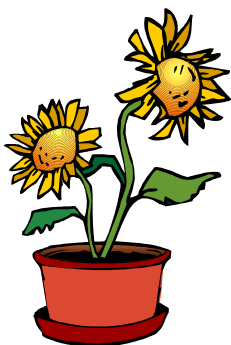


# Our Voice



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## The Dreaded AGM

Source: *The Association Consultants Report, Summer 2001*

A chiropractor friend related how his sister, who is the president of a tennis club in western Canada, was dreading the club’s annual meeting. It seems that the club members have come to call their AGM “the hanging.”

The name came from the fact that for many years this meeting has seen “the downfall” of successive presidents who have been embarrassed, humiliated, angered, distressed and/or reduced to tears by nitpicking, self-appointed meeting “experts” who hung them out to dry.

It would be nice if those of us who don’t play tennis could excuse this situation as an aberration—something peculiar to tennis players who spend too long in the summer sun and become high strung. We know however, that this isn’t so. We have personally been at meetings where people shouted at each other, we have witnessed a fist fight, seen a chairman cry, and observed members whose feelings were so hurt that they left never to return.

These are some of the reasons that prompted the writing of **CALL TO ORDER**, a book of meeting rules that make sense for associations. It’s interesting to recall that in a radio interview in 1984, we said “Associations are not parliament. Conducting an association meeting using parliamentary rules would be like a tennis match played with baseball bats.” We concluded our interview by saying, “Small wonder that members hate meetings and chairpersons are confused, unsure and open to intimidation by self declared parliamentary experts.”

Needless to say, we gave our friend a copy of **CALL TO ORDER** to send to his sister. We recently received a nice thank you note from the happiest president that tennis club has had in years.

Looking to take the dread out of your AGM? **CALL TO ORDER** is available from Big Bay Publishing Inc. Order by phone at (519) 376-9578 or by fax (613) 592-1407. Cost per book is \$14.95. Quantity discounts are available.



# A Success Story

## Screening and Ontario Works

By Karen McGregor, Literacy Assessor at Ontario Works, Kingston Literacy

**Initial Screening and Ontario Works** is a pilot project sponsored by Kingston Literacy and funded by the National Literacy Secretariat and Ministry of Training Colleges and Universities. Phase 1 ran from September 1999—July 2000, with Phase 2 ending August 2001. Its purpose was to identify how literacy screening could “fit” with Ontario Works and how literacy programs and Ontario Works could work together to develop tools and protocols in order to deliver smooth literacy service in the Kingston area, and to develop a model which outlines how initial screening and Ontario Works operates in our community.

With the changes in policies affecting upgrading opportunities due to the introduction of Ontario Works, Kingston Literacy was quick to explore the idea of literacy screening at Ontario Works. When presented with this partnership concept, the Manager of Program Delivery with Ontario Works realized its potential benefits and expressed her support. The next step was to solicit support from the LSP (Literacy Service Plan) partners. As a result of their support, the preliminary project application was submitted on behalf of the LSP.

At the time Karen McGregor was supposed to officially start as Literacy Assessor, the City of Kingston employees (CUPE) were in the 4th week of a strike, which lasted over six weeks. As a result, upon returning to work, employees were more concerned about managing the resulting back-logged case loads than in hearing about a new literacy assessment project.

In spite of this, the Manager of Program Delivery arranged brief meetings with each of the six Ontario Works teams. These meetings were to last about 15 minutes and were scheduled either at the beginning or at the very end of the workday. The first meeting Karen held, in fact took place on a Friday evening at 5:45 p.m.! Imagine the challenge!

Surprisingly, the response was positive. Case Managers agreed that they were not comfortable with screening their clients, and many asked questions about available programs and supports. But thankfully, at the end of all six meetings, the question was, “Karen, how soon can you start?”

Another factor influencing the beginning phase of the **Initial Screening and Ontario Works** project was the lack of available space at the Ontario Works office. Renovations had already been done to make more office space, to the extent of renovating storage closets, and there was not any space left for a literacy assessment office! To solve this problem, staff on the first floor who had flex days agreed to let their offices be used for literacy assessments.



A rolling trolley was provided for all the “Assessor’s Equipment”, and before long, a schedule was established so that desk-side assessments could start. Immediately the referrals started pouring in. To handle the flow, seven assessments were scheduled each day, with the expectation that a few people would not show up. Case Managers had picked up the ball with ease!

After Karen held the initial information sessions with each of the six OW teams, considerable time was spent trying to identify the key issues and barriers around referring clients for literacy assessment. Some of the issues that Case Managers had were:

1. *How could a Case Manager identify literacy needs?*
2. *How would they refer them to Karen McGregor (phone, email, letter,...)?*
3. *Where would the assessments take place?*
4. *How would the Case Manager get the results?*
5. *Who would track attendance?*
6. *Who would notify Case Managers of changes to the training plan?*

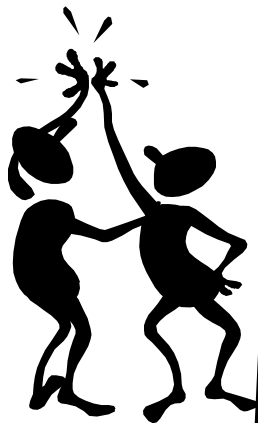
All of the questions and concerns were documented and every opportunity was taken to discuss possible suggestions and implementation ideas. Some of the most fruitful conversations took place in the lunch room!

Another promotional activity conducted by Karen was job shadowing an experienced (13 years) Employment Coordinator for several days. This was an excellent opportunity to truly understand the day to day trials and tribulations of an Ontario Works Case Manager. Not only did it provide a better sense of how information travels within the organization, but it also provided a great opportunity to meet individual Case Managers, learn their names and talk briefly about the nature of their case loads.

Once space had been designated for literacy assessments to take place, posters were put up in each of the 26 interview rooms to promote the service to clients and to remind staff that they could refer clients directly for assessment. All Case Managers had another flyer in their cubicle which identified where assessments would be conducted over a two week period and a selection of several phone numbers to call for access to the Assessor.

There were a variety of reasons for choosing to deliver an assessment service on-site. Prior to Ontario Works, Case Managers were familiar with only a few of the programs in the community. They would suspect a need for upgrading and refer the client to what they considered to be the appropriate program. The client would seek out the program and register. Having an Assessor on-site, who is familiar with all programs in the community, dramatically improved the chance of a participant getting to the right program first. And having the Assessor on site for the benefit of Case Managers was also an asset. **A consistent message in OW training is that “appropriate referrals” are critical.** Getting ongoing feedback from the Assessor assured Case Managers that they were making referrals that were appropriate.

As well, with transportation a barrier to many OW clients, it seemed to make sense that, once a client was referred for a literacy assessment they wouldn’t have to go to another location. Ontario Works clients are familiar with the OW building, and the transportation routes to get there.



In addition, by having the Assessor on-site the client was able to access all the support services at the same time; Children's Services (childcare), Employment Placement and Community Placement were all located in the same building.

Finally, Kingston Literacy had discovered, as a result of their assessment role at HRDC that clients were likely to go for a assessment if they were referred by someone in the same building. Even if the assessment was for another day, they usually could "check out" the Assessor and assessment office to find out how scary they were.



## Outline of the Assessment Tool

The assessment tool used for this project was developed through a series of phases. Kingston Literacy has significant experience completing initial assessments through the *Labour Adjustment Initiative*, *Workplace/Workforce Employment Basic Skills Initiative*, co-developer of the original CABS (Common Assessment of Basic Skills), and full-time assessment at the *Employment Resource Centre*.

Basically, the assessment tool is an informal assessment which meets the following criteria:

⇒ **Brief**

The assessment and referral are completed within one hour.

⇒ **Informal**

The participant is encouraged to relax, be comfortable, talk freely about their education history and what they'd like to learn.

⇒ **Informative**

It allows the Assessor to gather information that will be helpful in determining the best program for the participant. It provides important information for the participant to help them make knowledgeable decisions based on their employment goal.

⇒ **Constructive**

The process is used to determine realistic goals for education and employment that meet the participant's needs. It also highlights what the participant does know; often standardized tests cause anxiety and don't capture or portray the best possible results.

⇒ **Demonstrates**

The participant is asked to read aloud from a passage that the Assessor has determined the client will be able to read successfully. Comprehension is measured by a series of questions and discussion. A math demonstration indicates to the Assessor and the participant which operations the participant is comfortable performing and any that may need a "brush-up".

⇒ **Encouraging**

By the end of the session, once an appropriate program has been recommended, the participant should feel keen to embark on a new adventure, aware of basic information about the program they will be attending, and feel comfortable calling the Assessor back if they have any questions or concerns.

## Promotional Activities:

Once situated on-site it was important for the Assessor to build rapport with the Case Managers. It was important that they feel comfortable calling the Assessor at any time to ask questions about programs or about literacy assessment issues.

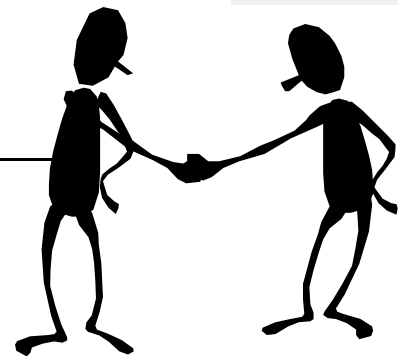
A number of activities were planned to make the Assessor an identifiable component of the Ontario Works office. They were also intended to make workers aware that numeracy was also a part of upgrading.

- ⇒ A large jar filled with candy was placed in the staff lunch room for an “estimate how many candies are in the jar” contest. The contest lasted two weeks. There were more than 100 guesses! The winner won the candies.
- ⇒ A large jar filled with candy was circulated around the building. “Guess the weight of the candies and jar using grams.” (“Grams” caused quite a stir!)
- ⇒ Candies were attached to all assessment reports and questionnaires
- ⇒ The Assessor met frequently in the lunch room with staff to build rapport
- ⇒ The Assessor volunteered to coordinate the coffee fund
- ⇒ The Assessor volunteered to proof read documents going out to clients on a general mail-out
- ⇒ The Assessor participated in staff fund-raising activities

Four partners are represented at the regional LSP. There are currently seven literacy programs operating in the Kingston area under the direction of these partners. Each partner has a designated Assessor who does intake for the programs and ongoing or in-depth assessment. Once each month the Assessors meet with the Literacy Assessor at Ontario Works. The meetings address a number of issues:

1. Are referred participants getting to the programs?
2. How many “seats” does each program have available?
3. What levels are being served?
4. What new program highlights should Assessors know about?
5. Assessor Professional Development
6. To address issues forwarded to the Assessors from the LSP
7. To forward assessment issues to the LSP

In addition, the Literacy Assessor at Ontario Works speaks with individual programs on a daily/weekly basis when making participant referrals. Also, site visits are made regularly. It is important for the Assessor to be kept up-to-date on location, schedules and levels for each program.



In September 2000, the OW Employment Services Division relocated, allowing space for an Assessment Office! Also, a literacy icon was placed on the desktop of ALL Ontario Works computers. By clicking this icon Case Managers opened an appointment schedule for up to six months in advance. With their client sitting in front of them, the Case Manager could book an appointment, give the client an appointment card, and allow the Assessor to better prepare for the assessment with some of the critical information provided in the “Notes” Section.

Upon completion of the assessment, an email is sent to the Case Manager to inform him of what the assessment indicated would be the most appropriate program for the client. The assessment report is faxed to the program, while the original stays with the Assessor. The Case Manager is responsible for completing the “data mapping” on the OW computer system, and for following up with the client on issues such as transportation allowances and attendance concerns. Periodically the Case Manager may contact the Assessor to find out more information. All in all, the process is working tremendously well, and feedback from Case Managers indicates they are delighted with the service.

As we wind down over the summer holidays, we are about one week away from awarding our latest prize. To celebrate the 600<sup>th</sup> assessment completed since the beginning of this pilot, we are awarding a prize to the Case Manager who makes the referral for the 600<sup>th</sup> assessment.

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### Highlights of the “Initial Screening and Ontario Works” project include:

- ⇒ 900 referrals for literacy assessment
- ⇒ 600 completed assessments
- ⇒ An increase in the number of clients making their way to literacy programs
- ⇒ Better understanding of literacy programs and services by Ontario Works staff
- ⇒ Better understanding of how Ontario Works operates, including training expectations and protocols for clients to follow. Literacy program staff had often received mixed messages from clients about Ontario Works expectations.
- ⇒ Increased literacy awareness for Ontario Works Case Managers. Many now feel more comfortable asking key screening questions.
- ⇒ As a result of this project newly hired Case Managers and Aides are provided with two hours of “literacy training” by the Assessor. The response to this has been positive. OW staff expressed their approval for this training, and the resulting referrals were made with confidence.
- ⇒ Literacy Assessors use the language of the matrix with confidence. Training plans are outcome based, and instructors have a clear sense of the levels at which their students are working.

The Literacy Assessor and the assessment process are now considered as a valuable resource for Ontario Works. Case Managers rely on the service and trust that their clients are getting a positive opportunity to upgrade their skills. Communication continues to play an important role in the ongoing partnership, and the willingness of both Ontario Works and literacy staff to work together will make future developments stronger.

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**For information contact  
Karen McGregor at  
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**CLO is still accepting registrations for the Celebration of Literacy Volunteers Conference!**

In honour of the International Year of Volunteers, Community Literacy of Ontario and Laubach Literacy Ontario are proud to be sponsoring an exciting conference. **"A Celebration of Literacy Volunteers Conference"** will be held at the Toronto Colony Hotel from October 18 – 21, 2001.

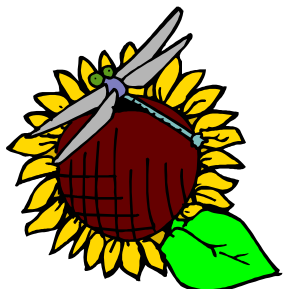
We gratefully acknowledge the generous support of the Ministry of Training, Colleges and Universities and the National Literacy Secretariat for this event.

If you are interested in attending this conference or for more information, please contact Jette Cosburn at 705-733-2312 or email [cosburn@bconnex.net](mailto:cosburn@bconnex.net).

## WORKSHOPS AND OTHER EVENTS

- ⇒ **Volunteer for the Health of It** (*Linda Graff, Graff and Associates*)
- ⇒ **Selection & Recruitment of Board & Committee Members** (*Ginette Johnstone, Johnstone Training Consultants*)
- ⇒ **Ethical Approaches for Volunteer Involvement** (*Liz Weaver, Volunteer Centre of Hamilton & District*)
- ⇒ **Avoiding Burnout: Keeping the fires bright** (*Reva Cooper, Reva Cooper Consulting*)
- ⇒ **The Math Kit** (*Karen McGregor, Kingston Literacy*)
- ⇒ **Link & Think: The New Technology of Connecting** (*Donna Messer, ConnectUs Communications Canada*)
- ⇒ **Gala Dinner & Reception** (*Keynote speaker, Dave Broadfoot*)

**CLO gratefully acknowledges  
its funder: the Ontario  
Ministry of Training, Colleges  
and Universities**



### **CLO's Board of Directors**

- **Debra Barrett (Toronto)**
- **Laurie DesLauriers (Napanee)**
- **Betty Ffrench (Sault Ste. Marie)**
- **Jan Goatcher (Ottawa)**
- **Margaret Maynard (Beamsville)**
- **Dan McGibbon (Barrie)**
- **Johanna Pax-Milic (Toronto)**
- **Valerie Sadler (Hamilton)**
- **Penny Smith-Jensen (Dryden)**
- **Lee Torvi (Renfrew County)**
- **Dan Woods (Halleybury)**

### **CLO's Staff**

- **Joan Beaudry—Administrative Assistant**
- **Jette Cosburn—Co-Executive Director**
- **Joanne Kaattari—Co-Executive Director**
- **Vicki Trottler—Volunteers & Assessment**

## **Board Café**

Ask your board members to surf on over to "Board Café" at [www.boardcafe.org/](http://www.boardcafe.org/)

This informative website includes an electronic newsletter exclusively for board members. "Short enough to read over a cup of double espresso with whipped cream, the 'Board Café' offers a menu of ideas, opinions, news and resources to help board members give and get the most out of board services".

Articles are short, engaging and topical. Past articles include:

- ⇒ What are the laws on conference call board meetings?
- ⇒ The board's role in personnel
- ⇒ Conflict on the board
- ⇒ A board / staff contract for financial accountability
- ⇒ What do you like to get in a board packet?
- ⇒ Learning from the oldest nonprofits

"Board Café" is co-published by the National Centre of Nonprofit Boards and CompassPoint Nonprofit Services.



## **CLO Staff**

Community Literacy of Ontario has moved to a "Co-Executive Director" model until June 2002. Joanne Kaattari will be working on various International Year of Volunteers projects as well as working as Co-Executive Director. Jette Cosburn will serve as Co-Executive Director and Office Manager.

This innovative staff model will help CLO to manage its many projects and initiatives. Both Joanne and Jette are really enjoying the current cooperative model. CLO is also very pleased to welcome Joan Beaudry as our talented Administrative Assistant and Bookkeeper.