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# Case Study 1: Nova Scotia – Équipe d’alphabétisation Nouvelle-Écosse

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October 31, 2014

## Introduction

Education offerings for adults with limited literacy skills too often consist of stand-alone programs tied to specific funding objectives. Integrated programming, in contrast, offers the opportunity to combine programs and services in effective and meaningful ways to meet the needs of learners, not institutions.

While some have documented what integrated programming is and why it is worth considering, few have described the realities faced by those who attempt to implement it<sup>1</sup>. In order to address this knowledge gap, a two-year project, funded through Employment and Social Development Canada’s Office of Literacy and Essential Skills, is exploring and documenting the process of implementation in different contexts. *Designed to Work / Sur Mesure pour l’Emploi* is working in four provinces to support implementation sites as they set up integrated programming for adults with limited literacy skills. Within this project, research is being conducted to identify the conditions that are conducive to the establishment of integrated programs. Case studies are being used to explore how these programs are implemented. An in-depth understanding of the implementation processes undertaken in different provinces, and in particular an analysis across the cases, will allow the project to address the question guiding the research: *What are the conditions that are conducive to developing and delivering integrated programs?*

## Research methods

Three data collection techniques were used to gather data from Équipe d’alphabétisation Nouvelle-Écosse (EANE), the implementation site used to produce this case study: individual interviews, group interviews and document review. To carry out the research, two researchers visited EANE over a two-day period in February, 2014. The visit included an opportunity to identify documents created or used during implementation. Copies of these documents were

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<sup>1</sup> See RESDAC’s report, *The what & why of integrated programming: A review of the literature*, by Geraci & Mazzulla (2013).

emailed to researchers following the visit. Interviews were conducted in English; documents were reviewed in the language in which they were produced. At EANE, the project coordinator and the executive director shared responsibility for implementation of the program. The following interviews with program staff and steering committee members were conducted in person:

- Group interview with project coordinator and the executive director
- Two individual interviews with trainers
- One individual interview with the project coordinator
- One individual interview with the executive director
- One group interview with steering committee members (two researchers, RESDAC support personnel, executive director and project coordinator were also present)

Following the site visits, one telephone interview was conducted with RESDAC support personnel and a follow-up telephone interview was conducted with the executive director and project coordinator in May, 2014 to gather supplemental information about the program's activities since the site visit. Program staff reviewed a draft of this case study to offer corrections and clarifications, and to elaborate on the contents as they viewed necessary.

This case study captures activities associated with all aspects of the implementation process, from project initiation to evaluation.

## Case Study

### Program Description

The newly created program, titled "Bilingual customer service representative" comprised approximately 650 training hours, including two work placements, scheduled over a 23-week period. Participants attended the skills upgrading portion of the program four days per week and the work placements five days per week.

The program was intended to cover the basics of customer service and was organized into three courses: customer service, basic computer skills and digital technology, and personal development<sup>2</sup>. The program was influenced by RESDAC's integrated model, which emphasizes the development of all the abilities necessary to perform job tasks in the targeted occupation. Participants received certificates for completion of some courses within the program, including

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<sup>2</sup> EANE referred to the courses as *Service à la clientèle*, *Introduction à l'informatique* and *Développement personnel*.

WHMIS and First Aid, however completion of the program itself did not result in an industry-recognized credential.

The content of the three courses was divided into two training blocks. Participants must have completed both blocks in order to receive a certificate of completion. The blocks offered two entry points for participants, and could be done in either order. Each training block offered a work placement. Participants' first work placement offered orientation to the workplace and formative assessment opportunities. The second work placement ran for three weeks, providing participants the opportunity to integrate fully into the work environment and to be evaluated on their participation and performance on specified tasks.

## Context

EANE has served the Acadian population since 1992. The organization offers French language and French conversation programming. Unlike other literacy service providers in Nova Scotia, EANE is funded by the provincial government to provide services to all Francophones in communities across the province. EANE's core staff includes an executive director and a project coordinator who is also responsible for family literacy programming on a part-time basis. Staff members are not employed during the summer months. The offices of EANE are located in a learning centre on the west coast of Nova Scotia, amongst small fishing communities. This was the setting for the case study.

With provincial funding shifting in recent years towards employability, many literacy providers had begun developing programs whose aim is to upgrade participants' skills for their transition to employment. As more and more emphasis was placed on employability, EANE recognized an ever-widening gap between the province's orientation and their own program offerings. One staff member describes it as a realization, "[...] that we probably weren't serving our population the way they should be served." Program staff had a strong sense that the Acadian population could benefit from skills upgrading. International literacy survey results (IALLS, PIAAC) revealed that Acadians' literacy rates remained lower than average, and staff's own familiarity with local communities told them there was significant underemployment and seasonal employment amongst Acadians.

With these factors playing in the background, a presentation given by RESDAC on integrated programming really hit the mark. The staff person who attended the presentation recognized in the description of integrated programming something they could do that would serve their target population more effectively than what was being delivered. Both staff members began to investigate possibilities, and to learn more about the model. Even before funding was secured for the *Designed to Work / Sur Mesure pour l'Emploi* project, EANE began efforts to implement an integrated program in their community with support from RESDAC.



## Initiation

From those initial presentations, it took an additional two years for the integrated program to be up and running. Major efforts were directed to securing funding from different provincial government ministries and several divisions within one ministry, and to garnering support from local organizations and employers. The executive director spent months at the early stages selling the idea within the community amongst service providers and employers. Already a member of a local employability roundtable serving Acadians, the executive director arranged for presentations to its members on the integrated model. Like the executive director, roundtable members, who included service providers, government representatives and employment services partners, found the idea appealing. The integrated model sparked real interest amongst those who learned about it, with a staff member commenting, “People are easily convinced that the model works. It doesn’t take a lot of convincing at all.” They were able to capitalize on this interest by establishing local partnerships, some of which grew into involvement on the initiative’s steering committee once it was established. Government representatives in particular expressed interest in the model, which seemed consistent with the direction they were moving in, towards employment-focussed, competency-based programming. The provider received a letter of support from their provincial government representatives and was able to secure funding to research employment and service needs at a local level. At the same time, EANE worked with RESDAC staff to begin investigating what they considered to be best practices in similar programming around the province. They visited another agency in the province offering employment services and skills training, including basic education and soft skills instruction. From their staff, they learned about the ways in which programming was organized, as well as about instructional and assessment tools and resources.

### *Needs identification*

As interest in the proposed model increased, employers in the area also responded positively to the notion of integrating employability and technical skills into skills upgrading. EANE joined an existing initiative by the province’s workplace education department to conduct regional employer needs assessments. EANE identified data they wanted to collect from employers and added questions to the prepared survey to gather this data. When they received the initial analysis of survey results, steering committee members and staff felt the analysis did not provide them with information useful in program planning. They then arranged for a subsequent analysis of the raw data to better address their needs, focussing on a broader skills perspective rather than solely on essential skills needs.

Given its broad orientation, the survey results were used to identify occupational skills found in common across employers. The needs assessment did not reveal any specific labour market needs, and in fact revealed few job opportunities were available generally. The steering committee recognized customer service skills as fitting with many employers' needs, and considered this a viable focus for the integrated program. Other considerations in deciding the focus included a view towards longer-term employment opportunities in the region, and the availability of training facilities. For example, food service preparation was ruled out at this stage in recognition that adequate kitchen facilities were not available for training purposes. The training facilities and equipment required for customer service were accessible within the community, thereby confirming this as the program's focus.

With the focus established, program staff then attempted to learn more about customer service requirements through labour market resources such as National Occupational Classification descriptions, although they acknowledge they had difficulty finding the level of detail they were looking for to help them with plan programming. Staff also made efforts to secure approval of the local post-secondary institution's campus administrator to host the program at their campus location. Negotiations included some re-examination of the program to differentiate it from another program the college planned to offer that included customer service skills.

## Design

### *Program Design*

Program features were refined through the needs analysis phase in consultation with RESDAC, steering committee members and government representatives. The integrated nature of the program would be reflected in its combination of customer service skills and soft skills development. The program's bilingual orientation was intended to meet the region's workplace expectations, namely that employees be able to work flexibly in both French and English. A decision was made to target clients with abilities in the Essential Skills level 2 range, a level relatively common amongst unemployed and underemployed Acadian adults in the area, and considered appropriate for a short-term, intensive program model. The duration of the program was set at 23 weeks. Program orientation was to be competency-based, with an emphasis on the tasks individuals carry out on the job. Work placements would be incorporated into the design to allow participants opportunities to apply newly learned skills in workplace settings. Learning objectives were informed by an analysis of National Occupational Classifications and skills identified through the employer needs assessment. A curriculum developer was hired, working over the next three months with staff and input from RESDAC support personnel to craft a program outline.

Developing curriculum from scratch presented a major challenge to staff, who were themselves new to task-based programming and to the workplace orientation they knew materials would need to support. Attempts to find similar curricula that could serve as a starting point were largely unsuccessful, with the exception of some courses developed by another Nova Scotia skills development provider. Once a curriculum developer was hired, RESDAC support personnel provided direction on the features of task-based programming and its key positioning in the integrated model. The curriculum developer used the tasks individuals in customer service jobs carry out at work, and existing instructional content related to the courses to map out the materials. The end products are three curriculum guides, one for each course offered in the program: customer service, basic computer skills and digital technology, and personal development. Each course's curriculum guide provides a structure for teaching over the 23 weeks, including course outcomes, explanatory text to introduce and situate the content, and a combination of activities and suggested activities and evaluation criteria. The three courses were oriented towards helping participants gain knowledge of and experience with customer service techniques, to acquire technical skills, and to develop employability skills.

### *Steering Committee*

The steering committee was established early in the initiation stage, while efforts were still underway to convince funders of the merits of integrated programming. Committee members were selected for their positions within the broader Acadian community, with an eye to individuals who would be helpful in moving the initiative forward. A total of ten members made up the committee, recruited from employment service agencies, the local post-secondary institution and provincial and municipal government and an economic development council. The committee met frequently when first struck, then settled into a schedule of quarterly meetings. Committee members were involved early on in analyzing the preliminary needs assessment and deciding the occupational focus. As the program took shape, the committee provided input on the budget, reviewed curriculum guides, advised on outreach and promotional strategies and materials, clarified funder requirements and debated participant eligibility. One committee member was instrumental in securing the program location and in efforts to analyze needs assessment data.

Staff had hoped the steering committee would be active in program recruitment; however, with one exception, these referrals never materialized. Information sharing was made more challenging by turnover of committee members, sometimes due to staff changes at the agencies that employed them, other times to accommodate individuals' varying workloads. This variability made decision-making more difficult, as it was often necessary to review information for the benefit of new members, leaving less time for new activities and new topics of discussion, as well as for troubleshooting problems as they arose. In reflection, staff believe the committee composition would have been stronger had there been more members holding decision-making

authority within their own organizations. It was also felt that having representation from employers would provide a business perspective.

### *Staffing Model*

The program design stage was wrapped up approximately four months before the scheduled start date. The staff member in the role of project coordinator was tasked with leading implementation efforts, and began to take on more of the day-to-day operational activities. The executive director remained the point of contact for government and steering committee members. Influenced by their visit to another Nova Scotia employment services program, the plan was to operate with two full-time trainers, one in a counselling role delivering the personal development course and the other instructing the customer service and computer skills courses.

Hiring instructional staff was a priority in the two months leading up to the projected program start date. Job advertisements for trainers yielded few responses, however, possibly due to the specialized skills they were seeking and the relatively short-term employment period (roughly eight months). Efforts were redirected to hiring individuals whose experience, schedules and availability would work within the program structure. In the end, they were able to hire one part-time counsellor, one full-time technical trainer, and a part-time instructor to lead portfolio development, and the staffing model was changed to reflect the availability of those who were hired with the appropriate combination of experience and skills. The staffing model was changed before Block B because the full-time trainer resigned and they could only find two part-time trainers to fulfill the responsibilities. The project coordinator took on additional operational responsibilities such as setting up guest speakers, acquiring resources and arranging work placements, activities that would have been performed by instructors had two full-time instructors been hired.

There is agreement that the trainers hired had a good sense of the clientele and their needs. Having trainers with customer service experience lends credibility to the program that would be difficult to achieve with academic trainers alone. The individual hired in the counselling role had a background in social work, providing her with insight into some of the challenges experienced by program participants, and helping her ground the soft skills portion of the programming in authentic situations.

### *Resources*

EANE's approach was to seek funding to develop programming, with a longer-term goal of securing additional funds for program delivery. EANE's operating budget did not allow them to reallocate existing resources to the development of an integrated program. Instead, they secured funds from the provincial government to develop a pilot, with the understanding that

the provider would receive further funding and support from RESDAC towards these efforts. RESDAC offered financial support for program design consultation, aimed to assist with initiation and development efforts. This support was perceived to be critical to EANE's ability to get the initiative off the ground.

Many of the challenges identified by program staff are perceived to relate to funding. As EANE was new to this type of programming and to the target client group, the learning curve was steep. Staff spent a significant proportion of their time identifying potential funders and learning about their funding criteria and application processes. They experienced protracted time periods where they could not move forward in the design process because they were waiting for funding to be approved or to arrive. Program delivery funding was received late in the design phase, which meant EANE had to cover expenses until funding was available. This added strain to an already demanding implementation process, and diverted their attention from other activities they needed to carry out.

### *Recruitment and Outreach*

Staff turned their attention towards recruitment during the program design stage. This entailed clarifying characteristics of the target client group, and seeking advice from steering committee members on ways to reach potential clients. Little publicity was planned prior to the program's scheduled start date, with recruitment largely focussed on steering committee members and local employment service providers making program referrals.

Recruitment efforts were a struggle for program staff. Staff puzzled over how to attract individuals in receipt of different income supports, from employment insurance to social assistance, as well as individuals not in receipt of any government assistance. Given the integrated nature of the program, eligibility criteria and funding mechanisms needed to be worked out amongst all stakeholders. The program design was unfamiliar to funders, who were accustomed to programs that target specific client groups, often associated with income sources; one staff member expressed the challenge as, "Everyone was used to working with one pot of funding at a time."

Several factors are seen to have contributed to low recruitment numbers. The agency itself has a relatively low profile within the community and no history of offering employment-oriented skills training. As well, partnerships were not formalized in the pilot offering of the program. Staff members identify that further developing links to others in the community could have had a positive impact on referrals and recruitment efforts. These include community resource centres who have a high profile within the community and who reach a broad client base. Staff also feel that having clearer internal policies regarding eligibility and training supports would have made some aspects of recruitment more straightforward.

One factor affecting recruitment may reside in how the program was described in outreach efforts, possibly leading potential participants to think of it as a program offered entirely in French. With older Acadians in the region having been educated in English and therefore possibly less confident about their reading and writing skills in French, their language of choice for employment-focussed skills training might tend towards English.

Program supports had not been finalized during the recruitment phase, which meant that program staff could not confirm what type of financial supports would be available to clients with different forms of income support. Several steering committee members conjecture that a reluctance to embrace change may have steered potential clients away from this group-oriented, French-language training program in favour of returning to traditional forms of seasonally available employment. Systemic barriers were also cited as possibly preventing candidates from applying to the program. Referral agencies did not have a common interpretation of which clients were eligible to participate in skills training programs.

The decision to divide the 23-week program into two training blocks was made in an effort to address challenges with recruitment. This reorganization allowed EANE to undertake a second recruitment phase mid-way through the 23-week period to introduce more learners into the program. In the second training block, outreach efforts were intensified, and included producing print-based outreach materials, and advertising in newspapers and on the radio.

## Development and Delivery

### *Intake*

Intake processes were initiated approximately one month prior to the projected program start date. The process included screening potential clients' skills using CAMERA, a workforce-oriented literacy assessment<sup>3</sup>. Individuals whose scores indicated their literacy levels were at essential skills level 1 were not considered eligible for the program. Of the nine individuals who completed the intake assessments, seven were accepted in the program. Of those seven, one chose not to attend and advised the program ahead of time, two clients did not show up for the program and could not be contacted, one client in receipt of Employment Insurance did not have her claim activated until four weeks into the program and so decided it was too late to

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<sup>3</sup> CAMERA (Communications and Numeracy Employment Readiness Assessment) is a literacy and numeracy assessment system designed for workforce programming. The French-language version is CAMERA en français. CAMERA is available through PTP Adult Learning and Employment Programs, Toronto, Ontario. [www.ptp.ca](http://www.ptp.ca).

start. Thus, the program began with three participants, all of whom remained throughout both training blocks. The second intake phase that occurred prior to the start of the second block added two learners to the group, for a total of five participants completing Block B.

### *Curriculum Development*

Trainers used the curriculum guides as a starting point for further development during program delivery. They sourced materials from other skills development programs, some of which were developed for a similar client group. Trainers added activities using their own resources or materials found online, and built in time for discussions and role-playing to explore topics and reinforce learning. Online videos were seen as a particularly useful way of illustrating customer service scenarios. One trainer describes her approach as, "...a lot of digging online or (...) trying to think of role playing, I guess, in different situations." Guest speakers were brought in who could lend different workplace and sector perspectives on employability skills requirements and customer service expectations.

There is agreement amongst staff that the curriculum guides helped to shape the courses and to provide direction to trainers. Adding concrete examples of workplace tasks and emphasizing the task-based nature of the program are two ways staff can see improving the materials for future programming. Time to develop tools and resources is a commodity that trainers agree is required, with one trainer estimating she spent about one and a half hours of each teaching day finding, organizing and creating content to build on the curriculum guides. Having opportunities to meet for planning and sharing was perceived as valuable and sometimes in short supply. These meetings afforded opportunities for trainers to integrate curriculum more effectively by planning how content could be addressed across courses. At minimum, trainers tried to connect every few days to keep each other apprised of the content they were covering.

A conscious effort was made to steer away from traditional teaching approaches in which participants are treated as passive recipients of information. Trainers found that participatory activities and discussions were the most popular ways for participants to learn; the ideal was described as, "Anything hands-on. They don't want to sit and listen to you talk. They want to stay active." The educational approach they aimed for is summed up by one trainer, "We're using the word *formateur* or *formatrice* [trainer]...and we are using the word participants as well. So we're not talking about school. We are trying to use different language so it encompasses the philosophy that we are all adults here trying to share experiences and learn and better ourselves." The small class sizes presented challenges for group work, which trainers tried to overcome by inviting EANE staff members to participate in group-based discussions and activities.

Given the courses' integrated approach to skills development, French and English were used interchangeably throughout sessions. With increased availability of French-language elementary and secondary schooling in the province over the last few decades, younger participants tend to have developed stronger writing skills in French than their older peers, while the older students may feel more confident about their French oral language skills. Discussions tended to be in French, whereas written materials were in both languages. It depended largely on what was available, with trainers commenting that French-language resources are in short supply and difficult to find.

### *Assessment*

Early in the planning stages EANE staff discussed the possibility of using CAMERA for the purpose of identifying potential clients with suitable levels of essential skills. A French-language adaptation of the CAMERA assessments were underway at the time, and consideration was given as to which language would be most appropriate for assessment purposes. In the end, intake assessments were carried out with the English-language version of the CAMERA Placement. Program staff decided to assess literacy skills in English, partially in response to clients' concerns that their French-language reading and writing skills were weaker than their English-language skills.

Assessment within the technical skills component was intended to be competency-based, with participants able to retake assessments until they met the success criteria. Each course module included broad evaluation objectives, rather than specific assessment activities; examples include "Capable of listening to customer needs" and "Understands the costs associated with losing a client".

Several staff members interviewed felt the program had not built in enough evaluation. They had wanted to evaluate participants with some regularity but struggled with how to carry out evaluations. Staff identified a desire to learn more about learner assessment, including what tools and methods are in use and how to incorporate assessment into programming. As Block B began, the project coordinator and executive director worked with RESDAC support staff to develop assessment rubric templates. These templates were then used to create rubrics that include smaller observable tasks and skills. Staff report that the assessment activities worked well as collaborative exercises, with all trainers and the project coordinator contributing to the assessment reporting. They indicate that more time should be devoted to planning and developing further formative assessments and evaluation tools in any subsequent program offering.

The employability skills component of the program was assessed through the use of the ESAT<sup>4</sup> system. EANE used the tool for self, peer and instructor assessment of employability skills. Staff found the tool useful in that it focused on self-reflection for participants and offered staff mechanisms for providing constructive feedback on aspects of behaviour that contribute significantly to success in employment.

Work placements included self-evaluation by participants and evaluation by employers and by staff. The self-evaluation tool, developed by EANE and focussed on a combination of technical and soft skills, asked participants to rate their skills development and to reflect on what they learned from the experience. They were also asked to indicate which of 12 broad skills identified they had a chance to observe and practise, and whether they felt confident as a result. Employers were asked to complete a rubric in which they rated participants' abilities on 15 aspects of employability. These included punctuality, work habits, motivation, communication, and ability to accept criticism among others.

## Evaluation

An independent consultant was hired to help staff conduct a formal evaluation of the program upon completion of Block B. The consultant suggested that staff members carry out a series of activities, in which they examined what was covered in each of the courses, week by week. This review enabled staff to identify what worked, what they would change, add and remove if the courses were offered again. While staff originally thought the exercise could include a detailed examination of the essential and employability skills covered in the courses, this level of detail proved to be too onerous to develop, thus the examination stayed at the level of broader topics.

Staff agreed that in any further offerings of the program, they would develop and evaluate soft skills within the other courses, rather than isolating them in the personal development course. They would do more job preparation and interview preparation and focus less on the ESAT tool as the organizing principle for the program, believing these changes would provide a more authentic way for participants to see the relevance of these skills and offer a more effective and fair way to identify skills development that takes place.

A future offering would focus on the same occupational skills of customer service, as staff members believe this is attractive for potential clients and comparatively easy to deliver. They met with the local college to determine whether the relationship between the two organizations and the respective customer service programs each offer could be further differentiated and

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<sup>4</sup> ESAT (Employability Skills Assessment Tool) includes a framework for developing and assessing nine employability skills. It is available through Futureworx, Truro, Nova Scotia.  
<http://futureworx.ca/content/esat>

formalized. The question of certification for EANE's integrated program remained under examination at the time of writing.

Program evaluation activities enabled EANE to consider strengths and gaps in their integrated program. Evaluation activities also proved useful to the provincial ministry responsible for funding EANE and who spearheaded the evaluation, as they learned more about the challenges and successes of delivering integrated programming. As a result of this effort, EANE was asked to work with two other provincially funded literacy organizations with an interest in employment-oriented programming, to identify best practices. The hope was that future efforts at integrated programming in the province could benefit directly from the experiences of EANE.

## Looking Forward

At the time of writing, EANE had plans to offer the program again six months later. The organization had secured some funding, but funds were not yet sufficient to run the program. The target group for the program would continue to be adults who face barriers to employment.