

Collaborative Workplace Development: an overview

by

Sue Folinsbee Paul Jurmo



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Collaborative Workplace Development

An Overview

by Sue Folinsbee Paul Jurmo



AUTHORS

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From 1981 to 1986, Sue was a curriculum developer, instructor trainer, instructor, and evaluation specialist for the federal government's language training program. She worked for many years identifying and responding to education and development needs in diverse workplaces - first as Multicultural Workplace Program coordinator at George Brown College in Toronto, and later as a training and development specialist with her own consulting firm.

Sue has authored several documents on workplace basic skills education, including *An Organizational Approach to Workplace Basic Skills: A Guide for Literacy Practitioners*.

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Paul Jurmo first worked in adult literacy programs in 1976, when he began five years in village education programs in The Gambia, West Africa. He completed a doctorate in international education at the University of Massachusetts in 1987. His dissertation became the basis for *Participatory Literacy Education*, a 1989 study of learner-centred literacy efforts in the U.S., which he coedited with Hanna Arlene Fingeret. From 1984 through 1990, he served as senior program associate at the Business Council for Effective Literacy in New York.

Since 1991, Paul has run Literacy Partnerships, a consulting firm based in East Brunswick, New Jersey. He specializes in the collaborative planning and evaluation of literacy efforts, especially in the workplace. This participatory model is designed to help create a new kind of economy and society that is both more efficient and more equitable.

His current projects include development of collaborative workplace education curriculum models and several electronic mail networks linking adult educators.

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ABC CANADA supports the development of an educated, flexible, and fulfilled workforce through fostering lifelong learning.

ABC CANADA raises awareness of literacy issues, encourages workplace literacy programs, represents the private sector in public policy relating to basic skills, and supports local literacy organizations across Canada.

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Sue Folinsbee Paul Jurmo

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GLOSSARY

action plan

A description of tasks to be accomplished in order to carry out a strategy. Usually includes a timetable for review and reporting, and specifies the responsible parties. It may also include a budget.

brainstorming

A technique for generating ideas, usually by a group, in which all suggestions are written down without comment or discussion.

collaboration

The involvement of all interest groups.

continuous improvement

A management philosophy whereby every product, service, or process within an organization is subject to continuous scrutiny and improvement.

cultural interpreter

A person who not only can translate language but also has an in-depth understanding of the primary cultures of both parties in an interview.

ethnographic interviewing

A way of eliciting information from people that respects the cultures from which their own experience is drawn, rather than the culture of the interviewer.

evaluation

A formal process in which the elements of a workplace development initiative are examined and interpreted to determine how well the initiative is meeting its goals. Ongoing evaluation allows an organization to plan improvements to the current initiative and to plan future initiatives. It allows decision makers to make informed decisions about support.

funder

A person, agency, or organization that provides money for a specific purpose. Such funds mayor may not be subject to conditions agreed to by both parties. (Note: We use this word, despite its not being defined in any of the better-known dictionaries. It's a useful word that has come into fairly common usage, especially for programs carried out by the non-profit sector.)

goals

What we hope to accomplish through a workplace initiative.

key contacts

Designated representatives from management and the union or other employee group.

key findings

Information that is collected by a planning committee and considered to be particularly important.

learning organization

A group of people who, over time, enhance their capacity to create what they truly desire to create. This is likely to involve not only new capacities, but also fundamental shifts of mind, individually and collectively. (—from Peter Senge, who coined the phrase)

open-ended questions

Such questions demand information; they can't be answered with a simple yes or no. The questioner hopes to elicit thoughtful, in-depth responses.

organization

A general term we use to describe a conglomeration of people and various resources that work together for a common purpose. In reality it could be a company or a division of a large company, a hospital, a government department, a co-op.

planning cycle

planning cycle A series of steps for carrying out a workplace development initiative. (Refer to the diagram "Planning a Workplace Development Initiative")

stakeholder

A term that is used by some in the workplace education community to refer to groups or individual people who have an interest in workplace development. We prefer *interest group*.

strategy

A planning term that describes a range of steps necessary to realize a goal or objective. Reaching a goal can involve one or more strategies.

systemic discrimination

Practices that treat some members of a workforce unfairly or unequally with respect to others. Such practices result from the way the overall system works, rather than from individual actions.

workplace development

Everything that is done to improve the ability of an organization and its employees to meet their goals.

workplace development initiative

A planned set of activities that respond to workplace needs and issues. Includes workplace education and training and other change-related activities. Often referred to in this handbook simply as the *initiative*.

workplace education

A generic term that encompasses a variety of basic skills training and education programs that might be offered to employees in the workplace. Programs can include, for example, job-specific basic skills courses, work-related and personal development courses, grade 12 equivalency, study and test-taking skills courses.

workplace needs assessment

(WNA) A systematic way to identify all workplace needs, not just those that require an educational response.

INTRODUCTION

Today's changing workplaces and increasingly diverse workforces demand special attention. Often, the old skills and ways of organizing work just don't fit anymore.

Our work deals with the workplace changes and needs that affect both people and organizations. Our tools include training, education, and methods for changing the way things are done. This involves language that may not be familiar to everyone. So the first thing we'll do in this booklet is explain some of the terms.

Some definitions...

Workplace development is a general term that includes everything that is done to improve the ability of an organization and employees to meet their goals. A workplace development initiative is a planned set of activities. We will often refer to it simply as the initiative. We use this word rather than program or course because workplace development goes beyond training and education.

For example, your initiative could entail a single basic skills course. Or, you may offer many different programs, including learning to learn, clear writing seminars, or diversity training. You could integrate basic skills and diversity issues into the regular training and orientation programs given to all employees. You might change your training policy to make programs: more accessible to all groups. An employment equity review could be part of your initiative.

Collaborative workplace development simply means involving everyone who has an interest in the outcome. It implies working together.

We refer a lot to planning, without which very little will go right. Planning involves identifying issues (the things that concern us, the reasons for undertaking workplace development in the first place), setting goals (what we hope to accomplish through an initiative), forming strategies (how we will meet the goals), and assigning actions (to carry out those strategies).



What is this overview for?

This booklet presents principles of good practice and steps for planning and putting into place a collaborative workplace development initiative. At the same time, we recognize that there are many different approaches to workplace development in the field, and our principles

may not be the only ones.

This is also an introduction to a series of handbooks that deal with specific components of workplace development, such as needs assessment, evaluation, and curriculum development.(*)

Who will benefit?

This booklet is for those of you who are responsible for training and education and workplace development — educators, managers, union leaders, HR people, others — but above all, facilitators of workplace development initiatives.

Our work will appeal to those of you who:

- Are involved in workplace change technical, cultural, workforce-related, or organizational.
- See enhancing basic skills such as reading, writing, math, oral communication, using computers, and problem solving — as only part of the challenge facing today's organizations.
- See training and education as only part of the response to that challenge.
- Believe that all employees should be able to take part in planning and effecting workplace development.

What will it do for you?

This booklet will help you:

- Decide whether this is the right approach to workplace development for your workplace.
- Form your own principles of good practice.

Wanted: Better planning

Workplace development can easily suffer from poor planning. Too often, needs assessments and evaluations rely on narrow points of view and standardized tests that don't consider the realities of the workplace. Too much emphasis on education and training components can be inappropriate when an organization should also be paying attention to other needs.

Too often, there is not enough consultation with workplace interest groups.

The result? — programs and activities that do not target everyone's needs and interests; people who neither get the benefits they should nor give the commitment they could.

^{*} For information on ordering other handbooks in this series. see *Ordering Information*.

The collaborative method

Collaborative workplace development involves all interest groups, and is guided by a set of principles. It includes workers, employers, unions, educators, and others in all aspects of planning and carrying out initiatives.

Together, these interest groups should be able to:

- Plan a needs assessment for the workplace.
- Develop an action plan to meet identified needs.
- Gain commitment for that action plan.
- · Assess and use available resources.
- Put programs into place and effect changes in workplace practices.
- Plan and carry out an evaluation.
- Communicate effectively with the workforce at each step of an initiative.

Each workplace is unique. Aspects of the workplace culture — such as management style, size and make-up of the workforce, and geographical location — will affect how you approach development.

From experience, we know that certain existing conditions in the workplace are favorable, if not essential, to using collaborative methods. Here are some of those conditions.

- Collaborative decision-making ethic, methods, and skills are already in place in the organization.
- Respect, trust, and confidentiality are valued.
 Employees feel secure in expressing their ideas, needs, and concerns without fear of repercussion.
- Interest groups have committed time and other resources to prior or existing initiatives.

We believe that the active involvement of all interest groups will lead to effective development in workplaces that meet the above criteria. Furthermore, people who are involved not only take ownership of the workplace initiative, but they also develop skills and expertise that they can use elsewhere in the workplace or back in their own communities.

Advantages of collaborative workplace development

When all workplace interest groups are involved in identifying workplace needs and determining suitable responses, they are much more likely to support new ideas.

Note: The power relationships within an organization can wreak havoc if openness is not really valued or respected.

Gain support for and commitment to change

Get the big picture

Involving all interest groups can help identify all needs in the organization. You will learn how basic skills needs relate to other workplace issues.

Contribute to the participatory workplace

Participatory organizations — learning organizations and those that have total quality or employment equity programs — may find that collaboration fits well with their philosophies.

Meet organization and individual goals

When all interest groups are involved in making decisions, workplace strategies can be tailored to meet the needs of both individual workers and the organization. People on a workplace development committee gain skills that are valuable in other situations in which they must work in groups on or off the job.

Principles of good practice in workplace development

We believe that principles are necessary to guide workplace development. A set of principles is especially useful where there is some question about how to proceed; it helps us make decisions.

For example, if management doesn't want to include everyone in planning and carrying out workplace development, how would you proceed? You could decide to get what you can and negotiate a procedure that might not be ideal for all interest groups. If you strongly believe in collaboration and the principle of participation, you might prefer to back away from involvement altogether. What you do will depend on the strength of your own values and heliefs.

We offer these principles of good practice as a work-inprogress. They have been developed and revised as a result of discussion with many colleagues across North America about what contributes to success in workplace development initiatives.



Workplace development should build on the strengths and skills of people and organizations. We want to avoid language and actions that focus on how people are deficient and what they lack. Instead, what we say and do should reflect what people know and aspire to do well. This leads to confidence and positive action.

EMPOWERING: a way to remember the principles of good practice. See the chart on the following page.

Principles of Good Practice in Workplace Development

Effective integration of workplace programs

Multiple activities

Participation of all interest groups

Options on the future

Worker-centred orientation

Equality of opportunity for participation

Respect for all

Inspiration of potential participants

Needs orientation

Goal orientation

from Workplace Education: A Planning & Information Seminar 1992 ABC CANADA

Effective integration

Workplace education programs should be part of an overall workplace development plan. For example, clear writing can be part of an organization's commitment to improving communication.

In-house instructors should be sensitive to workforce diversity and the basic skills needs of course participants.

Any program that is an add-on, and not part of a workplace education or development strategy, is likely to produce only short-term results.

Multiple activities

A successful response to the needs of a changing workplace will involve many different activities — from training programs through designing new policies and changing practices. Everyone is a potential learner, and there are many possible ways to meet both personal and organization goals.

Participation

To get the big picture, we need the opinions and ideas of as many people as possible. Any group (union, management, or workers, for example) that has an interest in workplace development must be involved.

In unionized workplaces, the union should be an equal partner. Where the union independently offers skills upgrading opportunities, it's important to involve all levels of the union leadership and membership.

Option on the future

Organizations and individual employees will continue to have evolving needs. Therefore, there will probably be a continuing need to deal with basic skills and other workplace concerns. To be ready for the future, organizations must plan for ongoing financing and regular review of initiatives. This suggests a long-term strategy.

Worker-centred orientation

Historically, most workplace education and training has been offered to management and professional employees. New programs that are for workers must focus on *their* needs. Furthermore, participants should be able to take part in all aspects of the programs — including goal setting, design, implementation, ongoing evaluation, and revision.

Equality

Workforce diversity is a fact of life in most workplaces. Gender, age, experience, ethnicity, race, ability, etc. must be considered and addressed throughout workplace development. Plans should include ways to identify and remove systemic barriers to full participation in the workplace. Program materials and curriculum must be culturally sensitive. We must also ensure that our own actions as planners do not create or maintain barriers to any groups or individual people.

Respect

Planning and any resulting activities must respect all people involved. This means avoiding deficiency-laden words, such as illiterate, low level, lack, etc. It means avoiding situations that demean people or threaten their security (such as betraying confidences), and that cause anxiety (such as mandatory standardized testing). We must make sure that participation in needs assessments and programs is voluntary, and that results are confidential.

Inspiration

Many employees have not taken a course for a long time. They might be afraid of going for training or education. Any messages about such opportunities to learn must inspire people's interest and appeal to their personal goals. Planning committee members, as ambassadors for their workplace programs, should be able to inspire curiosity, enthusiasm, and trust from their co-workers.

Needs orientation

All elements of a workplace development initiative must be based clearly on needs that have been identified by all interest groups. An effective needs assessment is essential for this to happen.

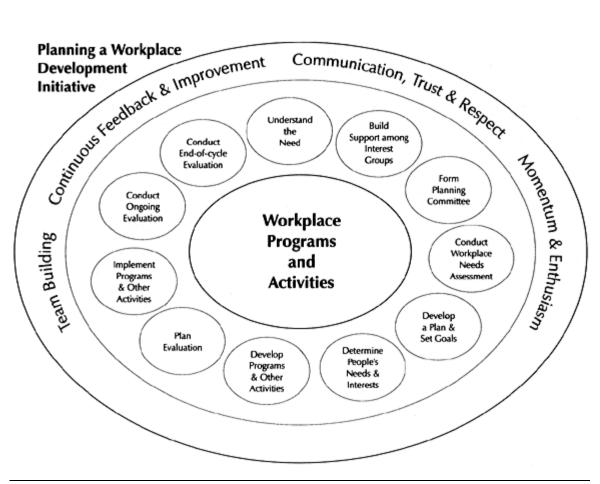
Goal orientation

Workplace development must have clear, measurable goals that respond to the needs of all interest groups. Clear goals will establish a target for effective strategies. One of those strategies should include ongoing evaluation to make sure that your initiative is on track, as well as an end-of-cycle evaluation that documents both expected and unexpected outcomes.

Principles in the real world

Carrying out collaborative workplace development can be complicated and sometimes contentious. There are some cautions to keep in mind.

- Companies are in the business of making money.
 Therefore, they will want to see a return on any investment in workplace development. Employees, on the other hand, want to see direct benefit to themselves, whether it be employment security or opportunities, better pay, or being able to get more involved in activities outside of work.
- Workplace reorganization (including total quality initiatives) is not always successful. It may not value or empower workers. Often, they are expected to do more with less. Some could be laid off. Employees might have no more real influence over their own job activities than they did before.
- Many workplaces are still hierarchical, with decisions coming from the top down. When company policies or practices support this kind of decision making, asking people to switch to a more collaborative mode to plan a workplace development initiative might result in confusion, resistance, or backlash.



from Workplace Education: A Planning & Information Seminar 1992 ABC CANADA

What does this mean for workplace development? The realities of a workplace (its culture) can be quite different from its stated policies or public face. Trying to do something that goes against a workplace culture or tradition can result in more damage than good. We have to be cautious when introducing an initiative for which there may be little or no support or organizational readiness. That means that we have to do our homework through effective needs assessment. It means careful negotiation among all interest groups to make sure that everyone's needs will be met, and that those without power will be secure.

Finally, in being true to our own principles, we must decide how much we can compromise, and at what point we might need to withdraw from involvement. This will be a personal choice.

*

The planning cycle

Note: The planning cycle is illustrated in the diagram on the previous page

This is the big picture of collaborative planning. We want to make it clear that meeting workplace development needs is a complex and often messy business. Therefore, although we present the steps of the planning cycle in an orderly manner here, there may actually be a lot of back and forth among steps. Furthermore, you will probably modify those parts of the process that are not working well.

Understand the need

The steps

Organizations often have to adjust to change as a result of the following or similar situations.

- Management style shifts from the traditional to the more participatory. Employees are expected to do more reading, writing, math, and problem-solving. They have to work in teams.
- An accident or the inability to promote an employee points out a problem. Union leaders and management might look for the causes of the problem in the policies and practices of education and training, employment equity, suitability of equipment, or the way work is done.
- Technological change requires new math or computer skills of the workforce.
- Increasing workforce diversity highlights barriers that keep people from reaching their full potential.
- New laws or industry guidelines require compliance, exposing upgrading needs.

Build support among interest groups In the beginning, within the union leadership or senior management, there are often only a few ardent supporters for a workplace development initiative. Unfortunately, an initiative is unlikely to succeed unless key people are involved from the outset.

One way to handle the situation is to bring the key parties together. Once they come to a common understanding of the issue and agree to do something about it, they can develop an approach and terms of reference that all parties can agree to. Now you can assess the degree of organizational readiness for a workplace initiative.

Form a planning committee

Once key interest groups support the notion of a workplace development initiative, put together a planning committee. The committee should have a representative mix of interest groups (managers. supervisors, workers,

union reps, etc.). It should also reflect workplace diversity (a mix of experience, gender, ethnicity, race, age, etc.).

Committee members might not be used to working together. Use team-building activities to help the committee become a working unit. They also have to learn about developing workplace development initiatives — the ground rules, principles, and techniques — and what is expected of them individually and as a group.

Design and conduct a workplace needs assessment (WNA) The committee will plan a WNA, usually in consultation with an education partner experienced in needs assessment. The committee will determine what information to collect, from whom, and how to get it. Members will decide how to explain the WNA to the workforce and how to get a sample of the workforce to participate. Normally, your education partner will carry out the WNA.

Note: This is not an assessment of individual people or their skill levels. but an attempt to assess the needs of the entire organization.

Plan the workforce development initiative

Following the WNA, the committee should respond to the identified needs with a plan. This will entail setting goals and developing strategies to meet the goals. The strategies will be carried out using specific activities) such as courses or special training or rewriting operating procedures. Some strategies will be short term) while others will likely take a long time to complete.

You will likely carry out your plan in phases. Start small, with activities that are most likely to be successful. Let the workforce know about the successes.

During this phase, you will also find education partners who can best meet your education and development requirements.

Determine employees' needs and interests for programs Once you know what programs you want to offer in the first phase, give people an opportunity to sign up for them. Your education partner will help assess employees' individual needs and abilities confidentially.

Develop programs and noneducational activities Once you know who will be participating, begin to plan programs to suit them. For each program, you'll have to decide how to balance participants' time between working by themselves and working on common themes as a group. It is important to develop programs in consultation with participants and to be able to meet new needs as

they come up. Instructors must work closely with course participants to keep on track in meeting their needs.

Non-education activities might include:

- Establishing a committee to look at improving communications.
- Developing a clear language policy and rewriting important workplace documents in clear language.
- Removing systemic barriers (such as discriminatory recruiting practices) through policy and changes in practice.

Plan the evaluation

Evaluation will determine progress in meeting goals, and it will help you discover weaknesses in programs and activities so that you can plan improvements. Evaluation should be an integral part of any workplace development initiative. It should be planned and put into place by the planning committee or an evaluation sub-committee involving all interest groups.

Evaluation activities must focus on what is important to key interest groups. We determine that by answering this question:

Who wants **what** information, and **why?** Some activities help you monitor the components of your initiative to make sure they are on track. All interest groups can provide feedback on outcomes and needed improvements throughout the life of the initiative.

Put the plan into effect

Implement the various programs and activities.

Conduct on-going evaluation

Monitor progress to ensure that everything is on track. This is usually done by the planning committee or an evaluation sub-committee.

Conduct end-ofcycle evaluation In addition, evaluate your programs at the end of a cycle or phase to determine both the expected and unexpected outcomes. Summarize the strengths and weaknesses of your initiative. Incorporate findings into future plans for this and other initiatives.



In conclusion

Some who have adopted collaborative methods in their workplace initiatives are now applying collaborative principles and procedures to their relationships with workplace educators. They are creating informal networks of like-minded practitioners to share experiences, resources, and ideas; provide moral support; and create a constituency for new and improved forms of workplace education.

They are thereby practicing what they preach: investing in their own ongoing learning and continuous improvement — and doing it through collaborative decision making.

We welcome ideas, inquiries, and feedback about moving our field in this new direction.

Suggested Readings

- AN ANNOTATED SELECT BIBLIOGRAPHY

The following documents provide food for thought for those interested in collaborative methods of workplace development. Most of them make strong arguments for non-traditional approaches to workplace education. Some have a more traditional perspective, but suggest a need for new ways of defining goals and measuring outcomes. Several, going beyond theory, describe practical steps that workplace educators can take to create new, collaborative programs.

Draper, I.A. 1991. "Understanding Values in Workplace Education" in *Basic Skills for the Workplace*, edited by M.C. Taylor, G.R. Lewe, & I.A. Draper, 85-106. Culture Concepts, Toronto. Summarizes five philosophies of adult education (liberal, behaviourist, progressive, humanist, and radical, and challenges adult educators to clarify their own philosophies — individually and in dialogue with others. With a clear set of principles, we can avoid being pushed into forms of practice that violate our personal principles.

Evaluation Research. November 1992. *Workplace Education: Voices from the Field*. Proceedings of National Workplace Literacy Program Project Directors Conference. September 1991. Washington: Division of Adult Education and Literacy, U.S. Department of Education. Representatives of 39 U.S. federally funded workplace education programs give feedback on such key components as partnership building, curriculum development, staff development, assessment, evaluation, and recruitment. This was a rare opportunity for practitioners to speak directly to federal policy makers.

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Hull, G. Hearing Other Voices: A Critical Assessment of Popular Views on Literacy and Work. Berkeley, CA: National Center for Research in Vocational Education. Argues that, if workplace education is to prepare workers to take initiative, solve problems, and work in teams on the job, it needs to involve participants in shaping program goals and running the education program itself.

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Johnston, Wendy E. 1993. *Workplace/Workforce Literacy: Trends and Issues in 1993*. Presentation at Workplace/Workforce Literacy: A Conference, held in Mississauga, Ontario, February 12-13, 1993. Questions many assumptions underlying current workplace education efforts, including the mismatch between worker abilities and job demands and literacy's impact on competitiveness. Challenges adult educators to rethink whether and how to

get involved in workplace education, to avoid well-intentioned but misguided efforts.

Jurmo, P. April 1994. "Education in the New Workplace" in *Literacy at Work*, 9:4. Describes a new, "collaborative" perspective on workplace education in the U.S. Collaborative programs involve a broader range of stakeholders in setting goals and running the program.

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Weiner, Nan. 1993. Employment Equity: Making It Work, 1:1-20. Butterworths Canada. The introduction to this book is a good overview of the definition, history, and need for employment equity in a Canadian context. It also looks at what implementing employment equity involves, with examples of several interesting case studies.

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