

EMBEDDING

Literacy & Essential Skills

Lessons from our research

Decoda
LITERACY SOLUTIONS

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by
Tracy Defoe
&
Diana Twiss

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Embedding Literacy and Essential Skills — Lessons from our research

Author(s): Tracy Defoe, Diana Twiss
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Copy Editor: Joan Acosta
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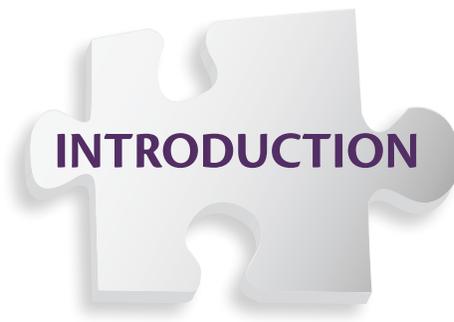
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Diana Twiss
Decoda Literacy Solutions

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About this project

Embedding Literacy and Essential Skills — Lessons from our research is an action-research project borne in part out of the disappointment of setting up workplace programs, running them for a few years and then watching them end as soon as the funding ended. It also came from the frustration of those instances where we couldn't even get a program started. Despite the need for training and increasing the skills of workers, a strong commitment from management to support a program, and buy-in from workers, too often one of the results of a needs assessment is the realization that because of the structure of the workplace, the operational requirements and the working day, it is impossible to mount a workplace program. What then?

We decided we needed to find a new strategy, one with a potentially sustainable approach that would seamlessly fit into the rhythms of the work environment. At the heart of this idea are the following facts:

- ▶ Everyone in the workplace is learning all the time.
- ▶ You rarely have enough time or money to really support the learners who commit to a learning program.
- ▶ CEOs and managers are working on problems that can often be addressed and improved by examining the literacy and essential skills practices in the workplace.

By placing workplace learning professionals into three different working environments, we explored the idea of embedding. We looked at what it would take to get people in a workplace environment to consider how a focus on literacy and essential skills could help them do their jobs more safely, more productively and with greater joy.

We thought that rather than just targeting workers with lower literacy skills, we would look at the entire working environment and find places where people were getting stuck, transitions were taking place or things were going wrong. What was going on in these moments? And to what extent did people's reading, writing, math, and communication skills have an effect on what was taking place?

In asking these simple questions, we learned several things. Most importantly, we learned that most difficulties experienced or challenges expressed in these work environments came from some element of communication, mostly interactions with text. We noticed that when people think about literacy and essential skills, they often tend to focus on reading comprehension. The thinking is that if someone doesn't understand something or misunderstands it, the reason must be due to poor reading skills. The other thing we learned was that, because of the often exclusive focus on deficits in reading ability, people were failing to notice that material developed for the workplace is often poorly written and written for the wrong audience. For example, the reason workers didn't understand a company policy was due largely to the fact that it was written in difficult legal language. And because of this, many of the workers wouldn't or couldn't read it in its entirety.

We also learned that often when things were going wrong, or appeared to be going wrong, and no one could agree on the way that something was supposed to be done, it was because it had never been written down. And it had not been written down because those doing the work were not confident in their writing ability, and those in charge didn't know this was the reason for inconsistency of practice. When we got people to start exploring solutions to these issues, we learned that most people in a workplace think skills training is for other workers, not for them.

What we managed to do in our project was to get people thinking about their work, what they had to do, and to explore the ways that literacy skills were having an impact on processes or tasks. We asked people to think about different or better ways to do the task and sometimes to even question if it actually needed to be done at all. What we witnessed was the beginning of shifts in cultures and in systems as awareness about literacy and essential skills grew.

Our story and the lessons

This booklet is in part a narrative of the work our research team did over three years to find ways to embed literacy and essential skills into three different working environments. It is also a how-to resource for literacy and essential skills practitioners, human resource professionals, and people who are trying to make sense of the modern world of work. Throughout this project we had a variety of experiences and learned important lessons.

Our mission is to help you understand and imagine ways to embed literacy in the workplace. It is not to teach you how to get involved in workplace learning. Our lessons are not a substitute for a grounding in organizational needs assessment, working with steering committees or developing learning materials based on real work. Additionally, we are not aiming to help you with teaching methods. Our lessons are specifically about embedding literacy and essential skills in a work environment by the people who work there.

Although our research was in specific workplaces during a particular period (October 2009 – September 2012), we know that some of what worked for us — and what didn't — will apply to your situation. Our guidance is mostly through example, since the how-to is more descriptive than prescriptive. Workplaces are complex and people are busy. Start where you are and do what you can. We hope our experiences, as outlined here, raise questions, offer possibilities and confirm your hunches about ways to embed literacy and essential skills in your workplace.

What is Literacy and Essential Skills?

Literacy and Essential Skills are needed for work, learning and life. They are the foundation for learning all other skills.

Literacy includes the following skills:

- Reading
- Writing
- Document Use
- Numeracy
- Computer Use
- Thinking
- Oral Communication
- Working with Others
- Continuous Learning

These skills are called Essential Skills when applied in the workplace and they are used in nearly every job and at different levels of complexity. They provide the foundation for learning all other skills and enable people to evolve with their jobs and adapt to workplace change.

Source: <http://www.hrsdc.gc.ca/eng/workplaceskills/LES/definitions/definitions.shtml>

What do we mean by embedding literacy and essential skills?

For many literacy practitioners, the idea of embedding literacy is a familiar concept. Literacy practitioners often bring people together around a common purpose like learning about digital cameras or family game nights and integrate literacy learning into these activities. Many community groups organized by literacy coordinators have taken up the challenge of creating community gardens and community kitchens with the same goal of embedding literacy skills into these activities and engaging people in learning.

In our literature review we discovered that embedding means different things to different groups, and even educators can't decide upon a common practice. In the workplace, embedding literacy and essential skills is generally thought about as a practice applied to workplace specific training. We considered combining workplace content in literacy or essential skills training as a starting point, integrating the spheres of work and learning. But we wanted to go further than that. We wanted to find ways of making literacy skills an integral part of the workplace so that they are considered part of every situation, not only in training situations, where the literature

told us the integration of literacy skills into work-related content is the dominant embedding educational practice. Training stops and starts and often depends on intervention outside everyday work life. We wanted to have an impact on the taken-for-granted elements of work culture. Once in the normal environment of a work culture, learning and practicing literacy skills could be sustained. Though we started with looking at the opportunities that existed around training in our research sectors, we quickly moved to other more pressing opportunities raised by the workers and managers themselves.

Our intention with embedding literacy and essential skills was to grow both an awareness of them and some capacity to nurture them. We wanted to see if we could influence and coach people so that literacy and essential skills come out of the background and take a place in the forefront of people's minds.

How did we do this?

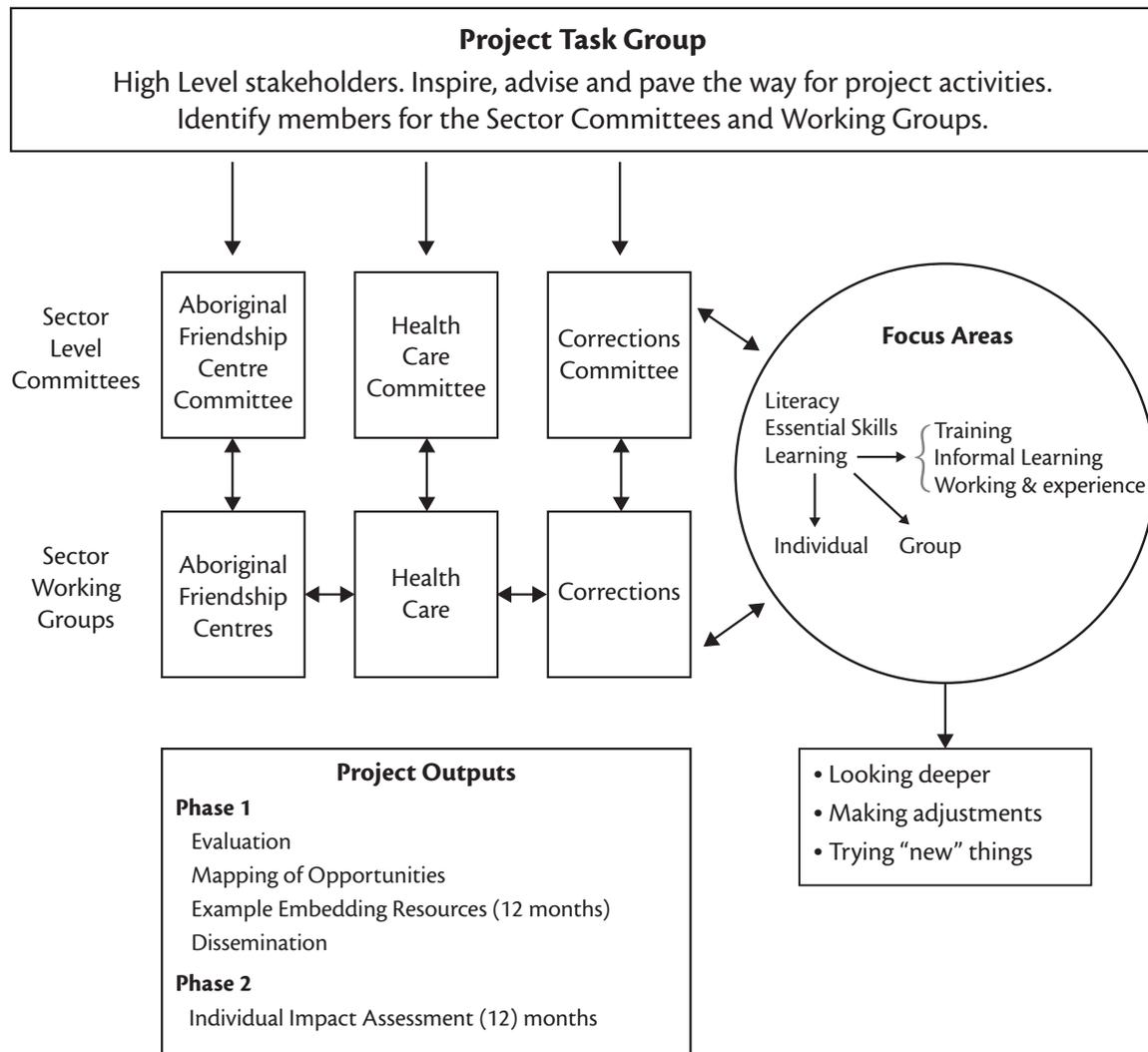
Working with a variety of government partners and colleagues with connections, we selected three project partners interested in having us explore the use of literacy and essential skills in their work places. The three sectors — healthcare, corrections and aboriginal service organizations — were chosen because the client bases and entry level workers tended to have literacy challenges. High-level stakeholders and lead people from each sector were contacted and invited to be part of the project task group along with senior managers from provincial ministries.

Shortly after the project task group was established, sector specialists were hired for the project. In two of the sectors, these specialists were literacy practitioners and educators who were from outside of the sector. In one of the sectors, the sector specialists were from that work environment. The sector specialists were the team of researchers who worked closely within each sector, explored embedding opportunities, gathered and analyzed data and wrote research reports for the project.

Initially, each sector had two sets of sector committees participating in the project: a steering committee made up of senior managers, supervisors and other high level staff, and a working group. The working groups were recruited by the sector specialists under the guidance of the steering committees. The working groups can best be described as teams of on-the-ground workers who wanted to be part of the research and to identify ways and explore actions to embed literacy and essential skills in their respective working environments. The steering committees and working groups worked on the project in a voluntary capacity. Only one sector maintained the two committees through the entire project, and in fact that sector created two levels of steering committees. In the other sectors, the steering and working group committees eventually melded into one.

In addition to conducting research for the project, the role of the sector specialists was to provide consistent momentum to the project. They organized meetings, made numerous follow-up phone calls, took notes, created surveys, interviewed groups, analyzed data, wrote observations, drew conclusions, implemented actions, developed materials and provided training. They continuously explored ways to weave literacy and essential skills into the work that people were dealing with on a daily basis.

Supporting the research project was a senior advisor who guided the research questions and troubleshooted the action research process, and a project coordinator/manager who made sure deadlines were met and the vision was maintained. These two people worked closely with the sector specialists, project task group members and steering committee members.



We developed the above chart early in the project as a visual description and an easy way to communicate our intentions and process. Identified at the outset as action research, we had the obligation to examine our approaches and to make changes, as needed, along the way.

Our general approach initially was to bring people together and talk about their workplace practices. Once we had a sense of these practices and where literacy and essential skills were being used, we could explore the pressure points — where things were going wrong, where there were difficulties, or where work practices could be strengthened.

Glossary of Terms

Term	Description	
Project Task Group	A group of high-level stakeholders consisting of provincial partners and senior managers and directors from different sectors. Its role was to pave the way for the project by inspiring and directing senior staff in the sectors.	
Sector Committees	Steering Committee	Initially each sector had a steering committee, consisting of people at the workplace who have decision-making powers. Its role was to provide guidance for the project at the sector level, and like the project task group, to pave the way for actions. In two sectors, the steering committee and working group became one.
	Working group	A group of on-the-ground workers who volunteered to be part of the project or who were identified by steering committee members as being influential people in the workplace and, therefore, necessary participants.
Sector specialists	Researchers, literacy practitioners and educators hired to work with sector committees in each of three sectors to explore embedding opportunities, conduct the research and write the research reports.	



Work Culture Style Icons

Differences in the workplace cultures helped us learn about what was possible and about ways to best proceed. We use the symbols of a pyramid, a set of joined vertical bars and a circle to represent the cultures and management styles of these workplaces and to identify examples in the booklet. The fourth image, arrows entering and originating from a circle, represents our research group structure and is used for stories about that work and our reflections.

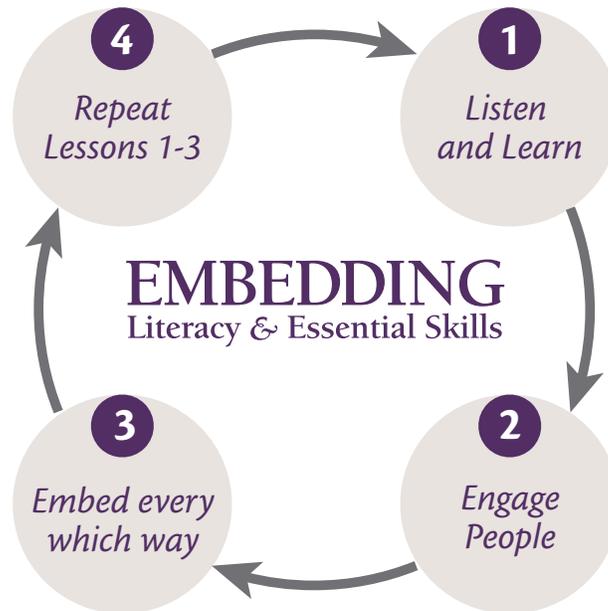
<p>The structured workplace</p> <ul style="list-style-type: none"> • Top down decision-making and management • Clear chain of command • Policies and procedures for everything 	
<p>The workplace dominated by specialties</p> <ul style="list-style-type: none"> • Many departments or disciplines with technical experts who use specific language and have distinct priorities • Vertical reporting relationships and linear reporting structure • Few opportunities for collaboration 	
<p>The collaborative workplace</p> <ul style="list-style-type: none"> • Some levels and groups, but overall flat management structure • Consultative decision-making 	
<p>The research team</p> <ul style="list-style-type: none"> • Group of researchers working mostly outside of the workplace group • Meet to reflect, write and share the research experiences 	

Lessons from our Research

What follows is our attempt at sharing selected stories to serve as examples from our research experiences. We share this in the hope that you, the reader, might make your own forays into embedding literacy and essential skills into a workplace culture, forewarned and forearmed with the lessons we learned.

Much as we reduced the complexities of workplace culture into geometric icons to provide some consistent context to the stories, we present four deceptively simple lessons.

The lessons are sequenced one to four in a development circle. Naturally, in the way of circles and development, they are meant to be iterative and endless. In fact, as you can see in the diagram on the next page, Lesson Four asks us to repeat the cycle.



We acknowledge that the diagram shows the actions as sequential when in our experience, you need to keep listening and engaging people while trying to embed every which way you can. So while we caution you to be skeptical about two dimensional representations of three dimensional experiences, we wanted to show the lessons in a cycle on the page. The pause in the quadrant for Lesson Four: Repeat lessons one to three is the place and time to evaluate, to get back on track and to begin the cycle again.

Looking back, we realize that each workplace in the research project was unique, and yet they all had many common elements. The workplaces you might find yourself interested in may be more complex, or perhaps easier to figure out than ours were. Most likely you will find a blend of the top-down pyramid structures, departments of expertise that are disconnected from others and collaborating peers. Listen and learn from our examples. Use what fits. Find allies and look for opportunities to make change through embedding.



Listen and Learn

Is this first lesson too obvious? Listen and learn? We don't think so.

Even if you are familiar with a workplace, we recommend that you start by talking, interviewing people and writing down your findings for discussion. Do this even if you work there yourself. To describe the current view of literacy and essential skills, you have to ask questions, look at many kinds of documents and listen to and observe many interactions. You will have to listen to your inner voice and reflect on what you hear.

The example below highlights the ripples of change that occur in a workplace as a result of a new understanding of literacy by the people who make workplace decisions. We asked how literacy and essential skills figured in the way a sector went about its work with clients. Would they be interested in being part of our action research project to look a little deeper into that question? A light bulb went on.



Does simply raising the question about literacy lead to changes?

Our project planning started almost two years before the research was funded. A lot happened in those two years.

We were in contact with one of the research sites off and on over those two planning years. Just raising the topic of literacy in relation to the workforce and clients changed the thinking of some key people with influence at that site. With literacy and essential skills on their radar, they started asking about the fit between training and the needs of clients. They made strategic decisions to include literacy in their plans for communication, training and in work processes from the time we started talking with them about the importance of literacy. When we went back to start the research, we found that the organization's views on literacy had changed from what we remembered. What did we do, and could we repeat that elsewhere? So we tried to document how this happened.

Understanding the current situation of literacy and essential skills in the culture of a workplace

In our research report, we called the early process of understanding the current workplace situation “capturing the back story.” We were trying to find and describe a starting place of literacy in the workplace before our action research began. You might want to call this early process something like “Understanding the current state of literacy and essential skills.” Think of this as reading the workplace by identifying the people with influence, the power dynamics and the constraints on starting your embedding effort.

As noted earlier, concept discussions and preliminary dialogue with partners began on our project more than two years before the start date. Once people of influence started to understand the importance of literacy and the ideas of embedding, they began to make changes.

If you come to the situation as an adult literacy practitioner from outside the workplace, then you may want to document how the workplace came to be working with you as part of assessing needs and possibilities. If on the other hand you work as an employee — maybe as a human resources specialist, a health and safety advocate or a quality improvement leader — asking questions and documenting the current situation is even more important. You will want to write down the story of what the current practices are before you start, so that you don’t miss part of the picture affecting literacy and essential skills.

Developing tools to use in the workplace

When you are part of the work culture, the whole situation can be difficult to see. Questions, like the ones we used below, may help you see the current situation and the background factors that influence it. These questions can also uncover other information, like employee survey responses or planned changes that colour the way you proceed. Even when you are not writing about the current situation in a formal way, you are constructing a narrative to make a case for participation and support. Key points in that narrative include the ways people use literacy and essential skills in their work today, how they did so in the past and how they might be used in the future. Answers to questions like these can help detail a fuller and clearer picture.

This set of questions is one of the tools we developed to help us discover and document the background that could lead to actions and initiatives around literacy and essential skills in workplaces. We focused on collecting information about the organization and the people regarding embedding literacy and essential skills in aspects of their work culture. These questions also helped us get the conversation about literacy and essential skills started, and helped us find a common language for talking about literacy and essential skills.

TOOL NUMBER ONE

Questions to capture the current state of literacy and essential skills in the workplace:

- ▶ What approaches, initiatives or training were in place BEFORE an embedding intervention was on the horizon in terms of literacy and essential skills in the work environment? For whom? By whom?
- ▶ What did people know and understand about the demands and needs for literacy and essential skills within the workplace? What kinds of work or which jobs?
- ▶ When did people in this workplace first hear about embedding literacy and essential skills? From whom?
- ▶ Why did they agree to get involved? Do they have a specific issue or problem to address?
- ▶ Once the embedding idea was explained, did the workplace leaders or anyone else hold meetings, make plans, or change anything to put the idea of embedding to work in the sector? In what ways, and with what results?
- ▶ In what other ways is the workplace different now regarding its thinking about embedding literacy and essential skills than when people first heard of the concept?
- ▶ Is there an employee survey, client feedback or other existing data that overlaps with your interest in literacy that you can draw upon for background or use to establish a starting point?
- ▶ What other changes are underway that come to bear on embedding literacy and essentials skills?

In the unlikely event that you are the first person to have considered embedding literacy and essential skills in aspects of workplace life, and you haven't told anyone about it yet, so no ripples are moving beyond your knowledge and control, you still shouldn't skip this step. Write down, for your own benefit, how you first heard of the concept, what you connected it with and any ways you initially saw it could fit and benefit individuals and the workplace. Was your insight prodded by a change you saw on the horizon? Was something said in your client feedback loop or on an employee survey that made the association in your mind? If there are many factors at play and many players involved, the lesson we learned is to listen carefully, ask questions and make notes. In this way you can capture the story from the beginning.

More examples from our experiences with listen and learn

Here are three examples, one from each of our workplaces and another set of questions to illustrate Lesson One: Listen and Learn.

These examples point to the importance of working in collaboration with the leaders and other players in a workplace such as staff, volunteers and maybe even clients. Ultimately, you want these leaders to spend their time, energy, and budget toward embedding literacy and essential skills. The examples also speak to relationships and the value of long-term activities in embedding. Finally, the examples underscore that in applying Lesson One, we are all learners.

EXAMPLE 1 — Listen and Learn



Language is important — listen for terminology

In our sector dominated by departments of experts, there were three separate employers and more than one union. With different expertise and many specialized departments, each ultimately served the same clients and each had front-line workers. The back story found that many aspects of learning, communication, teamwork and training in this workplace were already documented with data from employee Health and Safety Culture surveys. We were able to agree that some of this data was a starting snapshot of the workplace on the very points we hoped to address.

The complexity of the relationships in this multi-employer environment kept people from working together. They recognized this systemic barrier to improvement and had several cross-functional team initiatives underway inside one or another of the employing organizations. We quickly learned that our literacy and essential skills research project marked the first time that all three employer organizations were at the same table, face-to-face and working together. It was a clear indication of a vertically organized workplace situation.

Why did they come together to talk about ways to embed literacy? People saw an opportunity to further their goals. They came together to improve the quality of their work. If literacy and essential skills were a route to better communication, better teamwork and learning, and ultimately better quality of service and better safety, they were on board. Our literacy and essential skills initiative went from “research” to “quality improvement” when we agreed on what to call things at the earliest meetings. We had to be flexible about this terminology. Quality improvement was welcome; research was a potential problem because no one wanted to be revealed to be lacking in any way. Quality can always be improved; so that wording was seen as positive and supportive.

Listen for the words people use to talk about each other, their work and areas of expertise. If people are using different words to mean the same thing, be flexible. If the meanings differ, you have a teachable moment to clarify, and listen, together. Should you find yourself with people who have never been together in the same room, who haven't previously tried to work together, be patient as they also listen and learn.

EXAMPLE 2 — Listen and Learn



Leaders will sometimes embrace a good idea

The sector specialists weren't the only ones listening, learning and connecting the dots to see how putting literacy and essential skills into the picture could be powerful. When literacy is a part of the solution, and there are important problems to be addressed, leaders connect the dots for themselves.

In our most structured research site, some of our research team members had previously worked there as consultants. This was the reason that we were able to get into the workplace to pitch the idea of embedding literacy. And right from the pitch, the ideas sparked, the dots connected and before we had a project, things were rolling.

We didn't get to the tip of the organizational pyramid, but we got up high enough that someone responsible for teaching and learning throughout the organization saw that they needed a strategic shift. The key people were called together to explore and lay down that strategy — an approach to integrating literacy and essential skills foundations and instructional methods into the training that was going to go on anyway. They developed new questions to ask. They had a strategy and started re-evaluating and revising training and other communication practices before we started. And because they had the structure for it, the rollout happened fairly quickly.



EXAMPLE 3 — Listen and Learn



Organizations often have long memories

In the collaborative workplace we studied, many people measured their employment in decades. The organization has a formal policy of promoting from within and greatly values long-term relationships with individuals. It believes in the strength of knowledge and commitment that grows over time.

What does change mean in a workplace with a long memory?

In a collaborative and fairly flat organization, change doesn't come through decree. People gather to discuss the goals and directions of the organization. They accept the need to change and the ways to approach change in dialogue.

In this organization, the knowledge of literacy and essential skills grew over time. Adopting different communication and training practices became part of the path they were walking together. Not a forced march, not a policy change, but an evolution of good practice. Interestingly, though perhaps not unexpectedly, leadership still has influence.

When the people in an organization have a long memory of their work, no matter what the structure of that organization, it is best to honour and value the good work and efforts that came before. Then you can look to the future, and with the support of leaders, find the way forward to the next evolution of good work.

Another tool to make embedding visible

The examples of Lesson One: Listen and Learn are based on our experiences getting started with an organization. Embedding is an abstract concept and can be difficult to grasp, so in order to help people understand embedding literacy and essential skills, we tried to find concrete and visible examples in work life. This played out in different ways across our sectors.

We described in detail what people do in their work that includes or can be understood through literacy and essential skills. We also wrote down and charted what people said or told us about their thinking around literacy and essential skills in their workplace. These descriptions make embedding possible to see, describe and discuss; they also help locate the opportunities for embedding. The following set of questions aims to capture behaviours, opinions and thinking so everyone involved can consider them when looking for opportunities to embed.

Questions about literacy and essential skills in everyday workplace practice or culture

This next set of questions is the second tool we developed to explore opportunities for embedding. It is about practices and behaviours in the workplace. It is important to document normal practices early and capture the thinking behind these practices so you will know what changes develop concerning literacy and essential skills in the work environment.

Change will be incremental and it may be slow, especially at first.

Ask, observe and otherwise determine answers to these questions from every possible perspective. The answers could reflect multiple or even contradictory perspectives. The list of questions is not exhaustive. Add topics or questions as you all become aware of behaviours or examples of literacy and essential skills being used in everyday workplace practice.

At the very least, before you rush in to change documents or redesign training, you will want to be sure you have a grasp of what is happening with literacy and essential skills in the workplace. Pay attention and document what you observe. Ask people to explain. The questions here are simple:

- ▶ What do people do?
- ▶ What do they say they do?
- ▶ What do they tell us they are thinking about?

The questions in this tool are not numbered or sequenced. Use what fits your situation to illuminate the opportunities available, and in the process draw the right people into discussing and committing to giving embedding a try. Clarifying the current situation through this tool may help your initiative find the common ground to move forward.

TOOL NUMBER TWO

Questions to capture the current state of literacy and essential skills in the workplace:

- ▶ Are literacy and essential skills taken into account in training and orientation for new hires or in screening for hire? How?
- ▶ Are literacy and essential skills taken into account in on-the-job training and orientation for people who interact with front line clients? How?
- ▶ In everyday front-line interactions between employees and clients, or between employees and supervisors, are literacy and essential skills accounted for in the ways people interact? How? For example, do they check comprehension, try alternative ways to communicate, or otherwise try to make meaningful connection through literacy and essential skills?

- When a new protocol, policy or work practice is formulated or written, are the literacy and essential skills of the reader taken into account? How?
- When a new protocol or work practice is communicated, are literacy and essential skills taken into account? How?
- When a new protocol or work practice is implemented or evaluated, are literacy and essential skills taken into account? How?
- ▶ When peer-to-peer learning, coaching or communication takes place, are literacy and essential skills taken into account? What do people assume happens in peer interactions with literacy and essential skills?
- ▶ What are the areas to focus on to make changes that would significantly impact literacy and essential skills? What specific situations or interactions are in those areas?

Our working environments included client groups with documented low literacy and essential skills challenges, and some workers who dealt with the general public at the front-line. In our questions we asked about front-line interactions to get a snapshot of how those front-line workers were trained and supported and if they were expected to be aware of literacy and essential skills in their client group. As a workplace project, we were mostly concerned with the workers themselves. Asking about clients however helped everyone involved to see the outcomes of better literacy practices. For example, would making the front-line workers job easier and more error-free, yield a better, smoother, faster client experience?

At this stage, ask questions to find the places where the priorities and problems of the workplace overlap with the potential to embed literacy and essential skills in the workplace.

We are just getting started.

What do you do with what you learn?

Asking questions and listening invites participation. It engages people. So even before you have answers, and maybe while you seek help in forming questions, you have started on the process of engaging people in embedding literacy and essential skills in their workplace. In this way acting on our lessons learned is not sequential. You don't finish one and start the next, but work toward a process of embedding that will stick.

What do you do with the answers to your questions?

- 1 Keep notes.** People are telling you how things work and where there might be opportunities to embed literacy and essential skills. Writing it down will help you keep track and see the overall picture more clearly.
- 2 Sort the answers into categories.** Some of the questions ask about how literacy and essential skills are taken into account in planning or doing an important function. Some of the questions ask about the way training takes place.

Literacy, essential skills and training are an easy fit. A mismatch between the worker and the training level, or style or timing can be relatively easy to identify and fix, and the results are quickly apparent. In short order you can win people over when you can show ways to improve training.

3 Share the answers with people who are guiding your embedding initiative. In our case it was our steering and working group committee members. It is important that they see the opportunities, or at least that they share and discuss the opportunities to embed.

The answers to these and other questions previously listed give you and your group a way to look at the place of literacy and essential skills in workplace culture.

If you are an outsider to the workplace, the answers you obtain will help you map the workplace relationships and influence terrain. The more you know about who the formal and informal decision-makers are, the better you can work out how to engage people in embedding literacy and essential skills in their workplace, to further their goals and meet their work demands.





Engage People in Finding Opportunities to Embed

Engage people to do more than give advice or provide information, especially the decision makers. We suggest you start at the top, or as high up in the workplace or organization as you can. This is especially important in the pyramid or vertically structured workplace.

Ultimately an organizational culture is the accumulated effect of patterns of behaviour by individuals. Change comes from individuals, so engagement is needed to bring the change focus to literacy. You will do well with active participation from decision makers and leaders right through the development cycle. Engaged leaders can also be very influential learners once they are on board, seeing the workplace through a literacy and essential skills lens and making changes through embedding.

Our research design was based upon our research team leaders' experiences in workplace learning. People assume that front-line workers get the most from workplace basic skills training and that supervisors get the most from communication or intercultural initiatives. We have repeatedly heard that the people who learned the most about the value of literacy and essential skills from the planning and discussions about basic skills training were the owners, directors and managers. This is usually an unintended outcome. What if we planned on it?

We invited directors and managers – the decision-makers – to join us in learning about embedding. We invited them onto steering committees and working groups to set up levels of advice in each sector. We wanted to involve them and get them thinking.

We needed their help to find focus in their work world. What was worth doing? Where? The different work environments took different approaches as summarized below. Remember that our work culture style icons of a pyramid, vertical bars and a circle are intended to telegraph the simplest version of the workplace culture structures.



The workplace dominated by experts and specialties kept adding people to the steering committee. Many people needed to be included or their special perspective would be lost. Those people each wanted to bring one of their key people to the table too, so we created a second level steering committee in that workplace. It took a total of about 30 people at those two levels of advice and action to satisfy the need to get the right people included. If that happens to you, you know you have some vertically organized areas of expertise, and you have to be flexible about what steps need to be taken to engage people. As you can imagine, researchers in that work environment spent the most time in meetings. They also had the most trouble bringing people back to the table over and over again with such a distributed support network and no clear champion or owner.



The collaborative style workplace took a long time to get going. The researchers were part of that workplace and though they did some thinking on their own, they waited to introduce the idea of embedding. They chose to add it to the agenda of other meetings where the right people would be together. In this way they drew in people with roles at the national level, provincial directors, communication and training group members, seniors, youth and client group representatives. Once they had people engaged, they were committed and prepared to move forward together.



Engaging the right people in the hierarchical structured workplace was relatively straightforward. We found the person whose job title and role was the most closely aligned with literacy and essential skills and then worked through that person for everything. This champion invited others to the embedding working group and kept literacy and essential skills on the agenda across other initiatives as well.

How does this apply to your situation? Be flexible and responsive about engaging people. There is no one best way to draw people in and get them thinking about how a focus on literacy and essential skills might be a missing piece in their workplace. Directors and managers have problems to solve and priorities to juggle. If you can help them to identify the role that literacy and essential skills plays in their priorities, they will find ways to implement these skills in their work worlds.

About holding a focus on literacy and essential skills

When problems and priorities were raised at working group meetings, solutions that were not related to literacy and essential skills were often discussed. For example, members of our working groups and steering committees shared many aspects of the work environment like workloads, contract limitations, and the challenges with rotating assignments. As researchers with no decision-making powers, these things were beyond the scope of our project. We may have been able to help workers understand contract language, but we couldn't change it. This may happen to you. Keep the focus on learning, literacy and essential skills by defining what is out of scope, or what the group does not have the power to change. Have specific action items with your steering and working committee so they stay on topic and on task.

EXAMPLE 1 – “Light bulb” moments

The following examples of engaging people, especially decision-makers at the highest levels, highlight the power of insight and understanding in what we call “light bulb” moments. We found that these insights also came to us, as action researchers who were learning along with everyone else.

The second example is a brief retelling of our one great failure to keep a partner who never fully engaged in embedding, perhaps because we didn't reach those at a high enough level to secure the engagement of real decision-makers for that organization.

Embedding literacy and essential skills in a workplace culture can, for some people, be hard to understand. So watch for those moments where it sparks in others and in you. These moments certainly led to “ah-ha” insights for our action research team members. “So this is how embedding works! The people who work here take it over!”

Here are some examples of light bulb moments from our experience.



- ▶ In our expert-driven work culture site, the researcher asked a manager about the literacy and essential skills of front-line workers. One of the things they talked about was safety notices. The researcher suggested that the client group and their family members would likely have the same challenges with the safety notices that the front-line workers did. Click, the light went on. Client services were the focus of this manager's work life and without hesitation he could see many ways forward. Suddenly his time and his budget were more available. The matching light bulb moment for our research team: find the intersections of interest to engage people, especially leaders, in embedding.

- ▶ Again in our expert-driven site, the researcher asked a union leader a question that turned the interview around. The union leader was detailing what the employer could do and should do about the learning opportunities for the front-line workers. Probing for introspection, the researcher asked what the union could do and watched as the light bulb went on. With growing enthusiasm, the union leader started to consider what her organization could do and quickly moved to an action plan where she could see her own, and her union's, place in the picture. It is critical that people in a workplace have a sense of ways they can contribute to embedding literacy and essential skills. Too often people imagine learning as the sole responsibility of a "trainer" and that unnecessarily limits the imagination of how to best tackle the situation in ways that will make a lasting impact.

EXAMPLE 2 – There is power in words

Another important thing we learned was to be careful not to give the impression that we favoured the perspective of one group over another. This is especially important if you are bringing together widely disparate groups. You don't want to ruin the trust levels you have worked hard to develop by having some people think that you are taking sides in struggles that might have nothing to do with literacy.

Every organization has power relationships and politics. Don't compromise your ability to work with everyone by adopting the perspective or the language of one group. This advice holds for the perspective of the president as much as it does for the quality manager or the union activist. Don't mistake the language of a single department for that of the whole organization. Listen and learn before you write, act and reach conclusions. We learned this the hard way.



In one of our research sites, we put out a draft of questions for interviews and surveys to try to capture the current perspective on literacy and essential skills. One group in the workplace took exception to what it saw as a set of questions that would put the group in a bad light. We thought we were looking for a baseline description, but the group felt the answers could compromise them. We knew there was a power dynamic in the group relationships and that trust levels were just starting to build. We offered to redraft the questions, and with their direction we did. A week or so later, the group pulled back from the embedding initiative altogether. They said they couldn't risk participation. For us the hard part to understand was that this group had been invited to join the research project because of its good work. The group was to be the positive example pulling the rest toward good practice. We knew that. The group knew it. Even so, when they looked at the bigger picture, they felt safer outside the project, even though withdrawing made them miss a chance to lead.

These examples from our experience show that there is nothing straightforward about the invitation to participate in embedding. Move slowly and carefully to avoid pushing embedding on a group that is not ready. Let the light bulb moments shed enough light to attract others. Remember that you are learners too, and your insights can help guide your actions as you build an embedding action team.

We also learned that while there were people at the steering and working group committees who were excited about exploring the idea of embedding literacy and essential skills, there were also some people around the table who were threatened by it. Some of the opportunities being explored meant that things had to change, and in some instances that meant more work for some. All the more reason to engage people at all levels in order to forward the goal of embedding literacy and essential skills.

Dealing with disparate groups

Engaging people might be the trickiest part of embedding. Literacy is a motherhood issue that can bring people together to support the common good. Members of our research team have seen rival companies, entire sectors, unions and management work together many times. Team members have also had experience in situations where various departments in a workplace are in conflict about areas of work. In our research situation, we didn't see the weight of the history that had kept the departments separated. They didn't trust each other, and we trusted everyone. When the one department pulled back, there were apologies from the individuals at our table who said the call to withdraw came from over their heads. We stayed in communication and kept them up to date on our activities. We tried to maintain a working relationship in the hopes that they might find a way back. Our researchers found actions that included the interests of this partner, even without them formally at the table.

The lesson from this is to proceed cautiously when dealing with disparate groups. We could have spent more time with each partner separately and found the clear boundaries of their participation before proceeding to draft anything in writing that they could take away and share in their organization. Once it is on paper, a draft can look like a plan or a position. Perhaps we could have avoided reactions to a first draft by being a little slower. We gave this partner all the changes they asked for in our draft, but still, they found the risks of working together unacceptable. Workplace projects are important and difficult partly because they take place in a high-stakes milieu of competition where engagement may carry costs that we can't foresee. We don't think you will regret moving slowly enough to keep everyone at the table and working together.

Finding opportunities to embed

Where do you find opportunities for embedding literacy and essential skills? How can you make it easier for people in the workplace to understand embedding?

Initially the working group committees identified embedding opportunities in the work environment. Once they eliminated a few ideas, the sector specialists interviewed other people at the workplace. Each team used a mapping process to visually represent opportunities and their relationship to each other, to physical locations and to goals. It was a loose and semi-structured way to list opportunities and see connections between them and other potential actions. The teams also used this process to collect typical situations and specific examples of practices that could be further explored. The collaborative workplace was comfortable with this mapping exercise; the others needed a firmer structure like a formal chart with action items and timelines.

We noted that the process used by the working groups to identify and prioritize embedding opportunities was strongly connected to their workplace structure. This is not surprising. In fact, it underlines the validity of the structure description. The common sense and natural way to do something is always an element of culture. Each working environment expressed opportunities for embedding literacy and essential skills in the way that they found valid and real. Our teams needed to be flexible and recognize that each would come to document opportunities in the ways that made the most sense to them.

When we followed the priorities and the interests of our sector committees, we were a welcome addition to their team.

Each sector working group established a framework to help them capture and express opportunities for all to see. Why use a framework? The structure of a framework helps get down to specifics. Ask how people behave when they read or when they write and you will get examples. Spend some time studying those examples for specifics, and soon the people you are talking to start to see the literacy and essential skills connections in the web of work life. And the opportunities to embed shine through.

You can use the questions below or the example worksheet format on the following pages to find a focus on literacy and essential skills in the normal life and practices at work.

From our experience, embedding opportunities are likely found in the ways people interact with:

- ▶ what is written and read.
- ▶ text, on paper, computer screens or signs.
- ▶ numbers – written, read or spoken.
- ▶ problems – identifying, solving, learning from problems through debriefing or other reflection.
- ▶ decision-making, and learning from decisions.

Tool for reviewing embedding opportunities

When you document details about embedding opportunities, take detailed notes and collect samples of documents if you can. Describe specific examples of these embedding opportunities and list all the skills that apply.

In the next few pages we offer examples of the way we used the tool to review the following:

- ▶ The ways people interact around writing and reading – the client handbook
- ▶ The ways people interact around numbers, written, read or spoken – financial statements and budgets
- ▶ The ways people interact around text on paper, computer screens or signs – caution signs
- ▶ The ways people interact around problems: identifying, solving, debriefing –tackling critically important issues
- ▶ The ways people interact around decision-making, learning from decisions – responding to constant requests

A starting point for embedding: the client handbook

We found a version of a client handbook in each of our working environments. The ways that policy and practice information flowed from the handbook text to the client, usually looping through front-line workers, was one of the first things mentioned by people when they thought about the ways people interacted around reading. Often, writing also factored into the situation.

There are several elements – and embedding opportunities – in this situation. These include:

- ▶ The text – the actual words and sentences
- ▶ The layout and design of the handbook
- ▶ The reading ability of the client
- ▶ The oral communication between the front-line employee and the client
- ▶ Visual aids and other supports to conveying meaning with less text

What did we do when we had this example brought to our attention? First, we asked to see the handbook itself. If we could talk to the authors, we did. And where we could see real interactions at the front desk, we also explored those. These opportunities were ways into the work environment.

On the following pages you will see how we used our tool to express the issues related to literacy and essentials skills that come up when people interact with the client handbook and other related embedding opportunities.

TOOL NUMBER THREE – Reviewing embedding opportunities

The ways people interact around reading

EXAMPLE: The Client Handbook is long, crowded with text and written in a legal jargon voice. Many clients and their family members talk to our front-line workers to clarify their situation even though all the answers are in the client handbook. Employees are frustrated having to answer the same questions many times during every shift.

What is happening in terms of...

Reading	Reading the handbook is difficult so people either don't read it or they don't understand what it means and how it applies to them.
Oral Communication	Conversations at the front desk are repetitive and keep employees from doing other work. Mismatch of terms for same thing. People are frustrated. Sometimes front-line workers end up reading aloud right from the handbook.
Writing	Some people take notes.
Document Use	The client handbook is hard to navigate. People seldom use the Table of Contents.
Working with others	The front-line teams say they try to share the work of explaining, but some people do much more explaining than others.
Numeracy	Some of the information in the handbook and questions asked at the counter involve money math, fees and the like.
Thinking skills	
Continuous learning	
Computer use	We don't have an on-line version, but we would like to have one in the future.

The ways people interact around numbers

EXAMPLE: Financial statements, budgets and other money-related aspects of organizational financial management: Board members are selected for their community involvement and perspective. They may not have experience and comfort with large numbers or the conventions of budgets and financial spreadsheets.

What is happening in terms of...

Reading	The financial material is sent ahead of time for review, so during the meeting there is an assumption that people have read and understood it.
Oral Communication	When the financial statements and budgets are presented by staff, there is little discussion and few questions.
Writing	
Document Use	The printed form of the spreadsheet can be difficult to navigate and understand. Small print size, large numbers and many acronyms are used.
Working with others	Peer training and training resources identified as embedding opportunity
Numeracy	There are built-in equations and relationships between numbers in the statements. There are simple and more complex calculations to understand and interpret.
Thinking skills	Important to practice problem-solving around cash flow, employee expenses, grants and what is permitted by many levels of regulations.
Continuous learning	
Computer use	

The ways people interact around documents

EXAMPLE: "Caution" signs with words and symbols are hung on the doors of rooms that require special cleaning procedures.

What is happening in terms of...

Reading	The signs are easy to read if you know what the symbols and words mean. People sometimes can't see the sign because the door is left open, covering the sign.
Oral Communication	When staff sees each other before a room clean starts, they sometimes ask about the precautions required.
Writing	Cleaners make notes for their own use.
Document Use	
Working with others	
Numeracy	
Thinking skills	Cleaners follow procedures, but they may also have to problem-solve on the fly if for example, a ladder is not readily available when they need one.
Continuous learning	
Computer use	Each room cleaned is scheduled and cleared with a code on a pager, or with a text message on a telephone.

The ways people interact around problems

EXAMPLE: There are many signs around the hospital reminding people to wash their hands. People ignore them. This is a problem.

What is happening in terms of...

Reading	There are written instructions and signs about hand hygiene throughout the facility. Do people ignore them? Are they effective?
Oral Communication	People are reminded at shift meetings and other places to wash their hands.
Writing	N/A except for the authors of the signs
Document Use	Statistical information about hand hygiene and infections is published in chart form.
Working with others	There is a strong teamwork effort to bring preventable transmissions of infection numbers down in departments.
Numeracy	There is some need to interpret percentages and changes over time in graphs.
Thinking skills	
Continuous learning	
Computer use	Statistical charts about infection rates and hygiene are available on the internet and are easiest to access by computer.

The ways people interact around decision-making

EXAMPLE: Front-line workers receive requests for books and resources that they do not have, for example translation dictionaries to ease communication between clients who do not speak or read English. There is a process to purchase resources, but it requires full ordering information. Workers say they don't have time to do the research or find the needed information so they simply say "no" to the request. Interestingly, once this small decision not to act was captured and shared, the working group discussed the decision and identified several ways to make saying "yes" easier.

What is happening in terms of...

Reading
<p>Oral Communication</p> <p>The request for a book is usually made at the client service desk. The worker might decide to ask for the request in writing, but the client has no internet access and no way to get the information.</p>
<p>Writing</p> <p>There is a form to be filled out by the worker or the client.</p>
<p>Document Use</p> <p>A new process is proposed and drafted that designates who can most easily make this kind of purchase and how and when to refer requests to them.</p>
<p>Working with others</p> <p>Clients may help each other formulate the request.</p>
<p>Numeracy</p> <p>The workers may be working within a set budget, or they might not know how much is available to purchase resources.</p>
Thinking skills
Continuous learning
<p>Computer use</p> <p>An internet search for a book or resource would take less time if there were an approved source. Workers say they don't like to be seen using the internet at work.</p>

Using and adapting the forms

If you find these forms useful, we encourage you to use them or adapt them to capture some of the ways people interact around reading and writing, numeracy, problems, decisions and text on computer screens and signs. Our examples hopefully will give you the idea of the kinds of information you might gather about a situation. This way of organizing notes might appeal to your working groups or engage people if they appreciate structure. It is also a way to introduce the essential skills categories in the context of real situations at work. Further, examples expressed in this way can make it easier to show the actions of literacy beyond reading prose on a page.

How we found our starting place

Identifying embedding opportunities in any situation, but especially the workplace, is an iterative process. You talk to the influential decision-makers and social leaders. You interview or survey front-line workers and the people who support their work. If you are lucky, you might have access to data from the organization about its priorities, challenges and the areas upon which it is focusing improvement efforts.

In our project, we started with people who were far from the front lines and worked our way forward. These people tended to have a “big picture” view of the workplace. In most instances, they willingly shared ideas of how our interest in studying literacy and essential skills in work might intersect with their interest in quality improvement, health and safety, training effectiveness or teamwork. They were the first-level gatekeepers to embedding and we needed them in order to move forward. In each of our sectors, the organizations had multiple worksites and geographic spread. How did we find our starting places?

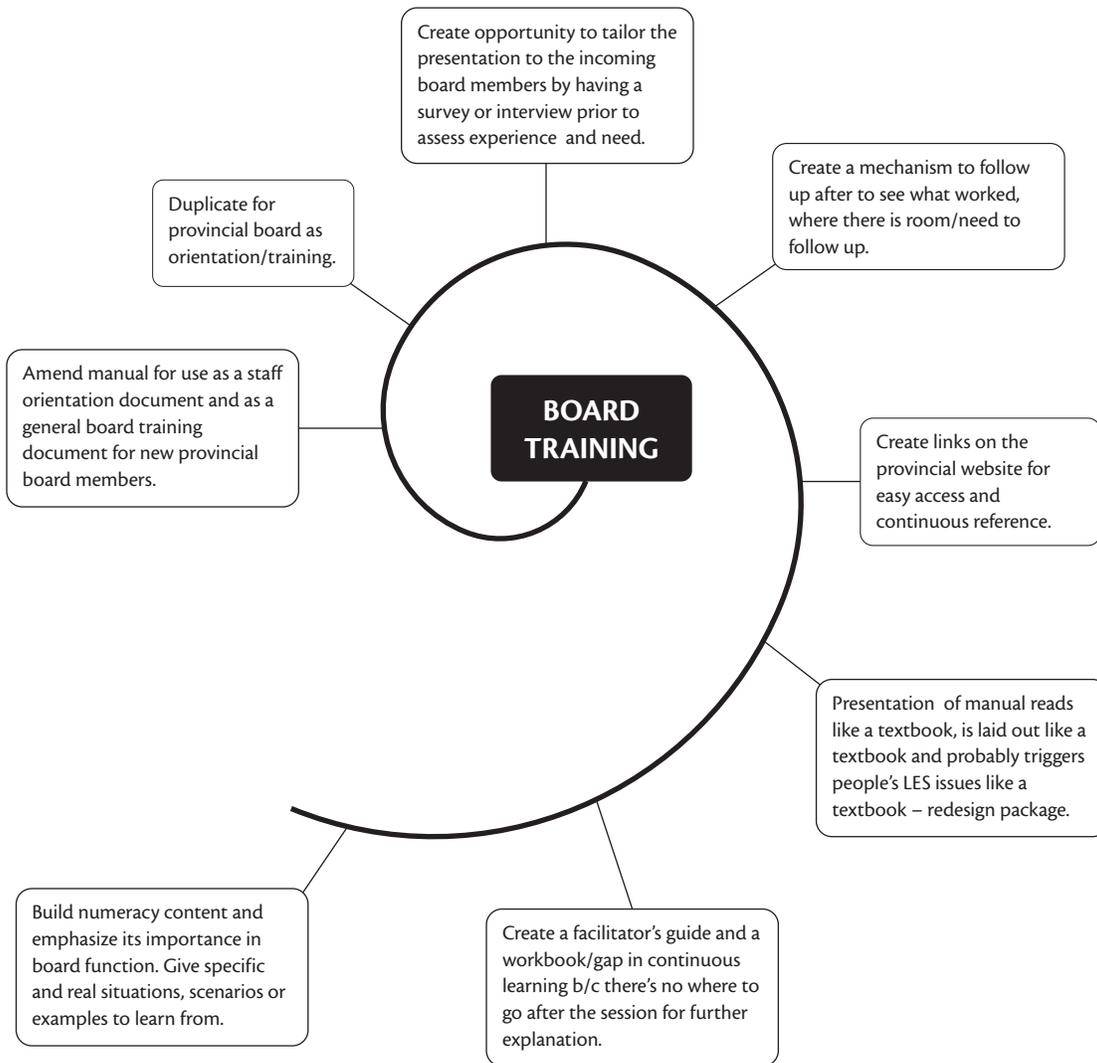


In the pyramid organization, the list of constraints made the way in slow, but fairly straightforward. There really is only one way in, and there were many policies, a criminal record check and even a formal application and review process in order to be able to research and take actions toward embedding.

This sector had multiple worksites, how did we decide which locations and which people to involve? Representatives from each worksite took part in guiding the project and formed the working group. With data from surveys, group interviews and the working groups’ on-the-ground knowledge, three targeted areas were developed into action items for embedding efforts. As fits this kind of workplace, the map of the project was a table with action items, deliverables and timelines. The original notion of working with only two or three locations was revised to work from the central group across all the sites in the province. It was big and ambitious, but it is the way the working group wanted to proceed.



Contrast this highly structured approach with the visual map of embedding opportunities from the collaborative workplace on the next page. Organic, fluid, and decentralized – the graphic map is easy for everyone to understand. It suited them. What works best is what makes sense in the context.



Three common themes to explore

If we step back and look at how engaging people helped us get grounded and find specifics, there are three common themes across our three working environments. We don't know if these are more widely applicable, but they feel important enough to highlight here.

1 At the front-line customer services counter

Where there are problems to be solved for clients and forms to be completed, there is often room for improvement. This also applies to anywhere staff or workers interact with other employees upon whom they rely to get things done. One of the most common situations across the three working environments was the issue of a policy deviation, or a clear rule not followed repeatedly by the same people. This frustrating scenario was ripe for a little “if we keep doing what we are doing we will keep getting the same exasperating result” thinking. Could looking at it through a literacy lens improve the process, the interaction and the form, so that the interaction could happen correctly every time?

2 At the edge of change, especially technological change

Rapid change is a cliché, but it is also a reality. Workers are learning new ways to use computers, share knowledge and hold meetings. There is a great deal of information, much of it vital. Even where people told us they simply did not have the time or the energy to make changes, those changes were happening anyway. Organizations reorganized. Planned computer upgrades went ahead or were delayed. The edge of change is a good place to look for opportunities to embed literacy and essential skills because the needs will be easier to detail as change falters. Also, managers often have a stake in fostering changes, so they are more likely to have time and sometimes the budget to justify their participation.

3 Where there is organizational pain

All organizations have pain, the places where things are not going as planned, or issues that they constantly struggle with. Some of those, for example quality or safety concerns, are clear opportunities. In our experience, exploring the pain of an organization or a department was part of engaging people in seeing the relevance and the potential of embedding literacy and essential skills strategies in their workplace. Our workplace contacts, from directors and managers to front-line workers, all had easily articulated positions on what should be happening, what was actually happening and the gap between.

Sometimes we were the first to see the embedding possibilities. Sometimes, as we have related, a “light bulb moment” lead to the link. If you are new to workplace learning, don't shy away from tackling the learning aspects of an organization's most pressing problems. Literacy and essential skills are not usually the whole answer, but they often contribute to the solution, or at least to an improvement. This is sometimes enough to gain engagement by the people who can drive change in the organization.



Embed Every Which Way

Once you start to see them, it seems that there are endless opportunities to embed an awareness of literacy and essential skills in a workplace.

Frequently we found that competing priorities and a finite capacity for change battled against the compelling notion that participation and learning are well served through embedding literacy and essential skills. So although there are many opportunities, only a few choice threads of change can be picked up and followed. Of those few, some will eventually be dropped. The ones that are knitted into the work culture lay down the patterns for the next round of change and embedding. Our lessons are drawn from experiences over three years. We expect the effects to grow over time as the people involved carry on embedding literacy without our support.



Be patient – stay open to change

We found that some of our researchers had to change their mindset from being teachers and problem-solvers to being advocates for change. They experienced a steep learning curve as they moved from their comfort zone of being instructors or materials writers to being facilitators and resource people. For some, the competition for attention was frustrating. They felt like failures when there were delays or when interest waned. It is normal in a workplace for energy and interest to be reserved for the embedding opportunities that most obviously advance organizational goals. Expect to take longer than you plan and to have setbacks. Be a patient, and learn how to get out of the way.

Examples of how to embed literacy and essential skills

Once you and the people who have power to make changes in their own work and in their workplace can see the opportunities for embedding literacy and essential skills, what happens?

In this section we share examples from our experiences about the range of ways to embed literacy and essential skills. Where we can, we include descriptions of the processes that got us there. We call Lesson Three: Embed every which way. Ours is not the ultimate list. You will certainly find more and different ways, but examples of the ones we made headway with are presented in these categories:

- ▶ Training
- ▶ Work documents and processes
- ▶ Communications and display
- ▶ Assumptions and normal work life

Some of these examples are simply good practice in training and communication. We helped people in a workplace find ways to do their work more efficiently and effectively while being explicit about the role that reading, writing, oral communication and a series of other essential skills have to play in the process.

Even more valuable are the changes in the understanding of the directors, managers and workers who took part. More than the products that we share here, the real and lasting benefits are changes in the mindsets and actions of people. With that in mind, let's look at some examples of the products of embedding literacy, first by looking through the lens of Clear Language and Design.

Clear language and design as a gateway to embedding

In the workplace, as everywhere, readers often struggle to make sense of poor writing. Clear language, sometimes called plain language, aims to make word choices and sentence structures easy to understand for all readers. Clear design extends those aims for clarity-at-a-glance to page layout and text format. One of the hallmarks of a Clear Language and Design (CLAD) approach is that everyone benefits from it. CLAD helps make written communication easier for able readers as much as for people who struggle with reading.

One of the goals of embedding literacy and essential skills thinking in the work environment is to provide opportunities for people to improve those skills through practice. When the material that people need to read is written clearly, people with lower reading skills are able to practice in their work environment. For our researchers who are also literacy practitioners, using clear language and clear design is second nature. For our researchers who were not experienced literacy practitioners and for the sector committee members, learning to write clearly was a revolutionary insight into the complexity of literacy and essential skills in the work environment. Here is an excerpt from a quarterly report:

The more our team and working group examine and understand the notion of embedding literacy, the more it has become obvious that clear language and design have a significant and important role to play.

Over time we came to see that clear language and design was a gateway to embedding. We edited documents, made changes for readability, reviewed and reflected on the results. All three of our work environments settled on using clear language and design as a strategy toward embedding that made sense to them. Why?

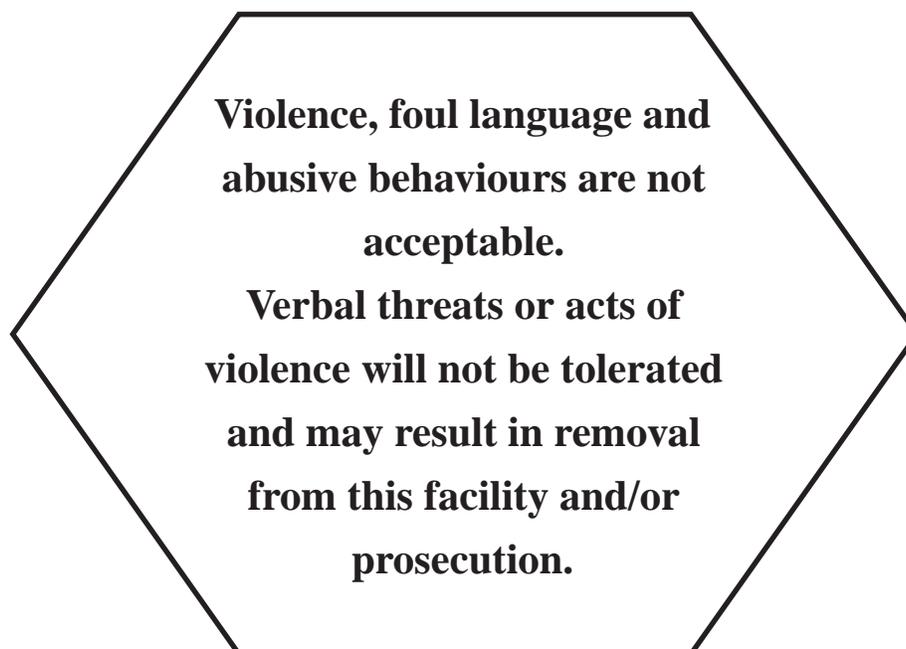
Editing a document, reformatting a poster, making a reader-friendly reporting template are all concrete activities. It is easy to see the improvements. In the process of learning about clear language and design, our participants were able to change the way they interact with text. They were able to say, “I am having trouble understanding this document, and here is why,” and list the steps to improve it.

Everyone is a reader and a writer at work. Many of our steering committee members needed to convey critical information, and clear language and design made the task easier, faster and more likely to be understood. Our research team delivered clear language and design workshops in person and by web conference. They helped edit training and work documents, reports and templates. We believe clear language and design is a gateway to embedding, and the results are immediately obvious.

Clear Language and Design training examples

Our CLAD training was delivered to groups using a workshop approach, emphasizing a basic knowledge of how people read, how formatting and use of white space impact reading, and other principles of CLAD. We used slides to show examples as we introduced the topic and then together applied the principles to documents. Participants were encouraged to bring material they were working on to the session. Here is a *before* and *after* example from our clear language and design training slides. The *before* is a real sign from one of our worksites.

Can we improve this sign?



After applying clear language and design principles, we changed the line justification from centred to left, switched from a passive to an active voice, used bullets to set off information in a list, and made the consequences of violent behaviour easy to understand.

Our centre is a safe place to meet and work.

Please respect our rules.

You will be asked to leave if you:

- act out
- swear
- make threats
- make our staff and clients feel unsafe

What will happen if you break our rules?

We will call the police and you may be arrested and charged with a crime.

The clear language and design training was accompanied by a number of reminder handouts. The following are two of the summary pages from the workshop handouts and an example of the kind of editing the group did together under the heading, “Clear language. Now you try it!” There are many possible improvements to the wording of the example sentences. We offer one set as an example.

Clear Language and Design at a Glance

A document is clear if users can:

- ▶ find what they need.
- ▶ understand what they find.
- ▶ use what they find to meet their needs.

What are the building blocks of clear language and design?

- ▶ Logical organization
- ▶ Personal pronouns
- ▶ The active voice
- ▶ Common, everyday words
- ▶ Short sentences and sections
- ▶ Easy-to-read design features like font choice, white space and lists

Ten clear language tips

- 1 Find out about your readers before you start writing.
- 2 Use “you” and other pronouns to speak directly to readers.
- 3 Use the active voice.
- 4 Use short sentences.
- 5 Use short sections and paragraphs.
- 6 Use “must” instead of “shall” to convey requirements.
- 7 Avoid confusing words and constructions.
- 8 Explain acronyms and abbreviations.
- 9 Use short vertical lists.
- 10 Use simple tables and charts.

Clear Design: Formatting for Ease of Reading

These guidelines take clear language considerations to the level of page layout and text formatting. Use them as part of a strategy to consider readability in clear communication.

Guidelines for setting up your documents

Headings

For headings, use a sans serif font like Arial or Helvetica. Make the first level headings 18 point, followed by 16 point and 14 point. Do not underline, *italicize*, **bold** or centre the headings. Use upper and lower case for headings.

Text size and margins

Make the default text size for the body of the document 12 point in a serif font like Times Roman. Set line spacing at 1.15. All text should be flush left with a ragged right margin. Do not hyphenate words. Margins should be at least one inch all around.

Headers and footers

Title, section information and page numbers should be set at the top or bottom of the page in order to help people find their place.

White space and graphic elements

Use white space generously in the page layout. These blank areas make the page, and the overall document, easier to read. Make sure there is sufficient white space between columns so that readers don't read across columns.

Do not wrap text around a graphic.

Choose a simple circle (•) to set off a bulleted list. Match the bullets to text font size.

Clear language. Now you try it!

- 1 This medication is to be taken before each meal.

Take this medicine before breakfast, lunch and dinner.

- 2 Visitors are asked to register at the nurse's station before proceeding to the patient's room.

Visiting? Stop at the nurse's station to give your name and the name of the person you are visiting

- 3 You are able to eat only before 8 pm

Do not eat after 8pm.

- 4 The general population at large does not understand how important it is to wash your hands.

Most people don't understand that hand washing is important.

- 5 An equivalent amount of water should be added to the same amount of bleach.

Mix equal amounts of water and bleach.

- 6 These forms are to be returned by midnight today.

Return these forms before midnight today.

OR

You must return these forms before midnight today.

A clear language and design mindset

Everything I write now I write with a literacy lens. The CLAD principles are permanently in my mind and part of my practice.

— Comment from a Team Leader

Embedding literacy depends on a shift in thinking. It is a realization that literacy is about creating understanding, and that all work goes better when people understand each other and what they are doing.

Understanding and accepting responsibility to make better word and layout choices is part of this shift for those doing the writing and reading. Learning about clear language and design through workshops and applying that learning is a way to move a shift in thinking to a shift in action. Clear design choices, in particular, are easy to adopt after limited instruction. Making clearer word and syntax choices is a more practiced skill. Both depend on a commitment to clarity.

Many of the examples and stories we share have a clear language and design theme. In the impact assessment for our action research, people who took part in the Clear Language and Design (CLAD) workshops reported substantial changes in their own writing. They also reported teaching others about CLAD and offering feedback to colleagues. Once people understand and practice some of the principles of clear language, they start looking at their writing and the writing of others in a different way.

What is the lesson for you? In all your written interactions become an advocate for clarity. If you aren't yet familiar with it, learn about clear language and design. There are many resources and websites that will help you get started. Watch for opportunities to foster a clear language and design mindset. In our experience, it opens people's thinking to the ways that literacy and essential skills affect everyone.



EXAMPLE 1 – Embedding through training

In addition to clear language and design, there were other ways we found to improve training. By closely examining what is taking place during training, we found places beyond reading and writing where people were getting stuck.

Numeracy and Financial Literacy

On the collaborative workplace embedding opportunities map there is a note about improving numeracy through board training. One of the ways this was addressed was through training in financial management for board members, many of whom have only a beginner’s knowledge of money management and organizational accounting.



In the organization’s own words, from a report on Fundamentals and Advanced Finance:

It was determined through the consultation process that there was a need for both beginner and advanced financial training.

Some attendees were new to their position and required an introduction to financial management fundamentals while others needed an opportunity to address highly specialized questions such as gaming grants, audits and international accounting rule changes.

To meet these needs, two streams were developed to address both basic financial development training and advanced financial development training.

One of the strategies for embedding numeracy in this context is to simply show all the mathematical calculations involved. Frequently facilitators skip the information about where the number comes from or how to calculate an equation, assuming that everyone is familiar with the process. Facilitators don’t want to bore anyone, but in starting too far along and assuming a certain level of numeracy, they lose people along the way.



EXAMPLE 2 – Embedding in work documents and processes

The following is from a report on the ways embedding was taking root in one of the sectors. When the people at the top start to pay attention to the importance of literacy, other people will notice.



It is important to report on an embedding opportunity role modeled by the Executive Director. Each year at the AGM, our Executive Director presents his annual report, which is typically a lengthy and detailed account of the year's activities. This year, our director chose to reformat his presentation and incorporate graphics, charts and timelines to further engage his audience. Adding a literacy lens to the task of creating an annual report helped the director see that by considering and embedding literacy he could greatly enhance the reception of this large volume of information.

The challenge of many workplace documents is the volume of information required to convey to a captive audience who may or may not be reading, listening or following along. The solution is to consider the audience and apply good clear language and design to the documents. In this workplace, the CLAD approach is now the standard way for reporting.

In the next example, the amount of information was the problem, compounded by the complexity of the language and the low literacy level of many of the clients responsible for reading and understanding the document.



Legal contract language and dense formatting is often standard for a handbook or policy guide. Front-line employees are usually the ones who have to convey this detailed information to clients or other staff. In one of our sectors, clear language eliminated wordy structures and long words in the client handbook. Clear design helped to show the relationship between what was allowable and not-allowable behaviour for the clients. In the end, a 16-page handbook was summarized in just one page. This extreme summary captured most, but not all information. While this shorter version has not been approved for use, it does illustrate how complicated language can be clarified. Staff continues to work on these documents to find the clearest complete version. As they worked to distill the information to its essence, people started to see the barriers to understanding that were built into the original version.

The following is an excerpted page from the original 16-page document, followed by a draft version of the revised information

EXAMPLE 3 – Embedding in work documents and processes

This is an example page from a 16-page document before it underwent a clear language and design edit. The poor quality image is reproduced here to show how copies of copies over time contribute to poor readability. The edited document follows on the next page.

You must not:

- (a) Disobey a direction of a staff member or the person in charge;
- (b) Enter any area of a correctional centre in which you are not authorized to be without the permission of a staff member;
- (c) Enter a cell or living unit that is not assigned to you without permission of a staff member;
- (d) Willfully or recklessly damage or destroy property that is not your property;
- (e) Steal or possess stolen property;
- (f) Possess property that is not your property, without permission of the owner of the property;
- (g) Unless unreasonably provoked by that person, behave in an insulting or abusive manner toward a person;
- (h) Behave in manner toward a person that shows hatred or contempt for the person based on the person's race, colour, ancestry, place of origin, religion, marital status, family status, physical or mental disability, sex, sexual orientation or age;
- (i) Engage in an indecent act;
- (j) Engage in horseplay or roughhousing;
- (k) Physically fight with another person;
- (l) Take an intoxicant into your body;
- (m) Tattoo or pierce your body;
- (n) Fail to comply with a demand to submit to urinalysis;
- (o) Obstruct a staff member in doing his or her duties;

What are the rules I must follow?

You must	You must not
<ul style="list-style-type: none"> • Obey orders from staff people • Ask for permission to go into other areas of the centre • Ask for permission to leave work or a program • Speak and act politely and respectfully • Treat anything that does not belong to you with respect • Act in a safe and responsible manner • Ask for permission from a staff person and from the owner to take or use anything that does not belong to you 	<ul style="list-style-type: none"> • Lie to or mislead a staff person • Go into another cell or living unit without permission from a staff person • Refuse to go to work or to programs without permission • Speak or act in a rude, racist or threatening way • Fight, horseplay or hurt anyone • Damage or destroy anything that does not belong to you • Start or join a disturbance • Have, try to get, give or sell contraband • Give or take a bribe • Gamble • Pierce or tattoo your body • Hide your face • Use substances or tobacco without permission from a staff person • Be at large or escape

What happens if I break a rule?

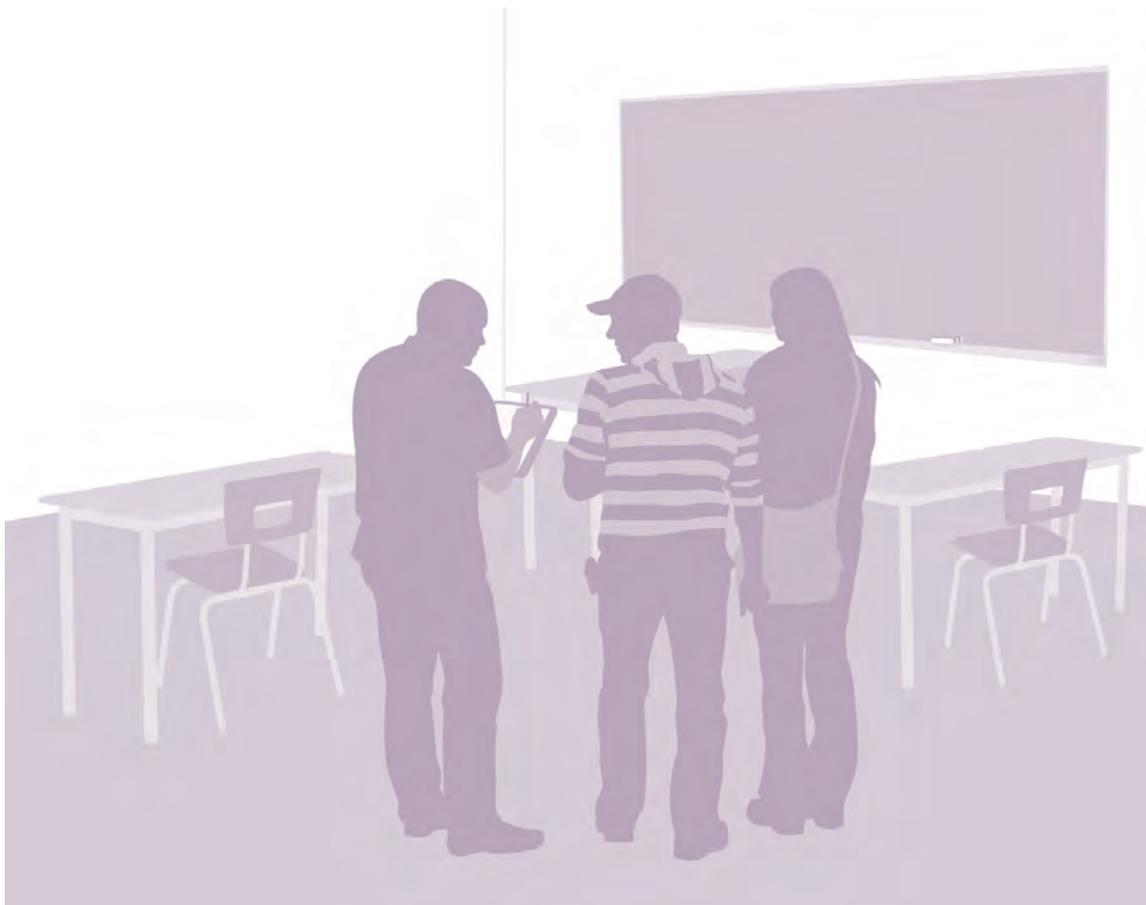
- You might be asked by staff to help solve the problem or situation.
- Staff will write a report saying what rule was broken, if the problem is not solved.
- The person in charge will decide if you will be charged with breaking a rule.
- You will get a letter stating the charges.
- The letter will include the date and time of the hearing.
- You might be put in a segregation cell until your hearing date.

EXAMPLE 4 – Embedding in work documents and processes

Please fill out this form and bring it back to me.

In one of our working environments, this simple direction above was repeated several times every day. There were separate forms for telephone card requests, visitor requests and to make purchases in the canteen. People routinely filled out the wrong form for their request, filled the correct form out incompletely or incorrectly and were generally frustrated with the system and the forms.

Suggestions were made to rewrite, colour code, and add icons to the form. There was also a suggestion to make one form that would cover all the transactions with a simple check box or circling option. However, a planned technology change presented a complication. Sometime in the future, all of these requests and transactions would be digital. So was it worth rethinking and redesigning if it was all going to be on a computer touch screen at some point? In the end, with the technology change on an indefinite timeline, the team made a simple series of edits, added clipart icons and made the fields bigger. There were meetings and conversations where ideas were exchanged to make these improvements. Please refer to the original and revised request forms on the next page.



Original Form

SMART CARD TELEPHONE REQUEST

#

reserve space for transaction #

PLEASE PRINT, DO NOT USE RED INK OR PENCIL

Name (please print) _____ CS# _____

Date: _____ Location: _____

PLEASE DEDUCT THE AMOUNT OF \$ _____

FROM MY TRUST ACCOUNT FOR DEPOSIT TO MY TELEPHONE SMART CARD.

Signature: _____ Date: _____

Unit Staff Approval: _____

Deducted from Cornet Account by _____ Deposited to TAM Account by _____

(I/M Trust Clerk) (I/M Trust Clerk)

Revised Form

Telephone card

- Fill in this form to take money from your account for your telephone card.
- Please print.
- Do not write in pencil or red pen.

Name: _____ CS#: _____

Location: _____

Please take \$ _____ from my Trust Account and deposit it to my Telephone Smart Card.

Date: _____ Signature: _____

Unit Staff Approval: _____ Date: _____

Deducted from Cornet account by: _____ Deposited to TAM account by: _____

(I/M Trust clerk) (I/M Trust clerk)

EXAMPLE 5 – Embedding in work documents and processes

Every workplace has procedures for doing things. Some procedures have simply evolved over time and the information about the way to do it is verbally passed along from one worker to the next. Some procedures are quite formal and carefully written down. In this project, we had the opportunity to work on an important and formal procedure which, to the surprise of everyone, had never been written down in any detail.

This project was the most complex action that we undertook to embed literacy and essential skills in work process documents. Here's how it happened:

Many of the staff in at this workplace offered the opinion that the cleaning staff did not clearly understand the protocols for cleaning rooms under infection control precautions. An early embedding intervention suggestion from the union was to develop laminated cards that would hang on the cleaning carts. These cards would have clear language and design and would use words and pictures to clearly define the steps a cleaner must take in order to clean a room under precaution. With unanimous agreement from the working group members, the team started to research the information that needed to be on the cards.

The research team followed the processes as identified by the workers and wrote them down in clearly defined steps using clear and straightforward language. Once the cleaning process was documented and the working group sat around a table and read it, there was a flurry of concern that the cleaning process was not the way some of the members thought it was, or should be. Through back and forth, revision and review, and much delay, we all learned that neither cleaning to a specific protocol nor documenting in clear language and design was simple.

A set of five “How to Clean” cards, also known as “How to Protect Yourself” cards were developed. They were printed on coloured paper: Airborne precaution on pink, Contact precaution on yellow, and Droplet precaution on blue. The Daily Clean and Discharge Clean with No Isolation were printed on white paper. They were laminated and drilled on the upper left so they could be put on a metal ring to hang from the cleaning carts.

Making the process visible by writing it down clearly did lead to an improvement in the standardization of the process and working to standards. The union's objective that the workers protect themselves became more possible. Everyone's objective that the rooms be clean and safe became more attainable. There were complex interactions between literacy, numeracy, thinking skills and working with others in this particular task.

Working on this task showed our working group members that the solution to this issue did not reside in the worker's literacy levels alone. Everyone had a part to play, and improvements were needed from all sides. At the time of this writing, the report card on the impact of the clarified and clear cleaning procedures was not officially available, but nurses in the participating wards told our researchers that infections were down. Improving quality and safety is a good outcome of embedding literacy and essential skills thinking.

Both sides of the How to Do a Daily Clean: Airborne Precaution Card are shown next as an example and artifact of embedding in work process and in documents.

How to do a daily clean: Airborne precaution

Before you enter the room

- Check the precaution sign on the door. **Follow instructions on the back of this card.**
- Leave all supplies at the door and set up a wet floor sign.
- Put on PPE—respirator, gown, gloves.

1 Enter the room

- ✓ Enter the room with your supplies and close the door. Don't leave the room until you finish cleaning.

2 Collect the garbage

- ✓ Remove the garbage bag. Put in a new liner.
- ✓ Collect all the dirty linen.
- ✓ Check sharps container. Replace the container if needed.
- ✓ Take everything you have collected and leave it by the closed door.

3 Clean the room

- ✓ Disinfect the bedrails and the bedside area with a damp cloth and **Virox**. (Contact time for Virox is **5 minutes**.)
- ✓ Disinfect all the contact points, flat surfaces, and edges.

4 Clean the washroom

- ✓ Put on clean gloves and pull up your goggles.
- ✓ Disinfect all the contact points.

- ✓ Disinfect the sink, including under the sink.
- ✓ Use the workplace bottle of **Virox** to clean the toilet bowl. Disinfect the entire toilet and toilet seat.

5 Restock the room

- ✓ Take off your gloves.
- ✓ Wash your hands and put on clean gloves.
- ✓ Restock the room and washroom.

6 Clean the floor

- ✓ Use a damp mop to clean the floors. Mop the washroom floor last.

7 Take out supplies

- ✓ Take out cleaning supplies and the garbage and linen you collected. Close the door behind you.

8 Take off PPE

- ✓ Take off PPE and goggles. Wash your hands following the instructions on the back of this card.

9 Clean up

- ✓ Disinfect tools and goggles. Discard garbage and linen.

10 Wash your hands

Remember

- Watch for sharps in the bed.
- Do not re-dip used cleaning cloths.
- Do not use a mop head after you have used it to clean an isolation room.

Airborne precautions



If you see a purple Violence Alert sign, go to the nurses' station. The nursing staff will tell you what to do.

Important

- Do not leave the room wearing gloves and gown.
- Always keep the door of the patient's room closed.

Get set up

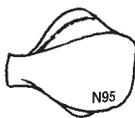
- 1 Put your cart with all the equipment you will need outside the door.
- 2 Set up a wet floor sign.

Before you enter the room

- 1 Wash your hands with soap and water or hand rub.

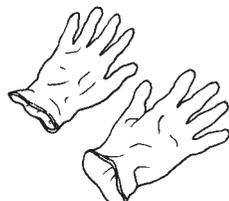


- 2 Put on an N95 respirator.



- 3 Put on a gown.

- 4 Put on gloves.



Before you leave the room

- 1 Take off your gloves. Throw them in the garbage.
- 2 Take off your gown. Don't touch the outside of the gown. Put it in a laundry hamper.
- 3 Wash your hands with soap and water or hand rub.

After you leave the room

- 1 Use the strap to take off your N95 respirator. Throw the respirator in the garbage.

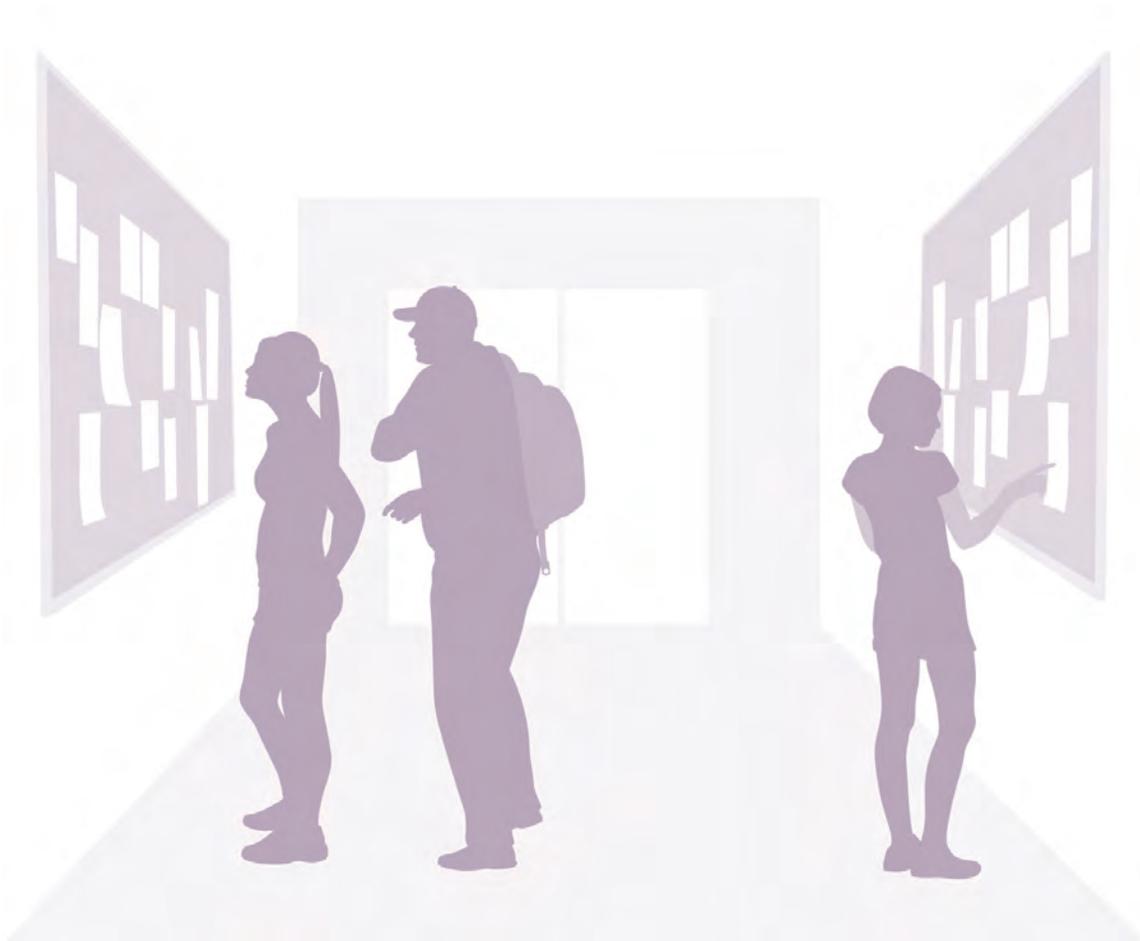
Common reasons for an airborne precaution

- Tuberculosis (TB)
- Measles
- Chicken pox

EXAMPLE 6 – Embedding in communications – bulletin boards

Bulletin boards are a helpful way to convey information to workers and clients. However, bulletin boards are often repositories of a random assortment of notices, posters and other pieces of information with various “best-before” dates. As a result, they lose their effectiveness as tools to broadcast information. People stop looking at them or look at them but can’t find what they need. Inevitably, the clear design initiatives in each of our work environments led to questions about the best way to convey information on bulletin boards. Specifically, was there a standard layout to support ease of reading?

This tip list was developed to share information about best readability practice for displays. The resulting bulletin boards went from chaotic to uncluttered and from difficult to use to easy to use.



Bulletin Board Layout Tips

Bulletin boards are effective ways to share information with staff and clients. Unfortunately bulletin boards often get cluttered with information. They also may include material that is hard to read from a distance. Here are some tips to help improve the readability of your board.

- 1 Identify a person or committee to be responsible for the bulletin board. This includes the task of setting it up and maintaining it.
- 2 Choose categories for the information you need to display.
- 3 Create a basic layout on paper before making the actual bulletin board. This layout could be as simple as a rough sketch of the placement of the various categories. Is there a logical way for the information to flow?
- 4 For the categories of information you are displaying:
 - Create headings to cluster the information.
 - Avoid the use of all-capitals. They are difficult to read.
- 5 Separate the categories using visual clues such as colour backgrounds, familiar icons or clip art.
- 6 Avoid overly bright colours or busy patterns. If using colour-coded paper, choose pastels. Bright colours and busy patterns will compete with the text.
- 7 Use negative space to your advantage.
 - The eye will be drawn to negative space to rest and help make sense of the information.
 - Try not to overcrowd or overlap information.
- 8 Consider laminating headings and other visual elements – trim, art, and icons. This will make them more formal and avoid damage over time.
- 9 All information placed on the board, e.g. sheets of paper and schedules, should follow clear language guidelines. When possible use:
 - common, everyday words
 - the active voice
 - bullet points
 - simple tables and charts
 - white space
 - a larger font (min. size 14)
- 10 Maintain your bulletin board. Remove outdated notices. Keep it current and changing to encourage people to check it regularly.

EXAMPLE 7 – Embedding in communications – newsletters

For any organization, communicating with employees, clients and members is important. Often a newsletter, like the one in this example, is read in different media formats: printed on glossy colour stock, on computer screens, and even on smart phones and small screen formats. Learning about reading and about the literacy challenges of typical Canadians had an impact on the communication strategies in all of our project work environments. Learning about clear language and design was a particular challenge for the people in communication jobs. Their branding activities were set in certain fonts and formats, and all of them had colour pallets to respect.



An editor of a newsletter attended one of our clear language and design workshops and listened to some tough feedback from coworkers. The newsletter looked cool and represented the community well. The branding was right on. But, it was difficult to read. This tension between looking great with interesting graphic elements and ease of reading is common. There is room for compromise between boring layouts and readable prose. The newsletter is intended, after all, to distribute information.

Is this an embedding literacy activity? We think it is another example of clear design as a gateway to embedding. Now that this editor and the organization's head office staff all know about literacy and what makes something easier or harder to read, they continue to take literacy and essential skills into account in planning, in training and in their daily work life. That's definitely embedding.

On the next page is the front page of two issues of the newsletter: one before and one after the CLAD redesign. The one before the clear design workshop features many graphic and visual elements with white and yellow text set on red and black backgrounds. Next to it is the after page with black text on a white background. The editor did not hesitate to sacrifice the dramatic colour scheme to make the newsletter easier to read.





BC Association of Aboriginal Friendship Centres

Issue 6

From November 15 to 17, 2011 the BCAAFC will be holding its second annual political lobby in Victoria, BC at the provincial legislature. The lobby is an opportunity to meet with MLAs and Liberal Cabinet Ministers and host a press conference on the steps of the Legislature announcing the need for an off-reserve Aboriginal strategy that includes Friendship Centres.



The lobby, a part of the overall **Friendship Centre Civic Engagement Campaign**, is designed to influence the BC government to establish a specific, comprehensive off-reserve Aboriginal strategy that includes long-term capacity investment in Friendship Centres throughout the province. Over the last two months, hundreds of submissions have been made to the Government's Finance Committee to urge the government to invest in a strategy. We anticipate that all of the submissions will result in a recommendation to the government to allocate a portion of BC's 2012 provincial budget to the off-reserve Aboriginal community. This past fall has also seen the exciting release of the youth story book "We Stand Together: The positive impacts of Aboriginal Friendship Centres for Canada's Aboriginal Youth". Organized under the leadership of Andrea Landry, the book features stories by urban Aboriginal youth across Canada who have been positively impacted by their local Friendship Centre.

Please visit our lobby website for audio clips, videos, news clippings and general updates!

<http://www.bcaafc.com/initiatives/cecengagement>



Happy 80th
Birthday Ruth Cook

BC Association of Aboriginal Friendship Centres 40th Anniversary Edition

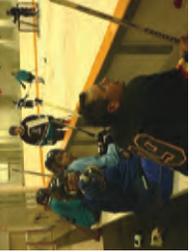
Newsletter Issue 7

Have these past 40 years felt like a game of hockey?

Where you felt nervous and excited all at the same time...



When you challenged yourself and others...



When you played with respect and honor...



When you sometimes felt...

Too tired to stand up...



Like you were being picked on...



Like someone took the shirt off your back...

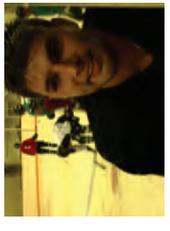


You always remembered that it was about having fun and loving what you do...

So, you shared a laugh...



A story...



And the rest was a blur...



Samples of the front page of the newsletter for the BC Association of Aboriginal Friendship Centres (BCAAFC) before and after the CLAD workshop held at the provincial office on October 27, 2011.

EXAMPLE 8 – Embedding in communications – information sheet



This next example illustrates that even a single encounter with a receptive person can lead to changes in a workplace. Once word got out that there were people who would help with plain language, a concept with which many were familiar, we started to get requests to rewrite materials in our vertical experts work sector. We explained that we were trying to teach people how to approach their own writing in a different way, not simply to provide a service. We offered to work with them on a document or two in order to help them gain clear language and design skills that they might use and pass on to others.

Our team members met with a director who was writing information for new mothers about postnatal depression. The information, as you can see on the following page, was meant for the general public and would be distributed in prenatal information sessions to pregnant women. The message needed to be direct and easy to read.

Our researchers met with the author and talked about her draft document, pointing out some of the sections that seemed difficult to read and understand. The author then went away and rewrote the documents.

Someone who is focused on communication and open to new ideas can grasp the principles of clear language and design and make the documents more readable and accessible. If we were able to stay in touch, we would follow this adept communicator to see how she weaves a growing understanding of literacy into her work.



(Original document)

LOOKING AFTER YOURSELF IS IMPORTANT

During pregnancy and after the birth of a baby, women have many different emotions – from excitement and joy, to worry and sadness. All mothers need physical and emotional support, especially in the first year of parenting. Things that help mothers are a strong social network (partner, family and community) as well as healthy eating, rest, relaxation and exercise.

One in five mothers gets depressed during pregnancy or in the year after the birth or adoption of their baby. In the Vancouver Coastal Health Authority, it is routine that care providers ask women to answer a few simple questions during this period about their adjustment. These questions are called the EPDS, for **“Edinburgh Postnatal Depression Score.”** Women who have a high score on the EPDS need more assessment and perhaps treatment. The EPDS helps the discussion between women and their health care provider.

You don't have to answer the questions if you don't want to.

Supports available to women during pregnancy and the postpartum period are listed on the next page for women living in the ***Vancouver Coastal Health Authority area.***

**Life with a new baby is not always what you expect.
There is help for you and your family.**

(Revised Document)

“WHAT IF I GET THE BABY BLUES?”

How can I find out – and how can I get help

Are all these feelings normal?

During pregnancy and after the birth of your baby, you may feel happy and excited. But you might also feel sad and worried. New mothers go through a lot of different feelings. You can usually get help from your friends and family to cope with these feelings. Eating healthy food, getting lots of rest and exercise will also help you.

When are these feelings a problem?

For some new mothers, those sad and worried feelings can grow and become hard to manage. This is called “Post Partum Depression.” Post Partum Depression can be a serious health problem. It’s important to get help as soon as possible.

How will I know if I need help?

We want to make sure you get help if you need it. After your baby is born, your doctor or nurse will ask you a list of questions about your feelings. This list of question is called the “**Edinburgh Postnatal Depression Score**” or EPDS for short. Your answers will help your doctor or nurse decide if you need extra help with your feelings.

Remember: You don’t have to answer the questions if you don’t want to. It’s up to you.

Where can I find out more about this?

You can find more information about Post Partum Depression and where you can get help on the next page.

EXAMPLE 9 – Embedding in normal work life

When the concept and practice of embedding literacy and essential skills starts to take hold, people begin to make changes, ask questions and integrate an awareness of it into their everyday work life. And people do this on their own, without the intervention or support of a literacy practitioner.



At daily and weekly meetings, front-line workers added the topic of literacy to the standing agenda after a few months of experience in our working group. Right along with safety and staffing issues, they started to ask, “What are we doing for literacy?”

Another staff group deals with the community placement of clients. Our research team was delighted to learn that for the first time, the transition from institution to community included literacy and essential skills on their planning agenda. “What’s the story with this person and his literacy and essential skills? What’s the plan for supporting him in improvement?” They created a tracking form for each client so learning did not fall off the priority list.

If the staff that works with a group of people with one of the lowest literacy levels can start to focus on ways to improve and support these clients, we are optimistic that long-term systems and individual improvements will follow.



In the vertical expert sector, workers originally felt that front-line staff was not absorbing their training because of their literacy levels. We saw a clear shift in the widely held notion that fixing the front-line workers was the only workable solution. Over time people saw that everyone could learn about literacy and essential skills, and that their writing could be much clearer and more effective. People reported that some job descriptions were not clear and work processes were hard to follow. With this more inclusive view came an understanding that front-line workers were not the only source of the training problem. This made a difference in the way people perceived front-line workers. Assumptions about literacy and learning that shaded discussions and decisions by our working group members changed, too. People went from thinking there was no way other than technical language to share information about their field, to looking at communications in print and knowing how they could make them clearer and easier to read.

Along with this came the understanding that clients and family members, who were top priority for service and communication, often had the same literacy challenges as some of the front-line workers. With these two ideas – perceived literacy levels of staff and the best ways to write and speak with the average Canadian – there was a notable shift in the normal discourse. We hope the influence of the directors will spread and reach people who were not involved in our project but who will learn from their peers what it means to embed a consideration for literacy in their work life.



The staff members in this sector are the bridge between the formal world of funders and governments and welcoming, come-as-you-are community centres. Working not exactly as translators but more like bilingual, bicultural resources, their normal assumptions about their work shifted when they realized that the formal was sometimes the dominant working mode even when they were dealing with the communities.

It is challenging to always consider the audience when you write. It is hard to put aside the way you learned to write in high school or university. A flat organizational structure and the central training and communication role of the organization, along with a commitment to embedding literacy and numeracy ‘every which way,’ has lead people in this work environment to recognize the unlimited opportunities for embedding.

About embedding every which way

We have shown examples of embedding literacy and essential skills in training, work documents, work processes, communications, bulletin board displays and in the assumptions people hold about everyday life at work. We shared nine brief stories, six before-and-after examples and four additional examples in order to convey the range of our “every which way”.

How to Clean cards or revised information for the public are easy to share and show. It is more difficult to convey the way, over time, that the learning impacts the practice of the workplace. Changes in the way work is performed, for example, are snapshots, at best, of an evolving process. Communication, if not written, can be fleeting and hard to capture. We observed changes in teamwork, in cooperation and in attitudes between partner groups and work colleagues. Learning and change occurred together.

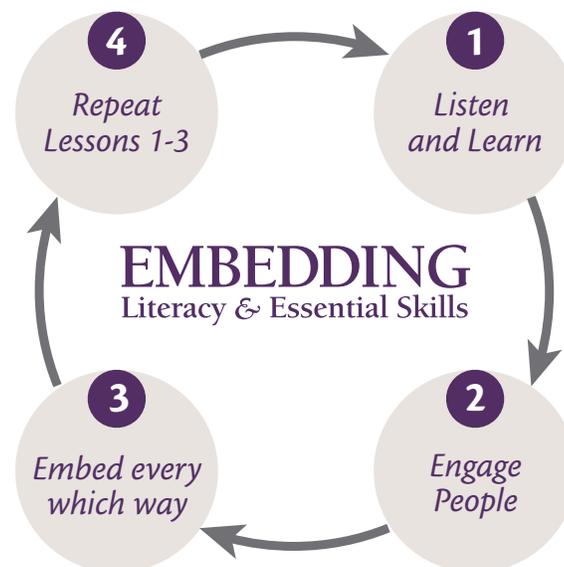
When you apply embedding every which way, it is imperative to follow the needs and interests of the workplace. We found that working collaboratively with the leaders in a workplace and listening carefully to them made it easier to find the opportunities to try to apply embedding strategies to problems they wanted to solve. We found clear language and design to be a reliable gateway to engage people in embedding literacy.

Remember that people in a workplace have work to do. They need to get their work done efficiently and effectively. If you can help them do that by embedding literacy and essential skills, they will invite your participation. Follow what we previously called the ‘pain of the workplace’ and work on real issues. When you can do that, people will give you their time and attention.





Repeat Lessons One, Two and Three



With embedding, as in most development work, you start over again repeatedly, not from the beginning, but from where you arrive after each development cycle. Listen some more. If your experience is anything like ours, people will change jobs through reorganization. You will have new people to listen to and engage. Priorities may shift, or there may be less capacity for change and plans will have to be reviewed and revised. The lessons from our research are organized in an iterative circle. This circle is common in business models of improvement and educational descriptions of curriculum development.

As you go along, evaluate and adjust. There is a smaller development circle in each quadrant of our model. While engaging people (Lesson Two), for example, you will still be listening, and you may start actions to embed, like Clear Language and Design workshops. Lesson Four encourages us to embrace the process and not get distracted by a linear explanation. There is no recipe except to listen and learn, engage people, and try to embed every which way you can. A culture of embedding literacy and essential skills in a workplace will eventually take hold. The people you have worked with will carry on and keep going. And you can get out of the way.

How to know if you are making progress

As people start to adopt new ways of looking at their workplace through the literacy and essential skills lenses, they may not be able to tell that embedding is working. You will likely see the signs before anyone else does. In our research, the clear language and design gateway yielded advocates and dramatic changes fairly quickly. When a director started handing reports back with the comment, “Good draft, now bring me a version in clear language with good design for readability,” we knew we were making progress.

When that kind of consideration is automatic, you are witnessing a culture change, through embedding.

Another sign that embedding is working is when people put literacy on the agenda on their own. This happened in our research sites. As noted earlier, in one workplace environment, literacy and essential skills made it onto the morning meeting agenda. Every day in their office huddle meeting, people asked: “What are we doing for literacy today?” Their clients are statistically among Canadians with the lowest literacy and essential skills levels, so making a plan for learning in the community is a powerful change. On their own, client service representatives added literacy and essential skills planning when they transfer a client to an outside field representative.

You will also find evidence in how planning develops, and what training looks like as people integrate literacy and essential skills ideas into their world view. People start to see communication or work processes that don’t pass a literacy and essential skills filter as a waste of time and money. They share this new standard with other departments and embedding spreads and takes root.

What if it doesn’t take?

People change jobs. Crises happen. Sometimes there simply isn’t enough energy and time in an organization to make too many changes at once. Regroup, refocus and do something doable. As we said before, embedding is an iterative process that takes time. Don’t be discouraged. Keep listening. Keep engaging people.



Concluding remarks

About workplace structure

It is possible that the place you choose to work on embedding literacy and essential skills will not have one clear structure or management style. Very likely the management group will be trying to become a hybrid of structures and collaboration. If they have departments of experts, they may be trying to break down those vertical department walls with teams. Be ready to accept more than one structure at the same time. Also consider that the way the top managers describe their workplace organizing principles may be the goal they are trying to reach, not the current state of the company.

About clear language and design

For our project, teaching people about clear language and design was a gateway into embedding literacy and essential skills into work life. We think it can also work for you. It makes sense that writers accept some responsibility for conveying a clear message.

Documents are concrete. We can look at them together. Working together we can freeze the words on the page and then unfreeze them, rearrange them and look again. This visual process makes it possible for people to actively participate and contribute to the changes that can make a document clearer and easier to understand. The process of editing for clear language, and revising design for easier readability, is a structured process. Although there are different ways to do the editing and formatting, there are rules or guidelines to follow.

These guidelines mean that a bit of knowledge in this area is easy to apply – right away. An editing eye for readability is highly transferable and people who learn it can spot that a document can be improved and know why and how to do it. We didn't discover any better way to quickly spread a concern for owning literacy and essential skills in a work culture than through the gateway of clear language and design.

About embedding literacy and essential skills in the workplace

We have shared with you some of the lessons we learned about embedding literacy and essential skills in training, work processes and documents, communication and in work life. In summary, our experience shows us that time, relationships and learning together help navigate the dynamics of the workplace. Also, we experienced time and again that the people in the workplace and their priorities have to be engaged.

In the busy world of work, with the high stakes of livelihood and sustainability, people don't pay attention to something like literacy and essential skills for the simple sake of knowing about it. They pay attention and participate if these foundational skills carry one of the pieces to the puzzles they are trying to solve. Failure and frustration in some key aspect of work often move influential people to look further for help. Embedding literacy and essential skills in the workplace is a longer-term strategy, not a four-hour or four-week fix, but it is one with lasting potential to create understanding, support learning and make positive change.

We wish you the best of luck on your journey of embedding literacy and essential skills into your workplace, community, or organization.

