategy as one of the tasks of adult education: “Life Long Learning is a chance for the development of personality, of society and of economy. Adequate offers for acquisition of basic education are an essential prerequisite, especially for people with a migration background.”

Based on that program, the Initiative for Adult Education (IEB) has been formed with representatives from the Ministry of Education and the nine Austrian provinces, as well as adult education experts. The achievement was an official agreement[2] between the Ministry and the nine Austrian provinces regarding the financing of basic education as well as a document describing the project’s intentions, the quality standards and the main structure and procedures throughout [3].

The initiative for adult education now covers two program areas: the training of basic skills and lower secondary education. The target group of the program area concerning basic skills consists of people who never had the opportunity to gain such skills, irrespective of language, social and academic backgrounds. The main quality guidelines of this program area refer to the individualisation of the courses and the adaption to the needs of adults. One of the most important merits of the initiative of adult education in this context has been the development of a framework directive for the adult’s basic skills training, which is the first one of an official sort in Austria. [4]

For years afterwards, the EU primarily financed literacy and basic education courses aimed at learners free of charge (especially in the context of the European Social Fund, but also the European Integration Fund - often with a focus on language training for specific target groups), national or community funding programmes, but also by Austrian job-centre (AMS) subsidies, a new financing structure was finally funded to offer everyone from the target group, free of charge.

Now it must be proven whether it is possible to make an accreditation for workplace literacy programs within this process.

If Austrian institutions want to take part in the IEB, they have to apply for an accreditation in the initiative for adult education and provide evidence on the following 3 quality criteria [5]:

- Fulfil general requirements for an educational establishment
- An appropriate concept of the program
- The qualification of their trainers and counsellors has to reach the guidelines of the initiative for adult education

Other possibilities for workplace training course subsidies for companies/providers can be [6]:

- Qualifying funding of Austrian Job Centres (AMS): often related to achieving a (formal) qualification or for a specific sector/branch/vocation [7]
- Projects within the new ESF funding period [8]

Individual funding is granted by:

- Austrian job centres – Related to job searching [9]
- Regional governments – differ in the nine Austrian counties [10]
- Chambers of work, Chambers of Commerce for courses in educational institutions

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[1] Government program of 24th legislation period, 2008 p. 200 f.

[2] The agreement was finally signed at the end of 2011. Operations started at the beginning of 2012 and will be secured until the end of 2014. Further negotiations about the future of the initiative will be taken up then.

[3] Its objective is to enable adults who lack basic skills or never graduated from a lower secondary school to continue and finish their education. The innovative approach of this project (IEB) is due to two factors. First of all, the implementation of consistent quality guidelines for courses of this program in all parts of Austria and, secondly, the fact that all courses are free of charge. See details in: Programme planning document, latest version, only available in German 09/2011:  
[www.initiative-erwachsenenbildung.at/fileadmin/docs/PPD%202011\\_09\\_15\\_Letzfassung.pdf](http://www.initiative-erwachsenenbildung.at/fileadmin/docs/PPD%202011_09_15_Letzfassung.pdf) p.5

[4] [www.initiative-erwachsenenbildung.at/fileadmin/docs/Initiative\\_for\\_Adult\\_Education.pdf](http://www.initiative-erwachsenenbildung.at/fileadmin/docs/Initiative_for_Adult_Education.pdf) p.2

[5] Criteria for accreditation: (German) [www.initiative-erwachsenenbildung.at/akkreditierung/](http://www.initiative-erwachsenenbildung.at/akkreditierung/)

English short version of all information:

[www.initiative-erwachsenenbildung.at/fileadmin/docs/Initiative\\_for\\_Adult\\_Education.pdf](http://www.initiative-erwachsenenbildung.at/fileadmin/docs/Initiative_for_Adult_Education.pdf)

For the full process please have a look on the Initiative of Adult Education website: <https://www.initiative-erwachsenenbildung.at>

[6] "Can be" means that budgets, quality criteria, strategies, target groups and objectives often change, as in every European country.

[7] In German only: <http://www.ams.at/service-unternehmen/foerderungen>

[8] Involved in this process are: Federal Ministry of Education and Research (BMBWF) and Federal Ministry of Labour, Social Affairs and Consumer Protection (BMASK), website with information on the process, objectives and funding on ESF 2014-2020 (only in German): <http://www.esf.at/esf/start-2/esf-2014-2020/>

[9] Website in German: <http://www.ams.at/service-arbeitsuchende/finanzielles/foerderungen>

[10] A good overview (in German) on financing of further education for individuals:  
[www.initiative-erwachsenenbildung.at/service/foerderungen/personenfoerderungen/personenfoerderungen.php](http://www.initiative-erwachsenenbildung.at/service/foerderungen/personenfoerderungen/personenfoerderungen.php)

## Situation in France

In France, core skills training programs designed for employees fall within the context of the Right to Training.

On-going vocational training has in fact been written into the law since 1971 [11]. This law obliges employers every year to finance vocational training by allocating a certain percentage of the payroll.

Since 1971, several inter-professional negotiations and laws have advanced the rate of company contributions (which vary according to the size of the company).

The law of 2 May 2004 introduced actions into the Labour Code with the aim of resolving illiteracy and increasing French language learning so that these feature primarily among the types of training courses in the area of on-going vocational training.

Following on from this law, several negotiations took place within the various business sectors.

To give an example, social partners from the cleaning industry decided to employ an innovative scheme that they had implemented several years beforehand: the "Master professional writing" scheme, which was introduced at the beginning of the 2000s. These training courses evolved into the "Master the core skills of the Cleaning Industry" (MCCP) scheme.

Every employee signed up to the course benefits from 250 hours of paid training within their work schedule [12]. The training patterns are often comprised of two weekly sessions of 3 hours at the end of the morning or at the beginning of the afternoon (so as not to disrupt the workplace organisation, which typically takes place early in the morning or in the evening). The MCCP training courses now produce continuous evaluation of the core skills acquired within the framework of these training pathways.

Since 2002, more than 8,000 employees from this sector have benefited from these training programs.

Even if access to training is a life-long right, it still remains unequal. The socio-professional category is, undeniably, a deciding factor. In 2010, sector-wide, "one in every six workers confirms having taken part in a training program in the last twelve months in contrast to the one in every three executives or technicians" [13]. Moreover, up until now training programs offered to employees focused mainly on the acquisition of technical skills or were mandatory in nature (for example: permits for operating secure machinery, electrical qualifications, etc.).

Because of the rallying of a significant number of agents (ANLCI [14], OPCA [15] and FPSPP [16], for example), there currently exists a distinct awareness of the issues related to the command of core skills at work and a significant development of training courses organised within many companies and professional sectors.

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[11] Law 71-575 of 16 July 1971, focusing on the organisation of on-going vocational training within the framework of lifelong learning. See [www.legifrance.gouv.fr](http://www.legifrance.gouv.fr)

[12] A part-time employee will therefore get an amendment to their working contract, guaranteeing remuneration for the training hours they have undertaken; meanwhile a full-time employee will be substituted on-site in order to be able to partake in the training sessions

[13] INSEE (National Institute of Statistics and Economics Studies), briefing document 'Lifelong Training'. See: [www.insee.fr](http://www.insee.fr)

[14] ANCLI, National Literacy Agency, created in 2000, is a Public Interest Group (GIP) whose role is to develop prevention and propose solutions to illiteracy in all areas of French society. See: [www.anlci.gouv.fr](http://www.anlci.gouv.fr)

[15] OPCA, Approved Collecting Fund Bodies responsible for the pooling of contributions collected from companies.

[16] FPSPP, Joint Training Funds Agency, which, since its inception in 2009, has mobilised financial provisions for the development of actions aimed at tackling illiteracy to benefit the employee. See: [www.fpspp.org](http://www.fpspp.org)

## Examples of funding for training in Germany

### **National Level (Federal Ministry of Education and Research - BMBF)**

Remark: In the German Federal System the Federal Ministry of Education and Research is not allowed to finance long-term measures in the field of adult education. Only initiatives or model projects can be funded.

The BMBF has been committed to literacy within its remit for decades. As early as 2006, the BMBF readjusted its funding and pooled "Research and development of literacy and basic education of adults" in one funding priority. There are 24 collaborative projects with over 100 research and development projects, receiving funding of about 35 million euros (2007 - 2012). The projects listed in the National Strategy build on this fundamental knowledge gained when shaping the literacy work with adults.

The new "Workplace-oriented literacy and basic education of adults" funding programme has a budget of about 20 million euros provided by the Federal Ministry of Education and Research. The project period is until 2015.

The funding priority is split into three parts:

- Concepts and measures for workplace-oriented literacy and basic education,
- Counselling and training for those active in the working world and in the daily life of those concerned, and
- Continuing training programmes for trainers and lecturers in education programmes.

Other BMBF initiatives and projects:

- The "ich-will-lernen.de" learning portal: The German Adult Education Association (DVV) developed this e-learning portal with BMBF funding. The learning portal provides online exercises for literacy and basic education free of charge. Learners can use the portal anonymously if they wish as additional learning support for contact courses in higher education institutions. More than 290,000 learners have already registered with the portal, with about 15,000 users who are active five days a week. The "Writing" learning programme has addressed functional illiteracy since 2004 and has become deeply entrenched in literacy work. It has been expanded to include modules preparing for a school-leaving qualification in adult life. A module for basic education in economics is currently being developed.
- The DVV educates the trainers from higher education institutions free of charge on how to use the learning portal. Further information is available on the Internet sites of the Second Chance Online project portal and the learning portal.

- "ALFA-Mobil" project (Bundesverband Alphabetisierung und Grundbildung e.V.): The ALFA-Mobil is a specially equipped vehicle providing information and counselling locally. It targets those regions where few if any literacy programmes have been set up and supports the establishment of learning programmes.
- Funding is also provided for conferences (Bundesverband Alphabetisierung und Grundbildung e.V.) as milestones in the national implementation of the UN Literacy Decade. This occurred in 2003 in Bernburg, in 2004 in Berlin, in 2005 in Frankfurt, in 2006 in Bonn, in 2007 in Hamburg, and in 2008 in Leipzig.

### **Regional Level (exemplary activities)**

One of these successful regional financing models for basic education, sensitisation of the public and PR, is the Alliance for Literacy and Basic Education in Trier (Rheinland-Pfalz), under the patronage of the mayor of the city of Trier. With around 80 members from civil society, administration and politics, the Trier Alliance is the largest alpha-alliance in the country. The variety of partners in this alliance mirrors the diversity of funding sources, including funds from federal ministries (regional learning programmes), funds from the state of Rheinland-Pfalz and the city of Trier, as well as ESF funds.

In Berlin the Senate Administration for Education, Youth and Science plans priorities of the ESF funding period 2014-2020. From 2015 the target groups of literacy and basic education will benefit from an ESF funding in terms of courses. It is still unclear to what extent workplace literacy will play a role. Another funding priority will be training seminars for the trainers.

On a regional/local level, currently only the Volkshochschulen (Municipal Adult Education Centres) are providing general offers of literacy courses.

## Examples of funding for training in France

### **Example of a literacy programme implemented on the initiative of a professional branch**

In France, over the past few years, more and more professional sectors are starting to get involved in literacy training programmes. One of the oldest existing programmes is one dedicated to training Cleaning-sector employees.

In the late nineties, the then newly-established cleaning sector started to implement research on literacy issues among the staff. Employing a lot of foreigners, they had indeed noticed the difficulties of communication related to language, but the research and the observations they made also lead them to notice the lack in reading and writing skills. A training programme called “Mastering Professional Writing” [17] was created through:

- the establishment of a network of approved training providers ready to commit to new audiences (i.e. employees, while also training themselves to identify the concerns specifically linked to intervening within companies)
- the commitment of this network to mutualise good practises and educational material
- the design of a training programme adapted to workplace reality
- the advantageous funding offering the employees the possibility to complete these courses entirely on work time (i.e. paid the same wage as during work).

This training programme, which was initially mostly centred on reading and writing skills, evolved and began integrating more and more objectives and knowledge (calculation, orientation, understanding and speaking, etc.) In 2011, it became “Mastering key-competencies in Cleaning” [18] and was improved thanks to a specific evaluation device adapted to the contents of the programme.

This programme is funded by the Cleaning sector’s OPCA[19], OPCALIA Propreté. The funding has two aspects:

- buying the training course from the training provider (15€ per trained employee/per hour),
- reimbursing the trained employees’ wages to the companies for the training-course hours (in total, the programme’s duration is 250 hours).

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[17] In French : “Maitrise des écrits professionnels.”

[18] In French : “Maitrise des Compétences-clés de la Propreté”.

[19] OPCA, Approved Collecting Fund Bodies responsible for the pooling of contributions collected from companies.



**PART TWO**

**TAKE ACTION!**

## INTRODUCTION (41)

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# INTRODUCTION

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Employers tend not to see a lack of basic skills among their employees as an immediate challenge, which is something that should be addressed. Instead, they address the business issues arising from their operating environment. These issues, which include low productivity, poor safety records and high error rates, may mask underlying basic skills challenges. However, basic skills challenges are often not identified specifically until employers have to begin grappling with possible solutions and their implementation in order to address the various business issues. Once basic skills gaps have been identified and training has been developed and implemented, businesses often notice soft returns as well as hard business results. For a good intervention and implementation of basic skills training in companies it is fundamental that the benefits and success for everyone involved is clear to see.

If a training provider plans to offer basic skills training to companies, it must be prepared to deal with a sensitive issue, as the training provider must be very well prepared to win companies over. In order to arouse company interest regarding this issue, training providers must have detailed subject knowledge, sufficient knowledge in order to predefine the target audience, possible learning content and objectives. How companies should be contacted and how these basic skills training sessions should be advertised must also be thoroughly considered.

Once a decision has been made to consider the option of basic skills training in more depth, there are some general steps to follow. How to go about doing this will depend on the size of a specific workplace, available resources and support networks, as well as the organisation's mandate. Necessary in achieving this is very good planning and coordination with all involved, including the employer and employees, or the manager and the workers, because basic education training offers to lower-skilled employees sessions possess a different plan and structure from general ones.

## **Methodology**

The workplace is a complex location for training since the learning of values, tasks and conduct is imperative for the employees and forms the basis of their performance. Learning and training are advantageous as they are factors in gaining the company more business and at the same time for the workers' professional and personal growth.

Situations requiring basic skills training intervention usually have to do with the performance of a duty or task. Developing a training programme involves assessing the needs, designing materials, developing training presentations and exercises, implementing the program and evaluating the success of the program.

## **Processes**

There are two key agents: the company and the training provider. The company takes on multiple functions. First of all, it has the role of promoting the training activity. Furthermore, it decides which workers will take part in the training and identifies the objectives and goals – for the company context in particular – that will be included in the training activities. In addition, it is also up to the company to take up measures such as shift models that make it possible for workers to take part in activities.

## **Intervention approach**

The following steps give an overview of the intervention approach:

- (1) Contact is made with the company and the contract is awarded (includes organisation and strategies of marketing, first contact with the company, determining initial company data, project takeover).
- (2) Workplace literacy needs analysis (includes organisation and strategies based on typical professional activities in job situations, comparing those situations within the company context, analysis of the situations and determining important competencies/skills (personal, social, literary, etc.), editing the requirements (job profiles) regarding professional activities and the workplace, and using the assessment procedure)
- (3) Implementation of the training program (includes the steps from a job profile leading to a training program, factors of success for the training program and the evaluation)
- (4) Transfer (includes strategies aimed at winning over the management and conception and devising activities that allow the learners to integrate the skills they acquired during training)

The process and activities involved are explained in the chapters that follow.



## Chapter One

The fundamentals for a  
successful training intervention

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Before entering into the various steps of the definitive implementation of a literacy training programme, this chapter will explain the fundamentals that underpin the Literacy@Work approach.

## Adults at work: The provider's attitude

The training courses are specially designed for adult learners. It must therefore be kept in mind that each of the learners has a path; a personal, social and professional life that enables them to acquire knowledge, experience and know-how. They have also developed strategies to face difficulties linked to basic skills at work and in everyday life.

The group that the teaching team is going to work with is composed of workers or employees who have been working in their given professional sector, in some cases for a long time, and do not need to be taught their job. The workplace literacy trainer is a literacy trainer and not a "job trainer". Moreover, the know-how and strategies developed by people throughout their personal and professional pathways can be a support for them to learn new things. They are skilled professionals in their trade while the teaching teams have no knowledge that work. Meanwhile however, the learners have difficulty with basic skills, which is the teaching team's area of expertise.

The work situation is the one common factor in both the learners' training and their actual area of expertise. Hence it is a starting point for analysing the needs and building the contents of the training programme.

As training providers and as teaching teams, you must take these aspects into account through every single stage of the project, from the very first contact with the company to the final evaluation of the training programme.

## Effective training courses that are solutions-oriented...

The training is founded upon work situations. In other words, the trainer firstly needs to understand the problem-situations people face in their work, i.e. situations that arise from having difficulty with basic skills. Training does not consist, therefore, in teaching language, numeracy, or even spatial and temporal orientation per se, but always within a specific context.



Training is founded upon work situations and must therefore meet specific needs and resolve problem-situations.

**EXAMPLE:**

*Electricity supply workers, who are tasked with burying an overhead power supply network and build underground structures, have to be able to read very precise plans of the existing power network. Indeed, to bury the electricity lines, you have to dig into the ground and therefore know very precisely if there are already other power lines under the ground (such as water pipes, gas connections, etc.). You can find out where the existing power network is thanks to a precise map that is given to the workers during the realisation of the work. Despite excellent practical work (due to experience and habit), these workers may miss the comprehension of the notion of scale that enables them to understand such a map. Thus, they may make the error of digging in the wrong place because they misread the plan, causing for instance a hole in water or gas pipes that can sometimes lead to leaks and severe accidents.*

**...but not aimed at a strict adaptation to the workstation**

As a training provider, you shall set up effective, solutions-oriented training. However the approach should not be strictly utilitarian. Training is therefore centred on work situations in order to both fix the problem-situations people face in their jobs and to act as a lever for acquiring basic skills. Indeed it is easier for people to learn and make progress when they are in familiar situations, when they are presented with examples from real life and also with measurable and realistic objectives. But the newly-acquired skills, which can be observed and measured in a specific situation, ought to be transferable to other situations.

**EXAMPLE:**

*In order to plan the tasks they have to carry out in a given time slot, cleaners must be able to calculate how much time they need to perform them. The training course will enable them to transfer the reasoning skills developed in order to calculate their working times, which in turn will enable them to calculate other duration times both at home and at work (journeys, distances, appointments, children's activities etc.).*

## A focus on the audience and on learning issues

The majority of companies underestimate the importance of basic skills. If you plan a program for basic education in a company, you have to know that you'll be constantly confronted with questions concerning the target group.

First of all, it is frequently assumed the group is solely comprised of immigrants and migrants, with language problems. Language problems are often confused with basic-skill deficits. But the main concern is regarding the employees who possess some literacy skills but are still below the accepted standards of proficiency in the modern workplace or modern world.

The fact is, the needs of those who lack basic skills are not visible at first glance. This is due to several reasons, firstly because many believe that for unskilled jobs, no literacy skills are needed. The second reason is that in teams with clarified responsibilities and collegial assistance the lack of literacy skills are compensated. To know the request and tasks in the workplace and to highlight situations with basic-skills requirements is even more important. Good opportunities to do this are pinpointing the common workplace issues and challenges where basic skills play a role:

- Incomplete paperwork and challenges using workplace documents
- High error or waste rates
- Opportunities to improve customer service
- Resistance to change in procedures
- Increasing health and safety incidents and violations
- Implementing changes are slow and hard
- High staff turnover
- Unpredictable downtime
- Changes to staff performance
- Continuous breakdown of machinery and equipment
- Increasing need for teamwork, leadership and communication

## An intervention made of variable processes

A well-conducted training programme designed for workers and employees must be carried out from beginning to end with necessary insight and a comprehensive vision. Indeed, architects of traditional training programmes recommend well-defined steps to be followed in a particular order.

Literacy@Work methodology, on the other hand, strongly recommends precisely identifying the “must-haves” in the training programme, keeping in mind that the various steps will not necessarily be followed in the same order or the same way.

- Therefore, the basic steps are:
- Contact with the company, which can be made in various ways (see Chapter 2)
- Analysis of the company’s expectations
- Creation of a job profile including basic skills
- Analysis of the employees’ expectations and needs
- Implementation of the training programme and the training activities
- Evaluation of the training

Once these key factors are identified, the intervention will be composed of different processes. As the intervening team, you must go back and forth in order to be in a position to analyse the expectations and needs throughout the course of the training. You can neither predefine nor “chop up” the content.

Therefore, you are not going to present the company with a training catalogue containing preconceived “Key Skills” programmes, as the content and the intervention methods are defined by the analysis processes and the observations put in place.

### **EXAMPLE:**

*A training provider X. establishes contact with a logistics base. The company expresses the following request: The workers will be increasingly required to use digital tools to carry out their working tasks. The training programme must enable them to gain autonomy in this field.*

The training programme begins. The trainer designs learning sessions based on situations that workers are facing at work. He/she gives a clear description of the approach, i.e. in this case regarding the use of digital tools at work. In communicating with the workers, the trainer finds out that mastering the use of the digital tool is just a small part of the issue as learners also experience difficulty with understanding some of the written instructions, which are essentially there to explain which data they are supposed to enter into the computer software.

The trainer is now able to redirect the content of the programme and discuss again with the company the newly identified needs. This can equally have an impact on the number of hours dedicated to the training programme, or even on the decision to implement a second training programme for those in difficulty.

## Literacy@Work's intentions

To sum up the ideas developed in this chapter and to raise the question of learning outcomes, here is a list of the essential principles, which are key to the implementation of rich and effective training programmes:

- No production of skills without implementation in the work situation.
- No acquisition of skills without positioning learners as agents of their learning process.
- No production of new skills without transformation of work organisation by integrating these new skills.
- No transformation of work organisation without participation of management.

To corroborate these principles, the training provider must design relevant training engineering:

- Training should be consistent with the expectations of the companies concerned.
- The educational progress should be articulated using the professional situations of the workers.
- The information gathered from each job position will allow us to define appropriate learning sequences.
- Training achievements must be readily transferable in the workplace.



## Chapter Two

From the analysis of  
expectations to the analysis of needs

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The solicitation of a company to the implementation of a basic education training program in a company is a multi-layered and complex process.

**Firstly:**

To offer basic education training programmes in companies, marketing is required; identifying the target market, deciding the key messages and choosing communication channels.

**Secondly:**

Meeting with potential clients means building relationships with them, preparing for the objections and concerns of companies and written proposals or examples for basic skills training (including workplace analysis, assessments, training programme realisation, evaluation and transfer costs).

**Thirdly:**

If the contract is signed, it must specify the objectives and the needs of the company. This is an extensive procedure. In meetings and discussion with managers, department managers, foremen and workers, basic-skill needs, goals and objectives are specified. A workplace analysis indicates the requirements.

Then the development of a **needs-based-trainings program** can begin.

## Making initial contact with the company

Depending on context, there are several ways to establish contact with companies. It all depends on the level of awareness of the latter concerning the issues related to their workers' core skills.



For more information on company and agent awareness, see part 1.

Below, a non-exhaustive inventory of the possible ways to establish contact with companies is provided.

## Seek new clients

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As a training provider whose training is mainly aimed at migrants and people involved in an inclusion process (job seekers, young people, etc.), you may wish to diversify your training course offer in the hope of reaching new targets. However, you may not always have the necessary network to find companies who may be interested in your new training offer, meaning you'll have to solicit companies in order to make yourself known.

### **CASE N°1: DEVELOP A MARKETING STRATEGY**

#### **Define a target market**

Defining a target market will help you to take an efficient, manageable approach to developing your service in order to:

- Develop a point of difference as a provider.
- Develop expertise in a particular set of industry and company issues.
- Avoid overextending yourself at the outset.

Your target market is the set of industries and companies that you want to purchase your services. You select them based on:

- Whether they are likely to purchase workplace literacy programmes.
- How feasible it will be for you to deliver the types of programmes they want or need.

#### **Decide your key messages**

Your marketing messages tell companies how they can benefit from your workplace literacy programmes.

The needs of the target market will inform your key messages. Here are some pointers:

- Effective messages are short, clear and to the point. They address the issues that companies are facing.
- Tell your target market how they will benefit from purchasing your workplace literacy programme. Managers want to know what they'll get, not how you'll do it! Managers invest based on the costs and benefits for their business. They are not interested in an educational rationale.

- A tailored message tells potential clients that you understand their needs – consider focusing on a particular set of company issues and conditions (e.g. health and safety, quality, customer service, etc.).
- You may want to note that regional, national (if they exist) or European subsidies for approved programmes can significantly reduce the employer’s costs.
- Use your past success to encourage confidence in your service.
- Be consistent in how you describe what you are offering. Be careful what you promise, don’t promise more than you can deliver.

### **Follow-up and record keeping**

- The way you follow up on the contacts you make will determine the success of your marketing efforts.
- Companies may take some time to decide if literacy is an issue for them, and whether they want to address it. Keep in touch and offer helpful information about how they can identify and address literacy issues. This can mean they will contact you when they are ready to purchase a programme.
- Documenting your marketing activities and contacts enables you to tailor follow-up activities and to progress the relationship. Keep records of who you have contacted, the information they have received and what you have discussed. Include them in periodic mail-outs and phone contacts.
- If you proceed with a programme for a company, the information collected during marketing becomes the starting point for your client records.
- If you do not proceed to a programme with this client, the data you keep can be useful in reviewing and improving your marketing and sales approach.

### **Meeting with potential clients**

At this point you’ve made telephone contact and set up a face-to-face meeting. You’ve already shown that you are interested, available and ready to help. You are now able to build on this in order to:

- Find out as much as you can about the company (and decide if this is a company you want to work with).
- Show the potential client how you can meet their needs.

## **CASE N°2: USE AN EXISTING CONTACT**

In the field of core skills, traditional methods of soliciting new clients (i.e. e-mailing and telephoning aimed at gaining a large quantity of clients) are not always sufficient. Indeed, this issue needs to be talked about during a meeting, in order to take time to explain the approach in a qualitative way.

### **EXAMPLE:**

*A training provider works with young people involved in inclusion programmes. The young people go on work placements as part of their training. The trainer gets to meet people working in the company (managers, supervisors) and can have an informal discussion about employees' needs.*

*This exchange may enable the trainer to identify the key actors of the company, and to organise for instance a meeting to sensitise them on the key-skills issue. This meeting could subsequently lead to the set-up of a training course.*

## The company contacts you

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In this scenario, the training provider has already trained workers and the company has heard about the work carried out. They then establish direct contact with the training provider with a reasonably specific request.



A company can have specific issues to solve in terms of quality, traceability and following new procedures, for instance, when they realise that their employees find themselves in difficulty accomplishing these specific new tasks. They therefore call for help, asking a training provider for support.

**EXAMPLE:**

*In France, a company in the building sector points out that some workers fail the CACES (a license enabling employees to operate certain machinery such as platform trucks or forklift trucks). They note that workers do not lack technical skills but that they do not fully master writing and reasoning skills in order to succeed.*

The company therefore gets in touch with a specialist organisation to introduce training. The objective is precise: the training course should help workers to pass their test more easily.

**Other organisations contact you**

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**PROFESSIONAL SECTORS**

As regards professional sectors, new needs may arise, often related to the development of the notions of quality, traceability and the growth of the role played by new technologies. Requirements have therefore become more demanding, which has its consequences on employees. It must be noted that employees need to be trained in order to acquire these new skills.

**EXAMPLE:**

*In the agri-food industry, companies are to comply with security and hygiene standards. In France, since 2007, the sector has pointed out that in order to comply with those standards, employees will need training to improve their reading and understand regulations skills.*

*With the support of a consulting firm (Récif), OPCALIM, the agri-food Recognized Collecting Fund Body has set up a training programme called "MSF" [1] (Mastering the Core Skills). They organised and approved network of basic skills training providers that could intervene in this field.*

*OPCALIM's job, with the support of Récif is to sensitise the agri-food companies to literacy issues and once they get a request from a company, to organise the implementation of the programme with the selected training provider.*

*The training-course duration is 70 hours, and can be renewed if necessary.*

## **CONSULTING FIRMS**

Consulting firms may be requested by a professional-sector organisation or by vocational training funders to set up core skills training packages. Those consulting companies go on to design the training engineering – they identify a network of competent training providers and determine the specifications with which the training providers have to comply.

On the training provider side of the operation, they must be alert to answer any call for projects on core skills vocational training.

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[1] In French, "*Maitrise des Savoirs Fondamentaux*".

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## **GENERAL ADVICE**

As a training provider you should identify the organisations that can be involved in workplace literacy projects by funding, sensitising companies about the latter and developing a political purpose about the literacy needs in professional sectors. You should identify them, be in touch and include them in your network.

Here are some examples of these organisations:

- Trade or professional associations
  - Chamber of Commerce
  - Industrial Association
  - Chamber of Labour
  - Trade Unions
-

## Gathering companies' expectations and making them explicit

When a company asks for a training programme for some of their employees relating to literacy at work, very often they formulate their requests from perceived difficulties.

The company waits for a rapid consideration of its request, with an attentive ear and an understanding of the context and the concerns. The company also wants to check that the training provider is able to respond adequately to its request.

However, the companies' requests are more or less explicit and formalised. Therefore, at first we will have to reassure the company of our ability to answer in a relevant and quick way, but also to analyse it such as it is expressed. Behind the first request can sometimes appear an implicit demand.

Often, it turns out that the expressed needs go beyond the key skills training, i.e. management issues, workplace organisation.

### **ADVICE:**

- During the first few meetings or telephone contact with the company, try to bring out the literacy problem-situations that initiated the training request and question the person you are meeting with about the objectives pursued by the company.
- Adopt an understanding and attentive attitude during the discussion, in order to be able to identify very precisely the context in which the company's request and specific concerns take hold. This approach and attitude will gradually enable you to propose an appropriate interventional approach, and clarify - even negotiate - the modalities of application of a relevant training programme.
- The project manager in charge of this request-analysis work, besides having expertise in the field of literacy at work, therefore has to have a good level of knowledge of the economic and social concerns in the business world/workplace (knowledge of the main actors within companies and professional sectors, knowledge of the funding logic, and current evolutions in the workplace) and gather qualities and skills allowing him/her to adopt a posture favouring the dialogue, the questioning, the argumentation and the negotiation.
- In short, our interlocutor must be able to sense quite quickly that you are paying attention to his/her request, that you are trying to handle it quickly, that you are adopting an attentive attitude and that you will intervene as real professionals (mastering your subject and acting with rigor and method).

Furthermore, it will be important to plan a meeting with the applicant by potentially including other staff members in order to introduce yourself more effectively, to get acquainted, to obtain additional elements of information and have the interlocutors specify their demand.

Considering this dialogical approach, which we recommend, it would be futile to suggest here an interview grid with a set of typical questions to ask your interlocutors.

However, let's note the elements that seem important to identify during the first discussion (these elements will possibly be completed by additional research at the end of this discussion or during a second meeting).

**Information to be gathered during the first meeting/conversations:**

- Who gets in touch? (Name, address and phone number, functions, etc.)
- Main information about the company (Name, address and phone number, professional sector, membership in a group, localisations, staff, etc.)
- How did your interlocutor obtain our address and phone number? (Mobilised networks, intermediaries' identification and address and phone number, etc.)
- What is the nature the demand? (Note that it such as was expressed initially)
- Who are the concerned people?
- What initiated this request?
  - o Noticed difficulties - ask if these difficulties were expressed by those involved,,
  - o Opportunities of funding,
  - o Reflexion led within the company,
  - o Company's management of jobs and skills politics
- Are the issues concerning the company and the staff eventually addressed by the training programme sought by the interlocutor?
- What other elements of the context are talked about?
- Has the interlocutor already expressed expectations and reasonably precise criteria on the formative answer he awaits from us (duration, rhythm, objectives, budgetary elements, eligibility in an existing plan, terms, etc.)?
- On the contrary, does the interlocutor wish to study with you which type of training would be suitable?
- Has she/he raised questions, obstacles, favourable factors?

- Has she/he required you to clarify certain aspects (e.g. functional illiteracy, illiteracy, German/French as a foreign language), has she/he asked about the reachable operational objectives?
- Does she/he require support from you on the information to develop within the company, on the location of the employees concerned, on the mobilisation of the management, on the mobilisation of key-staff and on the analysis of the problem-situations?
- Were there other elements expressed?

**Taking notes during this meeting is fundamental:**

- Note the vocabulary and the expressions used by the interlocutor,
- Note all the topics you discussed,
- Note the main information that was passed on during the meeting, and
- Note the first proposals made and the first points that were agree upon.

NB: More often, a good standard of listening and exchange allows the achievement of all the elements listed above.

It's never about obtaining this information by asking these questions successively in the form of an interrogation. It would be extremely unproductive and would quickly lead to a block or a rejection from the interlocutor.

At the end of this meeting (or at the end of the first few meetings), the request analysis work is initiated and can possibly continue - according to what was agreed with the interlocutor during a more formal additional meeting.

It must be noted that the commercial dimension and your negotiation capacity are very present from these first interactions: it is from this point that you can gradually propose an adapted intervention approach and negotiate the modalities of implementation of a relevant training programme.

In practical terms, the analysis of the expectations is carried out through meetings and discussions, which often take place over a long period of time. Indeed, a company may be interested and decide to meet a training provider but choose to postpone the training session.

It is sometimes advisable for the training provider to give the company time to think over and to re-evaluate their expectations before contacting them again.

The approach presented here is relevant because the company needs time and needs to recognise an active listener in order to be able to formulate its requests. Indeed, as said before, the explicit request sometimes hides implicit ones. Here is an example to illustrate this situation.

**EXAMPLE:**

*An industrial company contacts a training provider because some production operators are unable to fill in work documents. A Human Resources manager then meets with a project manager from a training provider. During the meeting, the project manager enquires about workplace organisation, the distribution of tasks, especially as regards writing: who reads and fills in the workplace documents? In what kind of situations do the employees have to read the documents and/or fill them in? How do those who are unable to do that cope with it?*

*As the HR manager offers insight it appears that certain line managers of the operators aren't filling out the forms either, even on some occasions asking the operators themselves to fill them instead. This has consequences on the organisation of work and the distribution of tasks.*

*The training provider is now in a position to help the company understand the difficulties and to organise places for new learners in the future training programme.*

## Sending a proposal and determining the training methods

Following this initial analysis of the request, you will send a proposal to the firm. This proposal explains the approach you want to adopt and includes organisational factors such as the length of the training, the pace, how the analysis of the training needs will be conducted, how the managers should be involved and so on.

### **The proposal**

The written proposal must mention several points:

- A short presentation on the background of the request
- The reformulated request
- The essential points of the approach that you wish to adopt (analysis of the employees' needs, a training programme based on work situations, content of the training programme, the results of the training and the bond with the company, etc.)
- The practical terms of the training, i.e. price, dates, times and location, if these have already been discussed with the company, etc.

The intervention approach within the company is composed of a series of processes. There are several steps and several ways of formalising the proposal, depending on the kind of background and contact made with the company. For example, there may be a document summarising the first meeting, then a more detailed one produced after the needs analysis and finally a last document mentioning the practical terms of the proposed training.

### **Training specifications**

The training specifications may vary according to the funding, workplace organisation within the company, the identified needs and the kind of training implemented. As regards core skills training, to help learners get settled in the learning process, very short courses (e.g. 2-3 days) should be avoided, except for specific training modules or when a course is extended.

The pace is to be determined with the company according to their availability and in order to fit into the employees' schedules. Indeed, if the training is organised during working hours, substitutes may be needed to cover for employees in training. This may have an impact on the training schedule and even the choice of participants.

## Defining a target group and a communication plan

### How to choose?

As a training provider, you don't always have the power to choose the target group, since a lot of practical reasons influence the company's choice:

- funding settings (that may concern some employees more than others)
- other mandatory training employees have to attend to
- employees' work schedules
- teams' composition

Nevertheless, you may advise the company and have a say in the matter if you precisely define your goals, analyse the needs, persuade and motivate key figures in the company.

### Knowing your goals

It is important to have an excellent knowledge of the subjects, goals and objectives of the basic-skills training. Only then, managers, foremen and colleagues can decide and appeal to other colleagues. The more specific the contents are, the easier the choice is.

#### **EXAMPLE:**

*With the workplace analysis in place, it has been observed that the cleaning staff do not understand written instructions, fill out documents incorrectly and have difficulties with registering in computers.*

*Contents and Objectives of the basic skills training are: understanding written instructions, writing and filling out workplace-based forms and learning how to use the computer.*

*With these guidelines, the potential participants can be easily identified. If the training program remains too abstract, choosing the employees who will join the training programme will not be your decision.*

### Analysing the needs

The company may have noticed people who experience difficulties but who would not necessarily volunteer, or alternatively, they may not have noticed people who experience difficulties but use avoidance and bypass strategies to hide the problems they face.

Thus, it is important for you to communicate with the company about those identified and at whom the training is aimed, as knowing the reasons for their choice is essential.

**EXAMPLE:**

*Mr S is a team leader in a construction company. He heard about the literacy training programme and asked his manager and the HR if he could be a part of it.*

*Mrs V is the training provider's literacy needs analyst. She meets with Mr S's manager who explains the following: "Mr S wants to do this training but I don't think he needs it, because he can fill out the forms and write. You can let me know but I don't see why he should go."*



*Mrs V meets Mr S and discussing the literacy and basic skills matter with him, she realises that Mr S brings his paperwork home and asks his wife to help him fill out the forms and do the writing he needs to do (reports, incident descriptions, etc.) He definitely needs this training programme if he wants to gain autonomy in his work, especially considering that he is a team leader.*

*Hence, Mrs V while being cautious about the content of her explanation and how to do it has the argument to convince the manager that Mr S needs to be involved in the training programme.*

### **Persuading and motivating key figures in companies**

This example also shows how important it is to convince and motivate all employees in the company of basic education training. The benefits of the success must all be exposed. In order to establish a basic education program, it is very important to attract key people in the company for this implementation.

In order to enlighten the companies on the content and target group of basic skills training it is important that the focus is on addressing the requirements of the workplace and not determined only by obvious characteristics such as migrant or not possessing any educational qualifications. The criterion is whether employees performed all the job requirements independently. If the focus is on groups, e.g. immigrants, this means that other employees are not recognised and taken into account. In general, the diversity of employees is very broad, but everyone should have an equal chance.

This is particularly important because training providers sometimes tend to set up groups according to “level”. It is important to bear in mind that this is not necessarily the most beneficial way to create groups in adult learning. First of all because totally homogenous groups do not exist – people who enter the training programme have their own identities, their own paths and cannot be characterised merely by their profile or the skill levels they appear to have.

What’s more, heterogeneity of paths and of “levels” can be seen as an asset to lean on instead of a burden in raising obstacles around learning.

When dealing with employees particularly, numerous other factors than their literacy levels ought to be taken into account, i.e. their role within the company, their needs or expectations at the workplace, and so on.

That being said, it is necessary to be aware of the learning profile of those who wish to be entered into the training programme. In fact, communication surrounding the training will not be exactly the same if the goal is to train people whose issues are more related to functional illiteracy, or people who tend to have an issue that is more linguistic-related.

#### **EXAMPLE:**

*In the context of finding solutions to functional illiteracy, a professional sector X has undertaken the task of bringing awareness to businesses. The branch gives consulting companies the mission of encouraging companies to set up training designed for people with literacy problems.*

*The consulting firm carries out an intervention prior to that of the training provider at the company, which helps them define their expectations for the training. During this exchange, the company mainly raises the issue of communication with the foreign employees, and thus the difficulties associated with listening comprehension and speaking.*

*It is, very often, far easier to spot someone who has obvious difficulty in understanding and speaking, and who wishes to learn the language of the country in which he/she has lived than someone who was born and schooled there and who does their best to hide their difficulties.*

*The consulting firm is skilled in designing training courses and in advising companies, but they aren't specialists in learning issues. In this context, the training provider intervenes only once the company has established the specifications, supported by the consulting firm. They don't have a say in the choice of audience.*

*The training will therefore be aimed at foreigners who need to learn how to speak and write the language. Then however, it will be difficult to include native speakers with functional literacy problems. Indeed, the latter will consider the training to be "a linguistic course" and therefore not matching their needs, because they know how to speak their native language.*

*If, on the other hand, the consulting firm had encouraged the company to identify the people with functional literacy problems, the training programme would have impacted upon the target audience and it would have been easier to go on to develop, if necessary, training programmes aimed at other employees in the company.*

As regards the choice of target audience, several cases can be identified:

- When the training provider intervenes, the people who will be involved have already been identified and informed by the company. The training provider meets the selected employees and may express an opinion on their motivation or even on the relevance of the training for the group or an employee in particular.
- When the training provider intervenes, the company has already profiled participants that it wishes to be involved in the training, i.e. workers doing the same job, from the same workshop, those likely to upgrade their skills, and so on. However, the company needs support to inform and involve them and to learn how to communicate in the most appropriate way.

In this case, it is possible to set up several meetings with various key figures in the company to implement a communication plan aimed at the targeted employees.

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## **ADVICE**

Find a name for the training programme. It should be evocative but non-stigmatising. Avoid titles such as “Re-learn how to read, write and count”. You could think of names that evoke the idea of progress and autonomy, for instance: “Key-competencies training course”, “Gateways”, “Springboard, improve your writing skills”, “Master your professional documentation”, etc.

Identify the key-staff in the company and train them, i.e. HR, management, people who work in close contact with employees targeted by the training, etc.

Those training sessions are set up in order to:

- Raise awareness on the issues related to core skills and functional illiteracy in particular.
- Give them tools to identify people having difficulty with core skills.
- Develop a strong evidence basis to present the core skills training to employees.
- Invent relevant communication tools such as posters, spreading the word about the training through meetings, showing a film about past training sessions, and so on.
- Determine concrete and facilitating methods of communication for those interested in the training, i.e. representatives can be the point of contact.

When this is done and the group is identified, the training provider organises interviews, together with the company, to meet the future participants and analyse their expectations.

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## Gathering learners' expectations and making them explicit

The literacy needs analyst meets the future learners individually during a “welcome interview” [1].

Interviews are essential and have several goals:

- Win the future learners' trust
- Explain to them the approach adopted by the trainer(s)
- Get to know the future learners' personal, educational, social and professional pathways
- Identify their core skills and the problem-situations they face
- Confirm their motivation and ensure they will attend the training course
- Understand the working situations of the employees to better identify the core skills needed in context
- Evaluate the future learners knowledge on various skills to identify their needs more precisely

The needs analyst who leads the interview explains the process and draws together the multiple strands from what the employees say. The aim is to gather as many elements as possible on the educational, social and professional experience of the person without being intrusive.

As regards the placement tests, the needs analyst must be careful: in case of time limitation, priority must be given to the discussion – the future learner must not feel as if he/she is taking an exam.

There are various ways to capture the basic skills needs of employees. These can be oral or written assessments. It is important that these assessments are based on the workplace literacy task analysis.

The purpose of the instrument is to identify what employees can do (skills) and not what they know (knowledge).

The next step is to analyse and report on company literacy-skills audit results. With these results, objectives, content and duration can be outlined. It is possible to design a first draft version of the basic-skills training.

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[1] Document: “EMPLOYEE'S FIRST POSITIONING”

## Carrying out an observation and analysing the employee's workplace

If possible, in terms of time and funding, it is of interest to carry out an observation of the workplace to understand the problem-situations the employee faces.

Below some tips are listed for the needs analyst(s):

- Visit the workplace as early as possible (before the training begins or at the very beginning).
- Make sure that the company has organised it well (place, time, presence of a manager, etc.).
- During the observation, explain clearly to those you meet who you are and why you are visiting the workplace.
- Use a job analysis grid to ask questions to both the employee and the manager<sup>1</sup>.

Just as when gathering the company and learners' expectations, the needs analyst initiates the explanatory process. While being observed, the employees are asked to explain what they are doing and why they are doing it that way.

Bear in mind that the needs analysts are "ignorant" and the employees are the experts in their job. (See chapter 1).

Points to identify during the observation:

- Context of work situation (location, team, representatives known by the employee at the workplace, specific constraints relating to noise, interaction with other companies or bodies, etc.).
- Employee's main tasks and mission.
- Activities related to the job for which core skills are needed (situations involving reading, writing, numeracy, oral communication, transmission of information, etc.).
- Learner's skills and difficulties when faced with these situations, with precise examples.
- Colleagues and managers being able to help the learner to transfer the learning outcomes to the workplace.

In terms of the agenda, when possible, the trainer who will teach the group should be able to spend some time with the managers, without the presence of the employees. This time generally enables him/her to gather general information on the organisation of the workplace and the company, to remind them of the training issues and the training process, and also to ask them about the skills and the difficulties faced by the employees.

<sup>1</sup> Document: "JOB ANALYSIS"

## Providing feedback to the company and the teaching team

The different stages of analysis presented bring us on to the subject of both company and teaching team feedback. In fact, it is important that all those involved in the project are well informed in this regard.

### To the company

For the company, it's a question of doing their utmost to ensure that the process is a success. The feedback must be given intelligently and with respect to those involved:

- You must have identified the key-staff who are to be involved and ensured that they will demonstrate a kind attitude towards the learners.

**Please note:** Mockery involving learning difficulties of any kind does exist in all businesses, from worker/employee-level through to management.

- Feedback of information does not mean regarding every minute detail. You must filter information gathered and provide only what is useful in order to advance the project. According to the company's availability, the feedback can be given through an official meeting or a more informal one, it can also be over the phone, but the needs analyst(s) must keep record of the content of the discussion.

**Please note:** Employees often bring up their personal life during welcome interviews as this is very much linked to educational difficulties particularly, or simply, because an atmosphere of trust is established. The training provider must remain discrete in liaising with the company, as they do not reserve the right to avail of any of this information.

### To the teaching team

For the training provider, it's a question of avoiding a "chopped-up" job with the needs analysts on one side and the trainers on the other. The trainer therefore will not necessarily intervene in all phases (establishing contact, gathering company and learner expectations), nevertheless, constant feedback and a steady back-and-forth between different members of the team is essential.

The project manager(s) ought to make sure that the feedback stage is well done by ensuring that meetings are organised and that their teams formalise documents to record all the steps of the process - from the analysis to the actual training course (see Document: "REVIEW OF INITIAL ASSESSMENT".)



## Chapter Three

From the needs analysis  
to the training programme

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There are both technical and underlying basic skills required in order to learn and transfer skills into the workplace. Additionally, employees will be at various levels of competency. For example, some may be very good at reading, but may struggle with writing.

To identify what basic skills are required to do a job can develop a variety of strategies that can be integrated into training. Building basic skills in training sessions is a good place to start in order to ensure the training meets the business goals and learning needs of employees.

The needs analysis stage will enable you to design the training programme: definition of objectives, structure of educational progress and learning material.

For the project manager(s) and the need analyst(s) (keeping in mind that depending on each structure's organisation, different functions can be assumed by the same person), it is a matter of passing the information to the teaching team and/or programme managers, so that they are able to:

#### **Identify**

- The learners' work situations
- Issues relating to progression (in their job, in a professional context)
- The expectations of the company and of the employees in terms of these issues

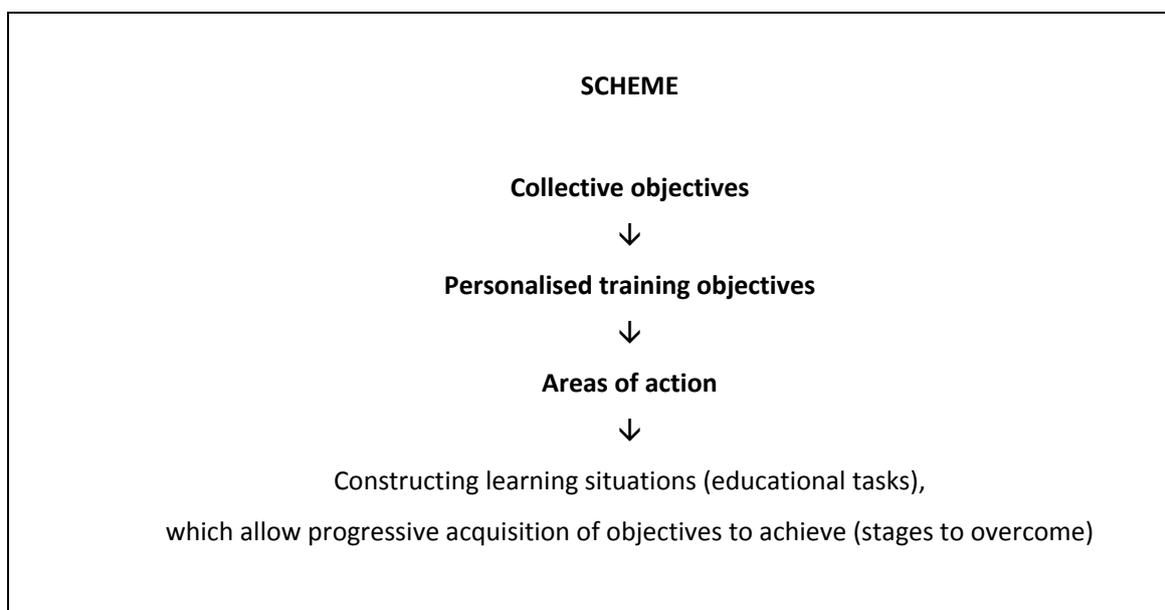
#### **Question and analyse**

- What are the necessary skills?
- What knowledge do these skills mobilise?
- Which skills have been developed by the employee(s) in question?
- What are the problem-situations linked to an insufficient command of core skills?
- What "work-around" and compensation strategies are they currently deploying to get around these insufficiencies?

#### **Understand the learning issues and primary needs of each learner.**

From this work, the trainer or the teaching team (sometimes the programme manager) develops

- the **collective objectives** for the whole group based on:
  - o the company's expectations
  - o the manager's expectations
  - o the learner's expectations and needs
  - o the time allocated to conduct the training
- the **personalised training objectives** for each learner, in consistency with the training objectives of the whole group
- the **design of the training programme**
  - o in accordance to the time allocated to conduct the training
  - o in accordance with the learning issues and primary needs of the whole group
- the **personal progress**
  - o in accordance with the training objectives approved by the company
  - o in emphasising the collective dynamic created (feeling of belonging to the same programme, structuring transversal training sessions)



This chapter addresses the trainer/teaching team that is going to take on the group.

## Being careful about your attitude as a trainer

The choice of content and the design of the course's structure, learning sequence or sessions, must be underpinned by the fact that the learners already possess the skillset to know and do certain things. Therefore, in order to encourage learners to acquire new skills, the course ought to be built on what they know and have done over the years, as well as on the strategies they have developed.

The choice of educational activities should avoid being interpreted as condescending. Adult learners should not be regarded as children (special attention must be given to the choice of resources and pictures, especially for people who cannot read).

The explanation of situations, be it during needs analysis or teaching, should never be simplified by the trainer. People do face complex situations in everyday life and at work, which they will be able to resolve by acquiring the basic skills to do so.

## Defining collective objectives and designing the training

Before defining the objectives, it is important to have a clear understanding of what is intended by the term "literacy skills".

Once the analysis of needs and expectations has been carried out, one should gather and examine the elements that are necessary for objective-setting as well as the general structure of the training. General areas for strategies are:

- What people read and write – procedures, documents, etc.
- Computers and other technologies
- Working with numbers
- Understanding charts and data
- Identifying and solving problems
- Communication and team work

**For example: Literacy on the job –construction site**

<b>Literacy on the job: READING</b>		
<b>VERY FREQUENTLY</b>	<b>FREQUENTLY</b>	<b>FROM TIME TO TIME</b>
Health and safety signage Warning signs in the construction site Construction drawings (foundation plan, outline, floor plans, vertical cut, details) Construction site time schedule and the weekly work plan Lists of tools and equipment required for tasks Road maps	Health and safety information sheets Personal hygiene rules (clothing, shoes, bodycare, availability and use of skin protective agents) Safety rules and regulations in regard to handling electrical implements (equipment, mains cables) Technical information (plans, drawings, reports, descriptions, manufacturers' installation instructions) Concrete recipes	Important clauses of the employment contract Working regime of the company: e.g. working hours, place of work, job function, holidays, sickness-/accident reporting General accident prevention rules and regulations (rights and duties of the employer and the employee) General rules of environmental protection Specification by the architect or client Storage regulations for construction materials and excavated earth
<b>Literacy on the job: WRITING</b>		
<b>VERY FREQUENTLY</b>	<b>FREQUENTLY</b>	<b>FROM TIME TO TIME</b>
Documentation of the results of work (diary of work completed) Fill out timesheets and leave forms Writing detailed lists of all the equipment and tools they will be needed to complete a job Writing of materials list Writing notes for foreman to explain what have been done, leave instructions	Produce a sketch with explanations for the construction site installations Inspection of construction site installations on the basis of the check list and compilation of construction site information Compile and update stock lists and inventories	Record registering, reporting and assessment of injuries Documentation of the results of work as reference for follow-on work (location of pipes, base of roadways etc.) Log recipes for produced concrete mixtures
<b>Literacy on the job: SPEAKING AND LISTENING</b>		
<b>VERY FREQUENTLY</b>	<b>REQUENTLY</b>	<b>FROM TIME TO TIME</b>
Talk to other colleagues to coordinate the work Communicate on work issues to co-workers Listen and respond to verbal instructions and explanations from the supervisor Ask clarifying questions to check the information given Report the progress made on the work Communicate and coordinate with other trades people working on the same site Reporting and correcting inconsistencies and defects	Order supplies or equipment from suppliers (face-to-face and over the phone) <sup>13</sup> Participate in team meetings Report to manager about anything affecting the job process Request assistance from others Listening technical information (reports, descriptions using plans and drawings) Listening to servicing and maintenance rules	Discuss problems with a working plan with supervisor or other co-workers Safety precautions: mention the rules and inform others
<b>Literacy on the job: CRITICAL THINKING</b>		
<b>VERY FREQUENTLY</b>	<b>FREQUENTLY</b>	<b>FROM TIME TO TIME</b>
Choose the best and most efficient order to complete a job Choose the correct method and tools to use to complete a building task To do a job by yourself or need help from others Inspect results of work check if work meets with the standards	Deal with changes to work plans Discuss and agree on changes to the plan Identify if changes need to be referred to co-workers and supervisors Identify problems and develop solutions Inspect and evaluate results of work: Determine errors and record inspection results; compile daily work report (for self-assessment); consider work sequences and illustrate improvements; final calculation of material quantities and dimensions	Deal with unexpected issues and emergency situations Deal with contingencies e.g. problems with tools or equipment, injury or accident
<b>Literacy on the job: INFORMATION COMMUNICATION TECHNOLOGY</b>		
<b>VERY FREQUENTLY</b>	<b>FREQUENTLY</b>	<b>FROM TIME TO TIME</b>
--	Use of surveying instruments Using computer as aid to storekeeping	Use GPS based tracking and navigation technology in the vans Use the internet to look up sources e.g. manufacturer or supplier information, road maps Surveying instruments: knowing function of the equipment Surveying instruments: Surveying methods, scaling and conversion of scaled down dimensions

Based on this list, then the objectives can be outlined and defined.

## **The collective training objectives**

Some of the training objectives have been defined during the previous phase, and are also made clear in the document serving to ratify the contract with the company and/or funders of the training.

Nevertheless, since you are going to form the group, you must appropriate and formalise them in order to structure them into your practice. These objectives will serve to define a training design.

### **EXAMPLE:**

*In France, a training provider has proceeded to the needs and expectations analysis stage in a construction company. The group is mixed in terms of level of learning issues, position and level of responsibility within the company (it is made up of lower-tier workers, team leaders and site leaders, who could be “FFL”, “illiterate” or experience some degree of functional illiteracy). The training objectives will be the following:*

- Explain a work task*
- Understand and orally communicate work and security instructions*
- Explain an anomaly or malfunction; discuss a point of view, justify a choice*
- Read (and understand) instructions and procedures linked to the workplace; read and understand pictograms, security notices and instructions, etc.*
- Fill out a form concerning identity (Surname, first name, address, telephone number, date and place of birth, marital status, etc.)*
- Fill out professional documentation: time-sheets, leave request forms, etc.*
- Give a written account of an anomaly or malfunction*
- Use a plan*
- Independently use a personal computer (programmed with Windows): word processing, messaging, researching information on the Internet*

## **The training design**

The general objectives are associated with themes related to professional activity. Creating the design of the training will therefore consist of organising issues in such a way as to structure the acquisition of skills.

In fact, each area of vocational activity requires the demonstration of core skills. In terms of professional sector, it will be essential to determine the key themes on the basis of the concerned jobs, the learners' profiles and the teaching methods (activities, time taken, location etc.). It will be equally necessary to question the core skills that these themes allow one to work on.

Finally, the trainer has to bear in mind that the training scheme must be a progression i.e. not a catalogue of professional themes and key skills. Indeed, some topics have to be brought up before others in order to build up the course, and make sure the participants acquire the desired key-competencies. To succeed in designing a real progression, you have to ask yourself which steps are necessary to acquire a specific competence.

### **EXAMPLE FOR A SPECIFIC OBJECTIVE:**

*A specific goal for a group of industry workers is to be able to give precise oral reports to the maintenance service when needed. Firstly, they have to be able to identify the problems they currently have to report to the maintenance service. Secondly, they have to identify which piece of information is relevant to pass on. Finally, they have to learn how to shape an oral message so that they manage to pass on precise information in an efficient way.*

### **Example for a whole training COURSE:**

*The training for the workers and team leaders of the construction wing of this company is implemented through 16 sessions in one day. In accordance with the objectives that have been listed above, we can imagine the training's design to be something like the following:*

- Session 1: Introduce themselves and their occupation*
- Session 2: Describe work tasks, materials, tools and machinery*
- Session 3: Identify and analyse the situations of oral communication at work*
- Session 4: Identify professional documentation and the situations in which it may be required*
- Session 5: Manage professional documentation*

- *Session 6: Identify units of measurement relevant to work and the situations in which they are taken*
- *Session 7: Demonstrate work carried out and giving instructions for work to be carried out*
- *Session 8: Understand security instructions and pictograms,, identifying risks and precautions*
- *Session 9: Analyse a risk,, describing an accident*
- *Session 10: Identify the different types of plans and maps used, directing one's way around a map*
- *Session 11: Measuring, converting units of measurement, making surface area calculations*
- *Session 12: Make an inventory of malfunctions and problems encountered*
- *Session 13: Describe malfunctions and anomalies, calculate proportional quantities*
- *Session 14: Describe the main stages of a construction site*
- *Session 15: Use the scales of different plans/maps*
- *Session 16: Compile an assessment of the training, evaluate the training achievements*

Throughout the training, the trainer will be able to make the choice of working with IT as a transversal knowledge in all sessions by linking it consistently with the discussed theme.

Here are some examples of activities and situations (the list is not exhaustive):

- Typing messages or documents with word processing (for demonstrating and describing)
- Internet research in relation to vocabulary used (work on professional lexicon)
- Visualisation of plans/maps with the possibility of using the zoom function (work on direction and spatial representation)
- Use of electronic messaging (for demonstrating tasks carried out, signalling a problem, etc.)

## Defining personalised objectives

As a reminder, the **personalised training objectives** proposed for each person will be based on an analysis of:

- The work situation of the employee,
- The progression demands on behalf of the company,
- The potential professional project of the employee,
- The necessary skills,
- The knowledge that these skills mobilise,
- The skills already developed by the employee,
- The avoidance strategies put in place, and
- Stated weaknesses (in work, from the positioning and assessments carried out in the initial training sessions).

The personalised training objectives are an application of the general objectives for each participant. You will start, therefore, with the general objective and adapt, refine and detail it according to the expectations and the potential of the individual engaged in the training, in agreement with the learner.

**EXAMPLE:**

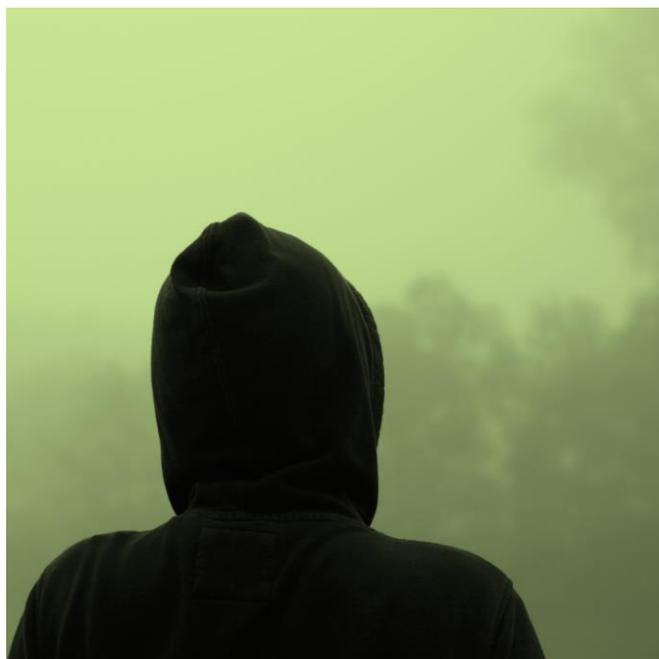
**One of the training's general objectives is:**

*"Understanding and orally communicating work and security instructions"*

*We are going to develop this objective through examination of two learners who have quite different work situations and profiles.*

**Learner no. 1: Manuel**

*Manuel is a road worker and generally works with a team of 3, plus one team leader. He is of Portuguese origin, was educated in Portugal until secondary school age and arrived in France 3 years ago. He has never benefitted from any French-language training nor, more generally, training in core skills. He has a good level of understanding the language if spoken to at a slower pace; however he is not very familiar with the key technical terms related to his job. He knows his job well, as he has worked as a labourer for several Portuguese and French companies over a period of 20 years. He therefore works very well from habit; nevertheless, he can make mistakes if the task at hand has an unfamiliar aspect, for which his team leader gives him precise instructions.*



*As he doesn't want to "seem stupid", Manuel doesn't ask for the instruction to be repeated when he doesn't understand, and as he is a good worker, his team leader doesn't always feel the need to check that he has understood. Additionally, Manuel doesn't command a professional lexicon as he has got into the habit of showing objects, tools and machinery in order to make himself understood. He seldom has the chance to transmit these instructions himself to his colleagues.*

*As part of this 16-session "core skills" training (session carried out over one full day), and with the aim of achieving of the general objective stated above, the specific objectives of Manuel's training shall be:*

- To be confident enough to alert someone when he has not understood an instruction or an oral explanation*
- To be capable of rewording the key elements of a work instruction*

***Learner no. 2: François***

*François is a construction site leader. He manages a team of workers. He was born and educated in France until the end of secondary school. He then studied to get a vocational diploma in construction, followed by ten years working in the sector until he was appointed as a labourer for this company 7 years ago. After 2 years, he became a team leader then a site leader at the end of 4 years. François has an all-encompassing vision of which tasks to carry out and how to organise them. However, his work is based on habit and since he is a real professional, the job to be done seems obvious to him. He, therefore, experiences difficulties in putting himself in the shoes of someone who doesn't understand work or security instructions.*

*He uses a noticeably technical vocabulary with very concise indications, and he doesn't always reword his explanations when the person he is speaking to does not understand them.*

As part of this “core skills” training, and of the “**Understanding and orally communicating work and security instructions**” general objective, the specific objectives of François’s training will be:



- *To be capable of explaining tasks to be carried out in the required order,*
- *To be capable of ranking work and security instructions according to urgency of situation, and*
- *To be capable of accounting for the level of understanding of the person with whom he is speaking (rewording explanations, using simple and precise vocabulary).*

This work, consisting of developing the general objectives and personalised objectives, will be carried out and later, will be presented to the learners in the form of a checklist [2], in the first third of the training.

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[2] Document: “PERSONAL GOAL CHECKLIST”

## Preparing the training sessions

Once the training's design is defined, the training course can begin. It's therefore a matter of building the exact content of each training session and the organisation of activities. You must keep in mind that you must enable the learners to work just as well in a group as individually, in accordance with the objectives and also with alternating times in the training.

As the training is articulated to work situations and therefore professional themes, an easy option is to propose an oral activity to a big group based on one theme, then to develop this activity (written, exercises, role plays, etc.) in smaller groups or individually.

In order to help you to formalise your training sessions, you can use this session-plan template<sup>[3]</sup>.

## Maintaining the link with the company

As already discussed in the guide, the link with the company is essential for the smooth running of a training programme, along with several other factors (see Chapter 1):

- The intervention team must analyse the expectations of the company, the work situation of the learners, in order to define the adapted objectives
  - o There is no production of new skills:
  - o without modification of workplace organisation,
  - o without considering learners as agent(s) in their learning process, and
  - o without transferring new skills to a work situation.

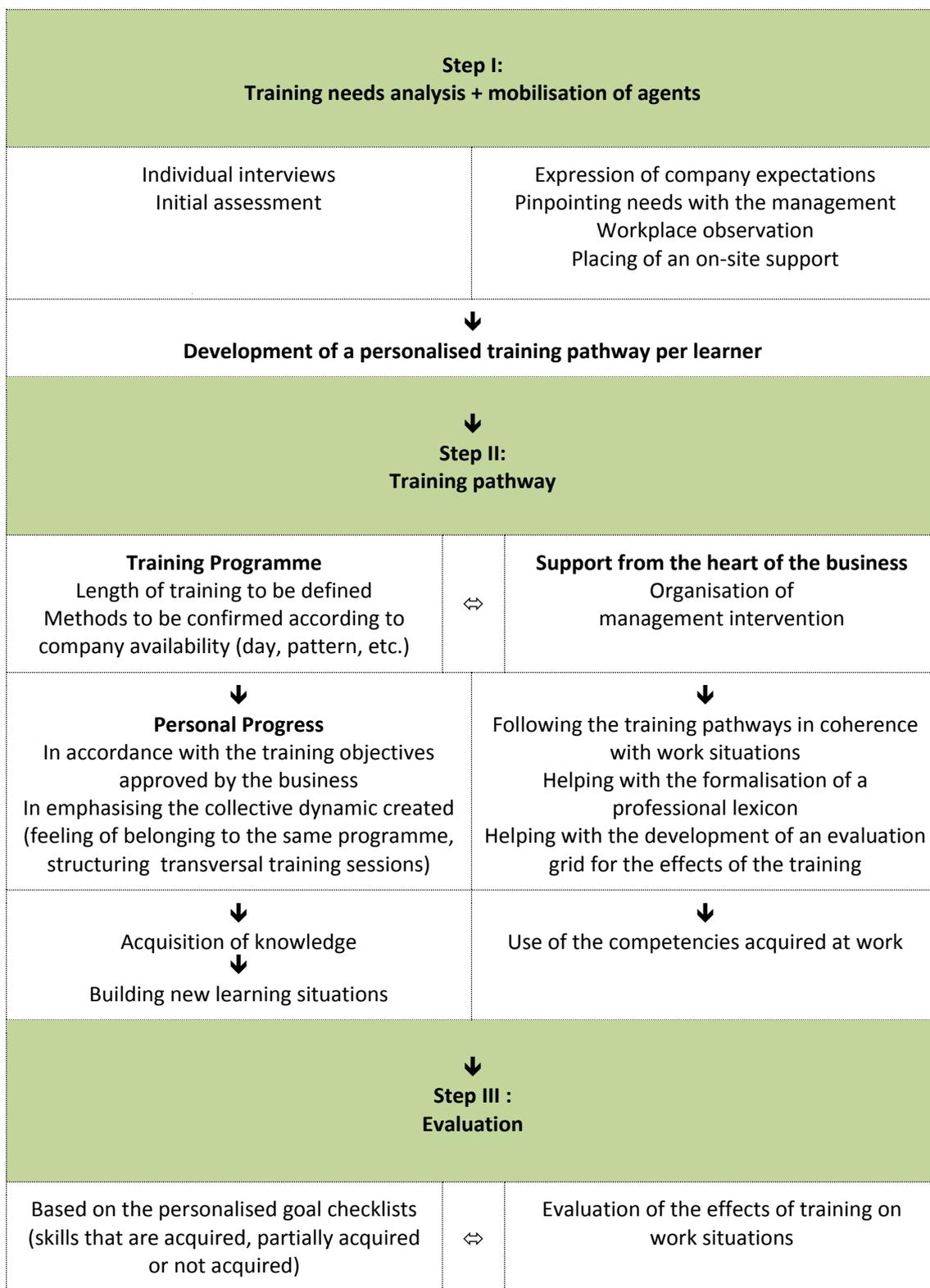
Throughout the training programme, the link is maintained:

- through formal meetings: organising meetings, assessments and interviews
- through informal encounters: discussions within the business if this is the location for the training, regular e-mail and telephone exchanges, etc.

Here is a summary of the training agenda with a focus on the back-and-forth between the company and the intervention team.

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[3]Document: "SESSION PLAN"



## Practical and educational aspects

### **Duration of the training course**

It will be difficult to decide on the duration and the rhythm of the training you are going to run.

Several factors can impact this decision:

- Time that the company can and wants to grant to its employees for the training
- Specific or general needs identified
- Defined budget (depends on the type of funding)
- The season (for instance, bad weather in the BTP will force the company to plan the training in winter instead of working outside)
- Working schedules of the employees and company planning, for instance :
  - o In the cleaning sector, fragmented hours during the day
  - o In the industrial sector, night work
  - o In construction, working far away for extended periods
  - o In logistics and commerce, busier during holidays
- Company's vocational training planning (machine driving license, equipment-use training, IT training, etc.)
- Function of the employees involved in the training programme (sometimes it can happen that foremen can have difficulties being substituted, hence it's better to plan training sessions at the end of the week, or at the end of the day)
- Imperatives linked to your own planning and level of activity: you may want to balance the number of groups and projects throughout the year

## **Educational aspects**

In order to match the training to the reality of the employees' job, pay special attention to:

- Creating support material in direct link with the reality of the work in the company: authentic company documents, educational support made out of authentic documents.
- Creating scenarios close to those experienced by the employees in their jobs.
- On special occasions, inviting other company staff to participate: for instance, if you work with the learners on "How to read a pay slip", invite the accountant.

In order to take into account the different employees' needs and expectations, pay special attention to:

- Working collectively on unavoidable themes of the training course.
- Frequently organising sub-groups or even individual time during which the support material and activities are adapted to their needs.
- Always allow the employees to recall what they have learned, what topic they need to go further into, what new things they need to learn.

## **Learning settings**

Concerning the training location, you won't necessarily have a say in this. However, you can make sure that the minimum requirements are ensured:

### ***For the location of the training space***

Being based at the workplace has its advantages and its disadvantages. Indeed, it allows the trainer to have proximity to the managers, to closely observe the employees' job situations, to get informal feedback about the training course on a regular basis. At the same time, the closeness with the usual working team (immediate superiors, colleagues, etc.) can have a negative influence on the employees during the training.

It is necessary to be careful because the training if at the workplace could occasionally:

- Be interrupted by work (employees have to talk to a colleague, give a document to the administration, temptation to go and see what is happening at their workstation while they have been gone, therefore taking up their learning time, etc.)
- Create learning obstacles (for instance, ashamed to be seen in training, colleagues passing by, damaging concentration, etc.)

***For the training room***

The size must be adapted to the employees, it must not be too noisy (noise of machines, for example), and it must be equipped with a minimum amount of material (something to write: a board or a paperboard, tables and chairs in sufficient number, etc.).



## Chapter Four

From the acquisition of skills  
to the evaluation and  
transfer to the workplace

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This chapter will focus on two fundamental aspects of the employee training programme. The evaluation of the training's effects and the transfer of training acquisitions to the workplace.

An evaluation programme:

- demonstrates employee skills development
- identifies skills development gaps and future needs
- ensures that the training sessions are meeting the learners needs
- makes sure learning translates to on the job performance

The Literacy@Work methodology advises the promotion communication between trainer and all involved throughout the training course process by way of:

- encouraging the employee involved in the training course with regards to his/her progress,
- promoting consolidation in professional situations of the dynamic created by the training course.

## A continuous evaluation

Evaluation is an integral component of a qualified basic skills training program. A good evaluation programme must:

- track and demonstrate employee skills development
- identify skills development gaps and future needs
- ensure programs are meeting participants' needs
- make sure learning translates to on-the-job improvement
- ensure the training programme continually improves through assessing training benefits and revising, if necessary, future training strategies
- establish the return on investment

As discussed, the training of employees is made up of a series of processes. In the same way that the training content is enriched by the feedback of the learners and the information that the trainer receives and analyses (with managers and other resource personnel in the company), the process of evaluation is progressive and on-going.

Exam-style evaluation at the end of the training should be avoided at all costs.

Therefore, waiting until the end of the training in order to evaluate its effects must be completely ruled out.

The evaluation is continuous and is conducted on several levels:

### **Formal evaluations ...**

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... are carried out, in training sessions, in the form of specific tests, developed according to the table of objectives, for measuring the achievements of each learner as they advance along their training pathway.

**EXAMPLE:**

*One of the employees involved in the training programme has to learn how to properly fill a malfunction report. The trainer will have made progression related to this specific objective and at each step of the progression he/she can evaluate the ability to fill in the document.*

*The evaluations will at first be quite simple and always in correspondence with what has been learned, and at the end of the course, the trainer will evaluate the employee using the real company document he has to fulfil.*

- In a **more informal manner**, the trainer must evaluate the effects of the training throughout the course through observation of the learners while they are engaged in activities. This can be done by establishing observation tables based on specific objectives for each learner, allowing them to note down and analyse the progress that has been made.*
- **Learning diary or working with portfolio** makes the learners' progress visible and can be used to clarify the effects of the training.*

**EXAMPLES:**

- One of the learners' objectives is as follows: "To have the confidence to alert someone when [he hasn't understood] a verbal instruction." The trainer would be able to see if, throughout the course of the training, this person had the confidence to alert someone when they hadn't understood, and ask for an explanation. If that is the case, the objective has been achieved, at least in the context of the training. It would then be necessary to verify if this skill has similarly been acquired in a workplace situation.*
- A learner has the following objective: "To be capable of filing professional documentation". The trainer will be able to observe if this learner gains autonomy when she is required to file the supporting documentation of her training. The trainer will also be able to set exercises related to filing professional documents at several points throughout the training, in order to evaluate these skills little by little.*

## The interim review

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An interim review will inform all relevant involved staff of the mid-point results, including progress, successes, difficulties and anticipated problems. The interim report may be the occasion to check objectives and goals, e.g. establish if there are necessary changes or if the set-up goals and the training course contents are relevant.

This step brings together employee-learner, line manager and trainer in order to discuss the preliminary effects of the training evaluated by the trainer, these are explained by the employee and observed by the line manager in concrete situations.

It is also an opportunity:

- to present the group and the framework of the training to parts of the staff and key-members of the company, who haven't heard about the training course yet,
- to gather new information that will allow content-enrichment for future training,
- to gather the learners' and managers' expectations that have emerged since the beginning of the training,
- to get general feedback from the learners on the organisation and the implementation of the training.

## The final review

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This step brings together employee-learner, line manager and trainer with the aim of discussing the IMMEDIATE effects of the training gain with three points of view

- considering concrete methods of perpetuating the learning process
- discussing the possibilities of transferring acquired skills to the workplace

**Note: Mid-point interviews and/or those from the end of the training course** could be added as part of these reviews, bringing together trainer, learner and line manager, which would allow for a more personalised work evaluation.

When this is possible, it is all the more effective to organise an interview and/or meeting time several months after the end of the training to evaluate the long-term effects.

## Transferring skills to the workplace

### **A transfer encouraged throughout the training pathway**

As discussed, the training has limited effects if there is no transfer of skills to the workplace. Trainers mustn't wait until the end of the training to encourage and organise this skills transfer. Therefore, the observation and analysis of the learner's work must allow the trainer to identify:

- the situations in which they can put into practice what they have learnt in training,
- the person (or people) able to help the learner to put these skills into practice (colleagues, supervisors, etc.).

At the end of the course, since the transfer of skills from the training can only be ensured at the heart of the company, it is necessary to formalise a project with the company and/or the resource personnel in the company to accompany this transfer.

Indeed, the transfer of learning outcomes can only be ensured if the company is strongly involved. This can be best achieved by initiating a separate sub-project. The best time to initiate this sub-project is after the needs assessment and parallel to the course development. A transfer agreement governs how the employees will implement their learning outcomes in their daily work.

This agreement contains information about what kind of competencies and skills should be learned and the impacts that are expected in terms of the daily workload. In addition, the available resources to achieve these learning goals were documented (e.g. opportunities for testing and implementation in terms of time and content).

The objectives to be achieved via the training programme can be described as “desired or acquired competencies”. Having acquired competency means mastering a certain kind of task or problem by successful and goal-oriented use of skills and abilities. Normally, this description is a product of the clarification of the workplace requirements and the needs assessment and it is the basis for planning the training program.

Successful learning is manifested by changes in behaviour, processes, settings and attitudes. Each of these changes has an impact on the surroundings and on daily work. This may cause problems in implementing what employees have learned. To prevent this, it is important to talk about potential and intended changes in time. In addition, changes through training programs and learning processes are often only possible if they take place simultaneously with changes in work processes, working conditions and cooperation.

## The steps

### 1. Convince the management

Implementing the transfer project requires the commitment of the management. The management needs to know the benefits and objectives and needs to be fully committed to the project. They must appreciate the project as a win-win situation for the company and for the employees.

### 2. What is the content of the transfer agreement?

The employee - employer - project management triangle is the crux of the transfer project. A transfer agreement governs how the employees can implement what they have learned. The agreement has three parts:

#### ***PART 1: Anticipated skills and competencies***

The objectives of the training programme are described as “anticipated skills” (to use purposefully necessary skills and abilities in order to cope with a certain type of task or problem).

#### ***PART 2: Impact on social and working environment***

Successful learning manifests itself by changes in behaviour, chains of actions, preferences, etc. Each of these changes is therefore usually also relevant to the working environment and workflow.

This may create resistance, which makes it difficult (or impossible) to implement what the employees have learnt. To prevent this, it is important to address possible and intended changes.

Individual changes through training programmes are often only possible if some changes in the processes, in working conditions and in team cooperation are made.

#### ***PART 3: Agreement of resources and support***

Resources, in this context, refers to:

- **Creating opportunities to implement** the learning outcomes.
- **Time reserves.** When and how this implementation can be carried out in addition to the normal workload. As learning processes require time, in what time frame can the expected results be reasonably observed?
- **Tandem partner.** A good way for the transfer of learning outcomes can be two colleagues helping each other.
- **Monitoring by the management**, i.e. through regular short meetings.

## **GENERAL ADVICE**

Here are some tips to ensure the quality of the transfer project:

- Select and set up a project team
- Clarify responsibilities and roles (collaboration between internal and external experts)
- Make an agreement on the resources (financial, human)
- Make a transfer agreement
- Consider the risks (obstacles for a successful transfer of learning outcomes within the company)
- Evaluation

## LAYOUT

Profund GmbH, [www.profund-gmbh.de](http://www.profund-gmbh.de)

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