

Measuring SMSD Skills in Literacy Learners: Using United Way's Outcomes Measurement Model

Final Report

Quinte Action Research Team

Acknowledgements

The report was developed as part of the national action research project: *Connecting the Dots: Improving Accountability in the Adult Literacy Field in Canada*.

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Introduction

Quinte Adult Day School (QADS) is a community-based agency that helps adults upgrade their literacy, numeracy and computers skills to further their employment and education goals. As practitioners, we have often observed that those who demonstrate strong self- management, self-direction (SMSD) skills, but possess lower core literacy skills achieve and maintain success (as defined by MTCU) more easily than those with better core literacy skills who struggle with self-management, self-direction skills. In this connection, we have also often observed how important an empathic relationship between facilitator and learner can be, noting significant changes in behaviour as individuals begin to understand that they are in a safe, supportive and trusting environment. We make a conscious effort to convey this awareness to our learners and help them improve all facets of their “literacy” skills. At the same time, we have wanted to find a way to measure the growth of SMSD skills so that we could eventually track their relevance to learner “success” and improve the ability of our program to strengthen them.

Project Goal

Our goals in this project were to:

- develop a tool that would measure and track changes in learners’ SMSD skills, therefore help to incorporate SMSD-related goals into learners’ training plans
- contribute to the dialogue on the importance of these “softer” skills in the discussion of accountability, while making the necessary data collection as easy as possible for our staff

To achieve these goal, we planned to pilot the tool at QADS (Belleville and Trenton), as well as liaise with two other community based literacy agencies (preferably receiving United Way funding) to pilot our tool and process.

Research Questions

The project was informed by three research questions:

- How do we recognize, measure and evaluate changes in self- management, self-direction (SMSD) skills in literacy learners?
- How do we show that SMSD skills are as important to achieving “success” within the formal education/training and employment streams as the more traditional literacy skills?
- How does the tool we developed to measure SMSD skills link with the United Way’s Outcome Measurement Model (UWOMM)?

Connection to Accountability

The *Connecting the Dots: Literacy and Accountability* project (CtD) was the perfect opportunity for QADS and United Way of Quinte to contribute to the larger discussion of accountability, while working on using the UWOMM to measure learner progress in SMSD skills. We believe that we have contributed to all three of the CtD goals.

1. *To consolidate and exchange knowledge and information about current accountability policy and practice in adult literacy from Canada and abroad.*

We know from both our participation in the field review portion of the CtD project and in the symposium in Montreal that our questions and discussions about the importance of SMSD skills are not unique to our agency. We therefore completed a literature review on the subject to better understand these more “nebulous” skills that literacy providers spoke of as being a key element to success. It was noted in the symposium that, “a definition of accountability is only as complete as a definition of literacy”. We wanted to contribute to the larger discussion on “what is literacy” as much as to the question of “how do we show we are accountable for what it is we say that we do”.

A major theme that runs through much of the literature on literacy and accountability is the importance of capturing the “qualitative stories” as well as the “quantitative results”. Much of this discussion focuses on the frustrations literacy providers experience trying to capture the subtle improvements in the lives of literacy learners that do not seem to be reflected in more traditional measures of literacy progress.

Particularly relevant to our research on SMSD skills is the work of Marina Niks et al, which addresses the issue of “agency” in all of its aspects, i.e. self-confidence, control, choice, self-awareness and reflection. As this work demonstrates, measuring agency is no straightforward matter — different people have different degrees and aspects of agency, and circumstances are important as well. What is clearer is that agency is “a powerful influence affecting people’s lives” (Niks et al 2001: 55-56). Other research exploring the development of SMSD skills questions whether they are in fact “skills that can be learned and transferred,” rather than “traits that are acquired through relationships with others”.

2. *“To find a common language between community and government funders to talk about accountability”.*

Our desire to find a way to translate SMSD skills into clearly defined learner outcomes that both the program and learners can strive for and measure is closely linked to CtD’s second goal. Finding the language to clearly state what it was we were trying to measure was definitely one of the project’s challenges. UWOMM provided us with the means to address this challenge.

This project was intended to provide the tools and resources to encourage dialogue primarily between four different groups:

Service providers and learners: Service providers must be accountable to their learners and learners must be trusted to take an active role in the achievement of long-term success. The use of assessment and observation tools creates an open dialogue between learners and facilitators/practitioners about the attainment of specific skills/traits and how they can help adult learners achieve sustained success.

Literacy service providers: As we heard time and again at the symposium in Montreal, service providers are looking for ways to tell their learners' stories and measure their progress. This project provides tools and background information to help service providers improve their interventions with learners, as well as more effectively share the results of the program with stakeholders. The tools might also be adapted for use with non-literacy agencies working with marginalized populations.

Service providers and United Way as a funder: United Way does not typically prescribe outcomes, but it does expect service providers to deliver on the outcomes that they have identified. This project allow funders like United Way to better understand the complexity of literacy by measuring its less traditional aspects. Perhaps eventually we will be able to demonstrate concretely that it is possible to develop these aspects through intervention and that there is a link between them and sustained success.

Service providers and government funders: Discussions of accountability during this project often underscored the need for these two groups to open their own dialogue and perhaps shift to a more mutually accountable relationship. The short term employment/further education goals of traditional government funders appear to be unrealistic unless other, less traditional skills are nurtured and encouraged. The funding silos created by the individual ministry mandates and outcomes complicates the holistic provision of service.

3. *"To build on this knowledge and use the language to develop innovative models that can satisfy the need and requirements of both providers and funders and improve accountability in positive ways".*

United Way of Quinte recently requested that all their funded agencies begin to track and report outcomes to: improve their effectiveness in helping participants, assure potential participants and funders that they produce results and show the general public that they produce benefits that merit support. United Way was already using an accountability language that we knew and understood and that most other service providers were familiar with. Their outcome measurement process of developing a program logic model and then choosing outcomes and indicators that flow directly out of it provided the flexibility we needed to define what was important to us and our learners. The UWOMM was also an appropriate approach because it provides a learning loop, not unlike action research, that appealed to us. It feeds information back into the process, offering findings that can be used to adapt and improve your methodology and programming.

Team Members and Roles

Project Manager — Marsha Roadhouse provided core support to the project. She liaised with the CtD project manager and other projects. She conducted the initial literature review and identified the most relevant readings. Marsha coordinated the internal pilots and tool development, recruited the external pilots and wrote the reports.

Practitioner-Researchers — Stacey McQuoid, Chris Pleizier and Cory Lloyd provided core support to the project. Their instructional expertise, practical outlook and genuine interest in our learners provided the anchor needed to hold firm to our original intent, as well as to the many hours of hard work that went into the development and

implementation of the tools. They also trained and were assisted by Gary McLeod, Allison Hadley and Derek Pratt for the final pilot.

Funder Representative — Brandi Hodge from United Way of Quinte provided the six modules of our Outcomes Measurement Training, clear direction and unending support. She could always be counted on to bring us back to research question or listen and provide guidance when we needed to “talk it through.” From the beginning, United Way encouraged us to look at what we believed to be important and supported us in trying to find a way to measure it. At no time during the project (even when some of the pilot results did not show the results we had hoped for) did we feel that United Way strayed from its commitment to following the guidelines for Incorporating Outcome Data in Funding Decisions.

Quinte Adult Day School and United Way of Quinte have had good communication throughout its funding relationship and that certainly didn't change throughout this project. Marsha proves to be very passionate about her program, her learners and her goals, as I must say I saw from most of the literacy staff who attended the symposium in Montreal as well.

Brandi Hodge, United Way of Quinte

Research Friends — Mark Gallupe, a Social Service Worker Professor at Loyalist College and Phil Jones a Statistician with the Ontario Early Years provided the theoretical underpinnings and research support for the project. They assisted us in deciding what our focus would be, clarifying and rewriting our outcomes and indicators, improving the validity of our tools and rolling up the data we had collected into our indicator statements.

Additional Team Members — Jenn Bishop provided design and technological support, including tool design, creation of the scoring spreadsheets and assistance with data collection and analysis. Doug Miles, Board representative, attended our training and many meetings, providing valuable insights from his own experiences. He updated the Board monthly on progress and will assist us in the final phase of using our findings to inform and guide our upcoming strategic plan.

Project Summary

Methodology

In constructing a tool that would assist us in developing and measuring SMSD skills in our learners, the project built on existing tools and aids, primarily the Ontario Literacy Coalition's *Level Descriptions Manual*, the Conference Board of Canada's "Employability Skills," Service Canada's "Essential Skills" and "What Works: Recruitment and Retention of Ontario Works Clients Phase Two" (Report 2001). We also had many discussions with United Way, QADS staff, Board and learners, a research consultant and a statistician to help with the tool as well as the data collection process.

The methodology behind the project included the following components:

- a literature review on SMSD skills
- training in UWOMM
- creation of a logic model and identification of outcomes and indicators
- development of an observation sheet (linked to the Essential Skills), learner scan and activity log to support the assessment and development of SMSD skills
- preparation of Time Management/Goal Setting workshops and compilation of "intervention files" for each of the skill areas identified

- development of attendance and scoring sheets for use with common software to record and organize data
- development of instruction sheets so that other agencies can pilot our tools and offer feedback
- two pilots — employing the tool with learners
- organization, analysis and evaluation of the data

Research Findings

First Pilot

A total of fifteen learners from QADS' two sites commenced the First Round Study. The completion rate was 72.23 percent (eleven learners were included in the final analysis). The issue of non-completion of both the pre-test and post-test was addressed by changes in subsequent testing rounds.

The original tool was composed of seven indicators:

- Self Confidence Building
- Adaptability
- Personal Advocacy/Self Motivation
- Self Assessment/Self Reflection
- Continuous Learning
- Working With Others
- Time Management
- Time Management

Learners self reported using the options: Easy for me; Hard for me; Don't Know/No answer. They completed the scan at two separate points while at the QADS (an initial scan and then again after six weeks of training)

A review of average scores on each indicator reveals interesting results. In Belleville, all the scores are positive, which suggests that clients believed their abilities improved or at least remained the same between the pre- and post-test.

The results of our first pilot prompted a number of changes. Specifically, we:

- split our logic model into two — one to represent the CtD project and one to be developed further for our MTCU programming (also agreeing that we should have another logic model for the organization as a whole)
- split our tool into two — one to address time management, organization and goal setting for those needing to concentrate on the most basic self direction skills, and one to address the more “nebulous” self management skills for those that are already reasonably self-directed
- revamped and simplified our outcomes — moving from two broad to four more specific outcomes, linked to clearer, simpler indicator statements
- moved from a six point to a ten point scale — to increase variability because of the shorter piloting period
- removed the “Don't Know” option — to force an answer
- removed the headings on the categories — so as not to lead the learner
- changed the scoring to include negative statements — to force the learner to read and think about each item
- added a spot for the learner to make comments and suggestions
- implemented time parameters to guide the process — to reduce or eliminate non-completion by learners of the second scan

Second Pilot

The second pilot involved six youths in our Skilled Trades Exploration and Preparation program.

As a result of our second pilot we made the following changes:

- addressed a scoring issue that we had not identified before starting the second pilot
- revised the electronic scoring sheets — to capture qualitative data from learner comments on the learner scans as well as from the quantitative data
- recognized that we needed to remove the learner names from the scoring sheets — to protect their privacy (perhaps replacing names with IMS Code Numbers)
- identified the need to clarify the scoring sheet instructions and develop an overview of the project, instruction sheet and package for use of the tools themselves

What the Project Accomplished

Our funder identified capacity building as a key area to which this project has made a significant contribution:

The whole United Way movement is shifting its focus from being strictly fundraising organizations to capacity builders. Working on this project, while outside of the traditional scope of my responsibilities, has been very rewarding. I believe strongly that the United Way brand lends itself to increasing the capacity of the social service sector and if we think outside the box, working on projects like CtD can provide valuable tools and resources that can be used community wide.

Brandi Hodge, United Way

The importance of the tool developed by the project is also noted:

The tool that we have created with the CTD project can easily be applied to non-literacy agencies who work with marginalized populations toward the achievement of self-management self-direction skills; homeless shelters women's organizations, those who work with at risk youth, etc. The benefits of working on this one project could have far-reaching advantages with the social service sector as a whole.

What We Learned from the Project

We are only starting the process of “using our findings.” Much work remains (see Next Steps below). That being said, what we have learned and begun to use is astounding. Our learning is best summarized by linking to the original research questions that informed the project:

- *How do we recognize, measure and evaluate changes in SMSD skills in literacy learners?*

Most of what we learned about the development and challenges of creating outcomes, indicators and tools for collecting the data is laid out in the **Research Findings** section of this report, which also conveys the many times we adjusted our work plan and research as a result of this learning. As primarily a service delivery agency, it was much

easier to stay true to and understand the importance of trying to articulate this goal. Our learning facilitators/practitioners saw this aspect of the project as the part that mattered.

On a program level, we have already started to include SMSD goals in learner training plans and we are speaking the language of these skills in the classroom on a more regular basis. We have given conscious thought to the need for specific “interventions” that relate to SMSD skill development in the classroom as well as in our “embedded” learning programs. We have considered their relationship to and difference from the Essential Skills. We now recognize the necessity of addressing self-direction goals first. Until the learner has committed to change, the practitioner is unable to develop the “relationship” necessary to facilitate change in the more “nebulous” self-management skills.

- *How do we show that SMSD skills are equally important to achieving “success” within the formal education/training and employment streams as the more traditional literacy skills?*

Demonstrating the importance of SMSD skills as a foundation to success across all goal paths turned out to be much more challenging than strictly showing acquisition of and/or improvement of the skills themselves. Isolating our interventions from outside influences to determine and distinguish “intermediate” and “long-term” outcomes also continues to be a challenge. As a result of the project we have started to make a follow up calls at the one year mark as well as three and six months to see if we can make stronger linkages/correlations to the second question in the future.

- *How does the tool that we developed to measure SMSD skills link with the UWOMM?*

We learned a great deal about the UWOMM and the process of Action Research itself. Focusing on outcomes — on why we are doing what we are doing and how we think learners will be benefit — gave us a clearer picture of the purpose of our efforts. The importance of everything flowing out of our logic model did not become really clear until we neglected its significance to the overall project.

We learned that the logic model needs to be very specific and flow directly out of the agency’s mission and value statements. Initially, we attempted to include all of what the agency does in our logic model, which made it difficult to identify, or more accurately, isolate the specific outcomes and indicators related to SMSD skills from our core literacy services. Separating the two make it easier.

While we regret “lost time,” it is perhaps in the detours that much of our learning occurred. We are confident that this clarification alone will lead to more focused and productive service delivery.

On an organizational level, we have identified that using the same process to develop an organizational and MTCU program logic model will be a necessary part of our next strategic planning process, beginning next February. We also hope that, in sharing our tool and what we have learned with others, we will be able to continue the dialogue and learn from others about their experience.

And perhaps most importantly of all, we have learned that the outcome measurement process, like action research, is not about “fixing things” or “getting it right.” Rather, it is

more about accepting that perhaps there is no “perfection” and that we will have to settle for “just getting better” and “learning something new”. We have learned that the our practice of looking beyond the day to day outputs, of struggling to find the right ways to improve the effectiveness of our programming and persisting when we are discouraged makes us special — because that **is** what both outcome measurement and action research is all about.

Relationship with the Funder

United Way of Quinte was the ideal partner to explore the definition of accountability suggested at the Montreal symposium, “a collaborative relationship, based on a mutual obligation.”

Collaboration is often mistaken for networking: collaboration in its truest form means to work, one with another, toward a common goal. Our project was a true collaboration between the agency and the funder, and together with additional partners identified along the way, we achieved a common goal. I believe we will continue to work on it beyond the deadline of this project.

Brandi Hodge, United Way

As a philanthropic funder, United Way builds a different kind of relationship with service providers than what we encounter otherwise. With United Way, we tend to be partners, rather than funders/fundees. The project underscored this collaborative relationship, while also highlighting some important aspects for United Way, as Brandi Hodge discussed:

The complexity of the literacy sector —

Honestly, I tended to think of literacy in its traditional form, and while this learning doesn’t speak directly to the CTD project, it certainly speaks to the importance of projects like these, to advance conversation between those who are fully immersed in any movement and those who are standing on the sidelines as funders.

The accountability relationship —

The relationship around accountability has to be mutual and reciprocal...we need to be just as accountable to our agencies as they are to us as funders and this requires a commitment on our part toward truly understanding who their clients are and what challenges they face.

Finding ways to be more accountable —

Outside of this project, it also highlighted an opportunity to be even more accountable to our donors than ever before... it was often said that the skills and stories that we focused on in this project weren’t measurable, that there are so many intrinsic benefits of the development of these skills that they can’t be measured. However, now we know it can. We’ve developed a tool that says we can and while that tool needs some tweaking, it will give us the resources that we need to ensure that we are funding programs that are doing what they say they are doing, efficiently and effectively.

As our outcome measurement process closes its full loop, our relationship with United Way feels more secure than ever. They have an even better understanding of our clientele and the challenges we face in serving them as well as a deeper understanding

of the community's need for literacy services. For our part, we are much more aware of the need for clearly defined goals that we can be accountable for and the challenges inherent in trying to measure intangible outcomes in a systematic way.

This is not to say that our work is done: indeed we are just starting. There will be challenges in the future as we strive to refine our process and improve our results. Our tool will be modified, improved and maybe even reinvented as the Outcome Measurement process of piloting and implementation continues, before it can be used full scale. But, it has created a springboard for all of this to happen. We are confident that United Way of Quinte will follow the "Guidelines for Incorporating Outcome Data in Funding Decisions" in supporting us as we do so (See Appendix A). For our part, we will endeavour to provide them with the results they need to retain their current donors and attract new ones.

The outcomes measurement process is one we are fully committed to and one that is mandatory training for all United Way funded program. Processes to increase accountability, between all players in and sector are vital to creating efficiencies and increasing capacity.

Brandi Hodge, United Way

Challenges

We faced various challenges throughout the course of this project. From a broad perspective, the Action Research process itself tried and pushed us, as our funder aptly expressed:

This project truly reflected the cycle of action research: plan, action, observe, reflect...then revise plan, action, observe and reflect again and so on. While this is the process, and a good one, that led to the development of the tool, it also became our challenge... the plan changed so often; it sometimes led to losing focus of the intended goal. I know that Marsha and her team experienced many more hands on challenges, such as the time to implement pilots; however from my perspective as funder, who already views the outcome measurement process as action research, this was the greatest challenge.

Brandi Hodge, United Way

More specifically, we had to contend with the following demands:

Defining and clarifying our research question was one of our biggest challenges. We were surprised at how difficult it was to articulate what exactly it is we do and our expectations of our learners into clear and measurable statements. Our mid-term report discussed this issue in more detail, outlining the changes we made to our original question and objectives by mid-term. Our third goal, which involved our relationship with our funders, would again be revised with the arrival of the statistician and resulting changes to our logic model, outcomes and indicators. Our third research question went from "How do we identify the parallels and similarities between our SMSD outcomes and indicators with MTCU's Learner Skills Attainment framework to collect and analyze data of value to both funders?" to "How does the tool that we developed to measure SMSD skills link with the UWOMM?"

Articulating the intermediate and long-term outcomes for our project continues to be a challenge.

We only do "official" follow up calls at three and six months, both of which would yield what are considered "intermediate" outcomes. The questions we ask are narrow as per

what constitutes “success” and are not sophisticated enough to isolate outcomes directly related to our “literacy intervention” from outside influences. However, they still provide us with some good information regarding intermediate outcomes. We have started to make follow up calls at the one year point as well, in the hope of identifying more specific long-term outcomes.

The very definition of what “success” constitutes has been a challenge.

We never escaped from defining “success” primarily by the definition used by MTCU.

Finding a common language to articulate the SMSD skills was also difficult.

Since we wanted to link as much as possible with MTCU's Learner Skills Attainment Initiative, we initially planned to articulate the SMSD skills using four of the Essential Skills (oral communication, working with others, continuous learning and thinking skills). We found this difficult however, for two reasons. First, we struggled to fit concepts like self-confidence and self-reflection within the essential skills categories. Second, we realized that the Ontario Literacy Coalition's SMSD outcomes measured the skill level of the learner, while the Essential Skills are a measure of the complexity of a specific task.

Using clear language on the learner scan that could be understood by lower level learners and still capture the complexity of the concept was challenging (as expected).

We simplified several items after our initial pilot phase. The final version of our tool is electronic to reduce data inputting time, although it can be printed for those who are more comfortable with pen and paper. Beyond language use, we had similar discussions about learner comfort level with computers. There seems no way to get around the fact that lower level learners will need assistance.

Time constraints

The time constraints of the CtD project influenced the duration of our pilots and therefore how we administered and used the tools as well as the design of the tool itself. In some ways, this was good because it forced us to get things done and keep the project moving.

Recommendations

The learning has been so rich it is hard to speculate what we should have done differently. Potential improvements would probably include:

- having the statistician on board from the very outset of the project
- keeping the focus much narrower and the goals much more realistic in scope
- allowing more time
- taking better notes and organizing our work better and sooner
- keeping our tool simpler and perhaps basing it on the “Work Habits” rather than the SMSD skills, so it had a closer tie to the Essential Skills

Next Steps

We plan on continuing our research past the CtD deadline for two reasons:

First, we want to complete the full United Way Outcome cycle, which includes training and plans for “Using our Findings.”

Accountability is not simply about measuring things, it is about using what we learn from measuring things to guide and inform the planning process and program improvements.

We hope to make a link between measuring data at the program level and how we use that information at the governance level to demonstrate and articulate accountability related to our outcomes. Developing a baseline on which we can build our data was only the first step; now we have to find a way of linking the data to “successful” learner outcomes down the road.

A major principle underlying the UWOMM is use of findings generated by data collection to guide and direct future program planning. This step will contribute to our original research by helping us answer the following questions:

- Are there unintended outcomes from our research that we should be capturing?
- How should/will our results influence our program improvement plan?
- How can we use our research findings to enhance our public image and attract a new client demographic?
- How will the data inform our 2010-2113 strategic planning process?

Second, we would like to pilot our method and tools with several other literacy agencies. The extensive revisions after our first internal pilot meant that we had to do a second pilot in-house to work out some of the problems the statistician identified. The additional testing and refinement of the tools we designed to measure progress on our indicators is part of the continuous improvement process built into the UWOMM. Both United Way and the statistician assured us that this was the point of a pilot and part of the outcome measurement process. Nevertheless, the need for a second in-house pilot prevented us from soliciting feedback from other organizations within the time allotted by the CtD project.

We feel that this external input is an important part of the process and that gathering objective feedback is an integral part of achieving the goals of our first research question. If the data collected by our tool is to guide our future program changes, it would be reassuring to know that the tool is adaptable and valid across other learning environments. The opportunity to gather input and feedback from others in the field will allow us to explore the following questions:

- Do others agree that SMSD skills are worth measuring?
- Do other programs find merit in using the Observation Tool as an opportunity to approach “sensitive issues” with their learners?
- Have we reflected the skills/characteristics other practitioners would want to measure (feedback from “fresh eyes”)?
- Are our instructions clear enough for others to follow and the process easy enough that they will bother (adaptability)?
- Do the tools and data analysis capture what we are trying to measure (i.e. validity)?
- Can we actually measure congruence between the learner scans and the facilitator’s observation sheets?
- How difficult will it be to “roll up” our data into our indicator statements on our own with the help of our statistician? Can we adapt our scoring sheet to do this for us too?

Appendix A

Guidelines for Incorporating Outcome Data in Funding Decisions

- Provide sufficient time (a year or more) to develop and test outcome measurement systems before launching full-scale implementation.
- Implement a “hold-harmless” period during which outcome findings have no bearing on funding decisions to allow managers time to make program adjustments based on their first outcome findings.
- Focus on whether managers are making good-faith efforts to measure their outcomes, rather than on the measurement results themselves, when initially including outcome issues in funding considerations.
- If outcome findings eventually are considered in funding decisions, do not consider outcome data in isolation as a measure of a program’s worth. Other factors such as number of participants, participant characteristics, staffing resources, service costs, and level of service combine with outcome data to explain the value of a particular program.
- Do not make assumptions about what level of performance constitutes a “good” outcome for a program. Without one or more rounds of experience with outcome measurement, there generally is not a sound basis for making this judgment. Even comparisons with similar programs are problematic unless the agency is sure that the compared programs serve comparable populations.
- In evaluating outcome data, focus on whether findings show program improvement from cycle to cycle rather than on how outcomes of one program compare to those of another, or on whether outcomes meet some ungrounded, intuitive target.

Measuring Program Outcomes: A Practical Approach
United Way of America

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