Learner Plan Development

Getting Down to Basics: Service Delivery in LBS Agencies
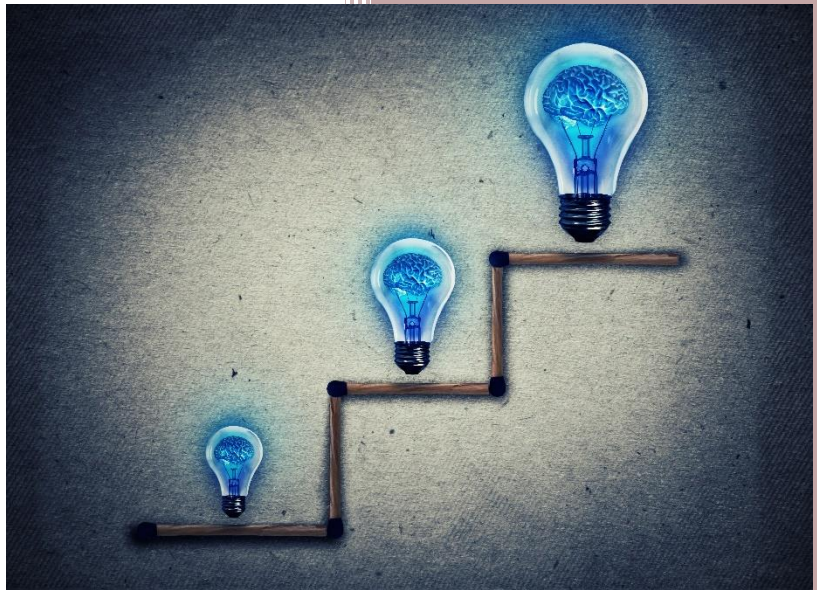
COMMUNITY LITERACY
OF ONTARIO

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Disclaimer:
All information and URLs were accurate at the time of publication. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.

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CLO's Getting Down to Basics: Service Delivery in LBS Agencies
Chapter Four – Learner Plan Development

Introduction

This chapter takes a close look at the requirements, practices and tools associated with Learner Plan Development (LPD). Learner Plan Development is another of the five foundational services provided by Ontario's Literacy and Basic Skills (LBS) Service Delivery Agencies (along with Information and Referral, Assessment, Training, and Exit and Follow-Up).

In this chapter, literacy practitioners (experienced and new) will find information, sample tools and resources and a review of the basics, if needed.

LBS Learner Plans are personalized plans of action designed to help practitioners and each learner set, manage and accomplish Literacy and Basic Skills (LBS) competency development goals.

Literacy practitioners will use the Ontario Adult Literacy Curriculum Framework (OALCF) to help with Learner Plan Development. To gain a general understanding of the OALCF, we suggest that you take a few minutes to review the OALCF Chapter of this guide.

LBS Program Services

1. Information and Referral
2. Assessment
3. Learner Plan Development
4. Training
5. Follow Up

YOU ARE HERE

Transition to Goal
Employment, Apprenticeship, Secondary School Credit, Postsecondary, or Independence
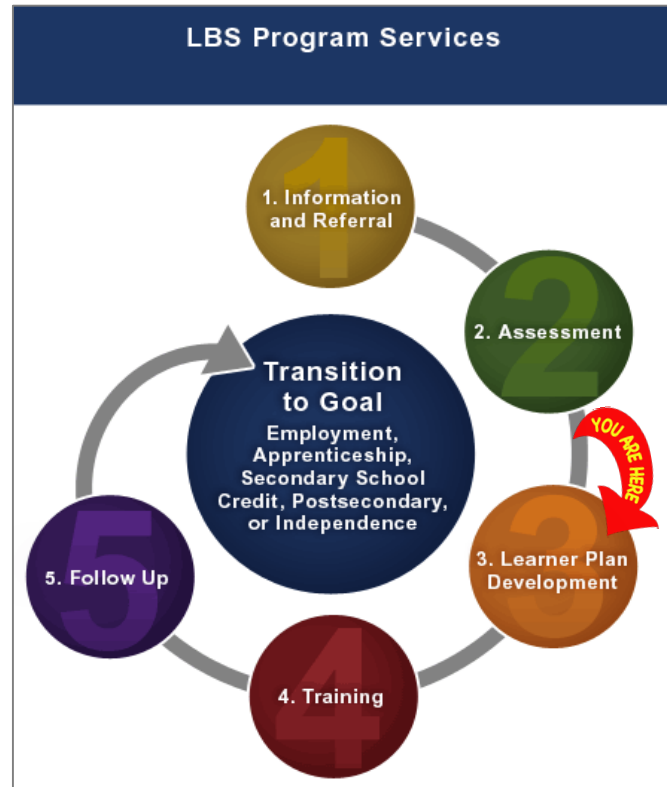
Ministry of Training, Colleges and Universities Requirements

MTCU has set a number of requirements that must be followed in relation to the Learner Plan Development service. These are laid out in the Literacy and Basic Skills Service Provider Guidelines. The Guidelines are updated from time to time and we recommend that practitioners check for newer editions.

"In order to develop the learner plan, LBS service providers work with the learner to identify and document the learning activities that prepare learners for transition to their goal. The learner plan ensures that learners understand the steps that are required to achieve their goal, the sequence for training and the time necessary to achieve the learning identified for their goal path." (*LBS Service Provider Guidelines,* effective October 2016)

The *LBS Service Provider Guidelines* provide the required process for Learner Plan Development and describe the information and details that comprise the learners' individual plans. For example, the Guidelines provide a list of the information that is required in a learner plan, which is a learner's:

- goal path
  - o The goal path refers to the preparation required to exit LBS and transition to the goal and is delivered by an LBS service provider. The five goal paths are: apprenticeship, employment, independence, post-secondary or secondary.
- goal
  - o The goal is what the learner wants to achieve once leaving the LBS Program.
- background information
  - o The learner's profile information that is included in the LBS Participant Registration Form
- assessment results
- milestone tasks
- culminating task
- learning activities
- program duration
- additional supports required by the learner
- referral results

The *LBS Service Provider Guidelines* describe in more detail what is to be contained within an LBS learner plan. "LBS Service Providers must:

- ensure that the learner plan
  - includes the background information gathered in the learner profile
  - identifies necessary referrals to be made after initial assessment, during or at program exit
  - identifies the learner's goal path
  - details the learning activities to be provided to prepare learners for their goal path
  - identifies milestone tasks related to the goal path that the learner needs to successfully demonstrate
  - identifies the culminating task
  - consider whether e-Channel delivery is appropriate for the learner
  - indicate dates and establish timelines (date the learner plan was developed, start date and projected end date for learner's program, estimated time per week learner commits to their LBS training which includes both supervised and independent study, and dates for the learner and LBS service provider staff to review progress)
  - includes any other non-LBS requirements (certificates, courses, abilities) of the learner's goal path "

The above information is required in all LBS learner plans, but service providers may gather more information if they require it for their individual program purposes or to serve the learner better.

MTCU requires LBS programs to use the language of the OALCF competencies and levels when developing learner plans. Milestone tasks and culminating tasks should also be included. By using the OALCF language and assessment materials, the learner plan will provide other stakeholders with an understanding of what a learner has achieved in your LBS program. This is important for transferability among LBS programs and for ease of transition to the learner's next steps if their goal is apprenticeship, employment or further education.

Regarding the Learner Plan Development process, the LBS Service Provider Guidelines say that LBS service providers must:

- work with learners to develop a learner plan that reflects what the learner needs for the goal path
- establish a process for regular and timely review of learner achievements, including successfully demonstrated milestones and culminating tasks, and other assessment results which indicate progress towards completion of the goal path. Periodic review of the learner plan ensures that the learner is on track with the learner's training objectives. If the learner

is not on track or if the learner's goal has changed, the learner plan is revised to reflect changes in learning activities and expected outcomes

- provide the learner with a copy of the learner plan and keep a copy on file
- make learner files (which include learner plans) available for review by Ministry staff

In the remainder of this chapter, we will provide more details about Learner Plan Development and offer tips and tools to help you to meet the MTCU requirements for developing learner plans.

Developing the Learner Plan

You have determined that your program is the right place for a client to be and you have completed an assessment for eligibility. Now, you will begin working on developing a plan to help the learner with their Literacy and Basic Skills (LBS) needs.

As noted in the previous section, one mandatory document in the learners' files is the LBS Learner Plan. However, Learner Plans are more than an administrative device to fulfill funding requirements. A Learner Plan is an important document that forms the learning agreement between the practitioner (instructor or tutor) and the learner.

In other educational fields learner plans may be called

- learning contracts
- learning commitments
- study plans
- learning agreements
- training plans
- self-development plans
- service plans (used in Employment Ontario as a generic term)

Learner Plans – An Important Component of Successful Adult Learning

Learner plans are key to successful adult learning. Involving learners in the development and follow through of a learning plan targeted to their goal, increases the likelihood of their investment in the learning process. The Learner Plan is the first step toward active learner participation in facilitated learning. When adult learners have control of their learning, they learn better.

Malcolm Knowles was a champion of self-direction in adult learning and andragogy. He defined andragogy as the process of **helping** adults engage in learning, as opposed to pedagogy which refers to the **teaching** of children. Androgogy shifts the spotlight from the teacher to the learner. If you are developing a Learner Plan for successful adult learning, you should consider Knowles' theories. They assume that adult learners have the following needs:

- **The need to know**. Learners need to understand the need to learn something – how it will benefit them if they learn it or what the consequences will be if they do not – before they are willing to invest time and energy in learning it. In the process of drafting a learning contract, learners are subtly challenged to think through why they are undertaking to learn something.

- **The need to be self-directing**. The psychological definition of an adult is "one who has achieved a self-concept of being responsible for himself or herself – whose self-perception is that of a self-directing person." When a person has arrived at self-concept, he or she experiences a deep psychological need to be seen by others and treated by others as being

capable of being self-directing. Contract learning at its best involves the learners in making decisions about what will be learned, how it will be learned, when it will be learned, and whether it has been learned, usually with the help of a facilitator or resource person.

- **The need to have the learners' unique experiences taken into account**. It is predictable that in a group of adults, the range of experience, both in quantity and in quality, will be greater than in a group of children. Because of their experience, adults have developed different styles of learning, different levels of operation, different needs and interests, different speeds of learning, and different patterns of thought. Hence the importance, particularly with adults, of providing highly individualized plans for learning. Learning contracts are almost always individualized plans for learning. Five individuals may have the same objective in their contracts and go about accomplishing that objective in five different ways.

- **The need to gear learning to the learners' readiness to learn**. Adults become ready to learn something when an experience in their life results in a need to learn it. Since the life situations of any group of adults are different, they become ready to learn different things at different times. Learning contracts provide the flexibility to enable learners to time their learning according to their readiness to learn.

> Malcolm Shepherd Knowles, Ed.D., (1913-1997) was an American academician and practitioner in adult learning and education. He developed and refined the principles of adult learning now known as andragogy. His writing has made a significant impact, internationally, on the practice of adult education and academic settings. He is widely acknowledged as the most quoted and cited adult education authority of his time. His writings include
>
> - *The Adult Learner: A Neglected Species (1973, 1978, 1984)*
> - *Lifelong Learning: A Guide for Teachers and Learners (1975)*
> - *Self-Directed Learning (1975)*
> - *The Modern Practice of Adult Education: Andragogy vs. Pedagogy (1980)*
> - *Andragogy in Action (1984)*
> - *Using Learning Contracts (1986)*

- **The need to organize learning around life tasks or life problems**. Adults have a task-centred or problem-centred orientation to learning, rather than the subject-centred orientation that is characteristic for children. Learning contracts enable learners to state their objectives in terms of tasks or problems that relate to their life situations.

- **The need to tap into intrinsic motivations**. Children and youth have been conditioned by their school experience to rely on extrinsic motivators – pressure from parents, teachers, and the grading system. Although adults respond to some extent to extrinsic motivators (wage increases, job promotions), their deepest motivation comes from such intrinsic motivators as increases in self-esteem, responsibility, creativity, and self-fulfillment. Learning contracts challenge learners to tap into the intrinsic motivators.

<div align="right">Knowles (1986) as related by Joseph R. Codde, Using Learning Contracts in the College Classroom</div>

Learner Plan Content

Knowles (1986) felt that to support the learner's needs, a learning contract should include:

- **Learning Objectives** – the content (the knowledge, skills, attitudes, etc.) that will be learned and developed by the learners to complete the tasks for their goals
- **Learning Resources and Strategies** – the methods, strategies, activities and resources that will be used to learn the content to accomplish the learning objectives
- **Timelines** – the target date(s) for the various learning accomplishments
- **Learning Demonstration** – what "evidence" will demonstrate that the objectives have been met
- **Validation** – how this "evidence" will be assessed and by whom

Many years have passed since Knowles put forth his theories, yet they are still the core of adult learning and learning contracts or plans. Most would agree that his suggestions for Learner Plan contents are necessary. These five core areas are also consistent with Literacy and Basic Skills (LBS) Learner Plans content requirements. The [LBS Service Provider Guidelines](#) say that the plan should also include:

- the learner's name, address and background details gathered in the learner profile of the LBS Participant Registration
- overall goals
- barriers, possible solutions and referrals (see the *Information and Referral* chapter for more information)
- other non-LBS requirements of the learner's goal path, such as certificates, courses and abilities

As we write Learner Plans, we must consider the learners. The contents, along with the language and format, should meet the learners' need to

- understand the plan and the content
- self-direct their learning
- build on experience
- be ready, willing and able to learn the contents
- address barriers within the plan
- be motivated to work on and complete the plan

Individual Plans for Individual Learners

Learner Plans are a "map" of the path a learner will take on their learning journey from their starting point (intake assessment) to their desired goal. As each learner is different, a Learner Plan should reflect individual objectives, wishes, aptitude and needs. Learner Plans will

- vary depending on the learners' goal path and the tasks their goals require
- include the acquisition of skills to complete tasks in one or more competencies, task groups and levels
- use different strategies, methods and resources
- adapt for disabilities, personal issues or learning styles
- vary in length and may be short (a few weeks) or longer (a year or more)
- have different means of demonstrating learning

Even if learners are on the same goal path, or have common learning goals, learners won't have the same learning styles, abilities, support needs, time available, previous knowledge or experience. You shouldn't have Learner Plans where only the names of learners are different. By duplicating plans, you will not adequately address the needs of learners. Remember that the Learner Plan is unique and should reflect the specific needs and goals of each learner.

Ensure that learners have a solid understanding of the various sections of their Learner Plan and that they are able to share them with staff at other literacy or training programs or at other agencies. Learners should be given a copy of their Learner Plan to keep as you maintain a copy in their file.

Employment Ontario Service Plans and Learner Plans

All Employment Ontario (EO) service providers, including Literacy and Basic Skills providers, create plans that detail the benefits and services they will deliver to meet clients' needs. Within Employment Ontario and the Employment Ontario Information System Case Management System(EOIS-CaMS) these are called service plans. Service plans detail the client's

- goal
- sub-goals
- plan items

For the Literacy and Basic Skills (LBS) field, the Ministry of Training, Colleges and Universities (MTCU) has created service plans in EOIS-CaMS that support the Ontario Adult Literacy Curriculum Framework (OALCF). Terms used in Employment Ontario, EOIS-CaMS, the LBS Participant Registration Form and the Learner Plans are different than those used in the OALCF.

The table and diagram below show the relationship between terms.

Terms Used in EOIS-CaMS and Forms	Equivalent OALCF Terms
Service Plan	Learner Plan
Goal	Goal Path
Sub-Goal	Competency
Plan Item	Task Group and Level

Service Plans

All Employment Ontario service providers create plans for individual participants that detail the benefits and services that the service provider can deliver in order to meet clients' needs. Employment Ontario refers to this type of plan as a service plan, although in we also refer to them as Learner Plans in LBS.

"The service plan is a system tool that allows an Employment Ontario service provider to plan and manage the delivery of services and activities to help a client achieve a specific goal." (*EOIS-CaMS: Service Provider User Guide, Chapter 8B: Service Plan Management for Literacy and Basic Skills*, Version 2.6 April 2019)

Goals

The primary reason for the creation of any service plan is to enable a client to achieve an overall plan goal. In the OALCF, learners' goals are expressed as goal paths. EOIS-CaMS "goals" have been configured for the five LBS goal paths:

- Independence
- Employment
- Adult Secondary School Credit
- Postsecondary Education
- Apprenticeship

Sub-Goals

The goal or goal path can be broken down into more manageable steps to assist the leaner in achieving the goal. These steps are known as sub-goals, which typically consist of one or more scheduled activities or plan items. For LBS, the sub-goals are the LBS competencies, learning activities, training supports and referrals out to community resources or other programs and services.

EOIS –CaMs sub-goals:

- Competency A. Find and Use Information
- Competency B. Communicate Ideas and Information
- Competency C. Understand and Use Numbers
- Competency D. Use Digital Technology
- Competency E. Manage Learning
- Competency F. Engage with Others
- Learning Activities
- Training Supports
- Referrals out to community resources or other programs and services

Plan Items

Sub-goals usually have one or more plan items. Plan items are the actions and/or the achievements that must be fulfilled to meet the learners needs. In LBS, Competency based plan items are representative of the task groups and level indicators from the OALCF with the finishing point attaining a Milestone. The successful completion of some or all applicable plan items is required for a learner to achieve a sub-goal.

- For complete step-by-step directions on creating the LBS service plan in EOIS-CaMS, see Employment Ontario Information System (EOIS) Case Management System Service Provider User Guide Chapter 8B: Service Plan Management for Literacy and Basic Skills. A link for the various chapters of the EOIS CaMS Service Provider User Guide which can be found in service providers EOIS CaMS.

EOIS CaMS Service Plan Template (Learner Plans)

In EOIS-CaMS, "the ministry has created service plan templates based on the relevant program or service guidelines. The templates include a predefined set of sub-goals, which include plan items. Service providers must use these templates when creating service plans; however, a service plan created from a template can still be customized to meet the individual requirements of a specific client, thus providing even greater flexibility." (*EOIS-CaMS: Service Provider User Guide, Chapter 8B: Service Plan Management for Literacy and Basic Skills*, Version 2.6 April 2019)

The EOIS CaMS Service Plan Template for LBS contains two main sections: the Client Summary, and the Learner Plan. "The Learner Plan describes the learning and program elements that prepare learners for their next steps beyond the LBS program. It includes the learner's goal, background information, assessment results, tasks, learning activities, program duration,

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additional supports required by the learner as well as referral results. It organizes information in a common format for ease of use between program providers." (*EOIS-CaMS: Service Provider User Guide, Chapter 8B: Service Plan Management for Literacy and Basic Skills*, Version 2.6 April 2019)

Note: LBS practitioners must be authorized to enter information into, and download from, EOIS-CaMS. Authorization and user codes are arranged by your agency's Ministry of Training, Colleges and Universities Employment and Training Consultant (ETC) following a request from your agency's Service Provider Registration Authority (SPRA).

Learner Acceptance of Plan

For a service plan to be activated, the learner plan template must be accepted by the learner. You need to keep a copy in the learner's file and provide a copy to the learner.

Learners need to understand the contents of their plans in order to accept and agree to them. Keep in mind that the plans are for the learners and that it helps them "own" their learning. For some learners understanding all the steps in their plan and navigating many pages of documents may be difficult. They may feel that there is too much information or that the forms are too complicated. They may have difficulty understanding the language of the OALCF that is presented on the EOIS CaMS Learner Plan.

One way to personalize the Service/Learner Plan in EOIS CaMS is to use the Comments sections of each Plan Item to provide more learner specific details than just the Task Group and Level Indicator. This is especially true in the Learning Activities sub-goals, where you can choose from preset activities or create Custom Plan Items. You may change the name of Learning Activity, Custom Plan Items to be learner specific. Add the specific learning activities that the learner will undertake to the Comments using language that they may better understand or that relates to their goal.

Some LBS agencies prefer using their own learner plan documents to help the learners understand the details of their future training, for example:

- The Literacy Council York-Simcoe has developed learning plans for each of the goal paths they serve. Their Learning Plans have all the applicable milestones offered from drop-down menus in an Excel spreadsheet.
- The Adult Learning Centre for Cochrane and Iroquois Falls has a much more detailed template. Their [LBS Learning Plan and Assignment Tracking Sheet,](#) in the Sample Forms section, lists any of the resources/learning activities that they commonly use. The practitioner completing the form just removes rows that are not applicable to the learner's plan. Other resources and activities can be added in new rows. As well as information needed to set up the learner's plan, there are spaces to track the learners training progress and assessments as they move through the program.

Some practitioners find that mind-maps or other visuals help the learner to visualize the steps to their plan and the links to their goal. Two examples of this are the Key Tasks Learning Form and the Learning Activities Step Plan used by Barrie Literacy Council which can be found in the Sample Forms section.

Whatever method you use, remember, this is an essential step in the adult learning process and worth the time spent helping learners understand and "buy into" their plan.

Building a Service Plan/Learner Plan in EOIS-CaMS

The successful creation of a service plan requires the following steps to be performed in sequence.

1. Create a service plan using the LBS Participant Registration form. The Participant Registration is one of the documents required in each learner file (*Literacy and Basic Skills: Service Provider Program Guidelines*). For help in understanding how to complete the Employment Ontario Literacy and Basic Skills (LBS) Participant Registration form, review the how-to guide offered by CESBA at http://cesba.com/wp-content/uploads/2018/03/How-to-Fill-Out-the-PRF.pdf.

2. In EOIS-CaMS:
    a. Create a client summary from the information on pages 1, 2 and 4 of the completed LBS Participant Registration Form
    b. Add sub-goals and plan items to sub-goals from the information on page 5 of the completed LBS Participant Registration Form
    c. Submit service plan for approval
    d. Create Plan Summary
    e. Download Plan Summary to a secure computer location

3. Make any additions or changes required and print the Plan Summary, now titled as Learner Plan.

4. Present Learner Plan to the learner for acceptance. Provide learner with a copy.

5. In EOIS-CaMS:
    a. Upload any changes made to the Learner Plan/Plan Summary
    b. Record acceptance (or rejection) of plan summary

6. Place a copy in the learner's file.

Setting the Learning Objectives

The first step in setting up a Learner Plan is to set the objectives. Learning objectives or learning outcomes describe what the learners will be able to do by the end of their Literacy and Basic Skills (LBS) plan with your agency.

Learning objectives are drawn from the learner's goal, the goal path requirements, and the learner assessments. These objectives direct the content, how it will be presented and the expected outcome. They help learners see how specific learning activities meet their learning needs.

Wording objectives from the learner's perspective personalizes the objectives, for example, wording the objective as "I will" rather than "the learner will" or "you will."

Objectives should **clearly** state what the learners will be able to do or to demonstrate as a result of their LBS training.
Objectives should not be vague. Instead they should be concrete and measureable. In the following chart, we show an example of a vague objective for a learner on the independence goal path. This is followed by examples of better and more specific learning objectives.

> **Learning objective:** A statement in specific and measurable terms that describes what the learner will know or be able to do as a result of engaging in a learning activity.
>
> Ohio University,
> Heritage College of Osteopathic Medicine
> www.oucom.ohiou.edu/fd/writingobjectives.pdf

Vague goal	Specific learning objectives	Corresponding OALCF Task Groups
Direct and maintain my health	I will read pamphlets on health, medication, recreational programs	A1: Read continuous text
	- from online sources	D: Use digital technology
	I will converse with healthcare providers	B1: Interact with others
	I will read medicine labels	A2: Interpret documents
	- and measure correct dosages	C3: Use measures
	- and take medications at the right time intervals	C2: Manage time

As you can see from the chart, once you have specific, measureable learning objectives, you can relate these to the Ontario Adult Literacy Curriculum Framework (OALCF) competencies and task groups. The competencies that the learner needs to work on are the sub-goals and the task groups and level indicators are the plan items you use to populate the LBS Learner Plan for the EOIS-CaMS system.

The templates created by MTCU provide sub-goals and plan items in the language of the OALCF rather than as learning outcomes specific to the individual learner. Because of this, many programs have developed ways to document the distinctive outcomes for each learner. These may be simple statements such as those in the following forms or more detailed Learner Plan add-ons.

_____
(the learner's name)

By _____,
           (date/time period)

I will be able to _____
                       (insert a task group)

so I can _____
                  (describe a task to be completed)

Filled in this becomes

Chris Smith
(the learner's name)

By **6 months from now**,
(date/time period)

I will be able to

- **Interpret documents** so I can **read medicine labels**

- **Use measures** so I can **measure correct dosages**

- **Manage time** so I can **take medications at the right time intervals**

The learning outcomes can also be incorporated into a larger format that includes learning objective tasks and overall timelines, such as seen in The Adult Learning Centre for Cochrane and Iroquois Falls' LBS Learning Plan and Assignment Tracking Sheet in the Sample Forms section.

Learning Activities, Strategies and Resources

Once you have set the learning objectives with the learner, you can plan how to help the learner meet those objectives. You need to consider the methods, strategies, activities and resources that you will use to enable the learner to accomplish their learning objectives.

Once you have determined suitable, goal-related learning activities, a list of resources is needed to put the plan in motion. What tools will you use to teach the skills and task-completion abilities the learner must acquire? These tools might be books, worksheets, online training materials, videocasts or real-life materials.

To help compile resource lists for individual learners, some programs have developed generic resource lists for the various goal paths.

Task-Based Activities

The Ontario Adult Literacy Curriculum Framework is task-based and goal-directed. It is important that you include task completion as part of your learning strategies. Tasks should be related to the learners' goal paths and goals.

Let's consider a learner whose goal is clerical work (employment) and whose sub-goals (OALCF competencies) include

- Find and Use Information
- Communicate Ideas and Information
- Use Digital Technology

Example activities might be:

- researching clerical work using the Internet
- writing a newsletter article of 200 - 300 words about clerical work and why it is a good choice for the learner
- desktop publishing the article, including 1 to 3 photographs, using MS Word

It may seem like a big effort to think up tasks for all the learners' plans, but help is available. There are a number of excellent resources available to choose from. See the Additional Resources section of this chapter for suggestions.

Although the OALCF is task-based, learners still need to develop the skills to perform the tasks. "Skills are discrete descriptors of literacy and numeracy development, such as decoding, sentence structure and locating information. Tasks emphasize more than skills, as they consider purpose, context and culture to reflect actual use." *from OALCF: Selected Assessment Tools* Together, skills development and task performance make up half of the four aspects of literacy learning as defined in *OALCF: Selected Assessment Tools*.

skills development ➜ task performance ➜ social practice ➜ change

An excellent tool to help you break tasks down into their foundation skills is CESBA's (Ontario Association of Adult and Continuing Education School Board Administrators) *Embedded Skills, Knowledge and Attitudes Reference Guide for Ontario* (ESKARGO).

Connections Adult Learning has developed a number of six to ten week short courses on a variety of hands-on topics, many involving digital technology. For each of these, they have created plans that include both the tasks and the OALCF Task Group/Level Indicator codes and the applicable performance descriptors. A sample of their Managing Your Mobile Device - OALCF Integration can be found in the Sample Forms section.

For more information on learning activities, strategies and resources, see the Training chapter.

Accommodations

The Accessibility of Ontarioans with Disabilities Act (AODA) legislates that educational institutions and their educators, teachers and staff are to learn about and provide accessible learning materials, course delivery and instruction and be knowledgeable at interacting and communicating with people with disabilities who may use alternate formats. This means, whenever a learner has a disability, which many of the learners we serve do, we must build accommodations into their learning plans.

"Documents that are as clear as possible, teaching methods that are as engaged, as relevant and as explicit as possible, using a wide variety of strategies in instruction, bringing inclusive materials (like curriculum that reflects diversity) into any learning environment – these are simply good practices to support everyone's learning." "Every initiative to accommodate has to be unique to the strengths, needs and desires of each individual, and arrived at in consultation with them. Yet sometimes people can't figure out what might help, either because no one has ever asked them before, or because they've only recently articulated the nature of their

challenges." *Current Best Practices and Supportive Interventions for Clients with Learning Disabilities Toolkit*

What Might the Accommodations Look Like?

Current Best Practices and Supportive Interventions for Clients with Learning Disabilities Toolkit has adapted some suggestions from LDonline.org's excellent online resource, *Accommodations and Compliance Series: Employees with Learning Disabilities*. These cover the areas of Reading, Spelling, Writing, Mathematics, Speaking/Communicating, Organizational Skills, Memory, Time Management and Social Skills.

Adaptive and assistive technologies are becoming more and more widely available, affordable, and understood. E-readers, text magnifiers, screen readers and voice-to-text programs are a few of the common possibilities. *Current Best Practices and Supportive Interventions for Clients with Learning Disabilities Toolkit* provides some suggestions you may want to build into some learner plans. However, the toolkit cautions "Careful needs-based selection of assistive technology is paramount, but more importantly, selection has to be collaborative with learners, chosen according to their preference and goals. The phenomenon of "buy in" is central."

Timelines

Learners have a right to know when they can expect to finish the Literacy and Basic Skills program. They need to have a timeline.

A timeline is a timetable or a schedule of events. Timelines are usually divided into blocks or sections with each section ending in a milestone. Timelines show events and activities in the order in which they will happen or have happened.

The Learner Plan timeline is the chronological map of the learners' time in our program. It shows when blocks of learning will be completed and which milestone or other assessment strategy will validate the learning in that section. We can think of each plan item as a block. These blocks are the time in which the learner will complete activities to develop the skills to manage tasks at task group levels. Each plan item should have an expected start and end date. When all the blocks are put together, we can estimate the overall time it will take the learner to reach their LBS goal and be ready to transition to their next step.

Estimating how long it will take to do something is often very difficult. Here are some tips for creating a realistic timeline:

- look at each sub-goal and plan item
- analyze the various activities and tasks you have planned
- determine the order in which the activities, tasks and plan items need to be done
- estimate how long each activity, task, or plan item will take and then plan a little extra time for each
- plan for an extra activity or two in case the learner experiences difficulty
- add all the times to get an estimate of the total time for each plan item, sub-goal, etc.
- be flexible – adjust the plan and timelines to the learner's needs to keep it current and relevant.

You might try using a Gantt chart to help you track the various pieces and to provide a visual for you and the learner. Gantt charts are commonly used in project management. However, as they show activities (tasks or events) displayed against time, they are also useful for planning learning. Each activity is represented by a bar. The bar represents the start date, duration and end date of the activity. This allows you to see at a glance:

- what the activities are
- when each activity should start and end
- where activities overlap with other activities, and by how much
- the start and end date of the whole plan

In the example Gantt chart below, there are numbers representing the tasks. Providing details of the tasks and activities would make it easier for the learner to visualize their learner plan.

Task/ Activity	Start	End	04/ 05	04/ 12	04/ 19	04/ 26	05/ 03	05/ 10	05/ 17	05/ 24	05/ 31	06/ 07	06/ 14	06/ 21	06/ 28
1	April 5	April 19	█	█											
2	April 12	May 3		█	█	█									
3	April 25	May 23				█	█	█	█						
4	May 15	May 29							█	█					
5	May 18	June 15								█	█	█	█		
6	June 1	June 29										█	█	█	█
7	June 5	June 29										█	█	█	█

You can create a Gantt chart by hand on graph paper or use downloadable Excel templates. Microsoft Project or other specialized software have Gantt chart views.

Planning for Learning Demonstration and Validation

Assessment is a critical part of the Literacy and Basic Skills program. We need to ensure that assessment of learning is built into the Learner Plan. Without assessment at various stages along the timeline, how will any of the stakeholders – the learners, the funder, our transition partners or ourselves – know that the training is working?

For the learner to feel ownership of their plan, they need to know how to tell when the plan is complete. They should know

- what success will look like
- how success will be determined
- who will be the judge of success

The Learner Plan Template includes fields for recording tasks and other learning activities to demonstrate learners' progress towards completion of their goal path and their readiness to transition beyond the LBS Program.

Within the OALCF, milestones are the main tools used to demonstrate completion of plan items. "Milestones are goal-related assessment activities that learners complete to demonstrate their abilities to carry out goal-related tasks. Learners and practitioners work together to choose milestones that are meaningful and appropriate, given both the learner's literacy skills and the learner's goals." (Employment Ontario Partner's Gateway [Overview of the OALCF](#) - General Questions and Answers, Question #4 – How are Milestones and Culminating Tasks captured?)

> Two tips from *Choosing Milestones and Culminating Tasks:*
>
> - Introduce the assessment tools and expectations at intake
> - Present the learning plan with milestones and a culminating task included so learners understand what is expected
>
> *Choosing Milestones and Culminating Tasks,* Ontario Association of Adult and Continuing Education School Board Administrators (CESBA) and Community Literacy of Ontario (CLO) January 22, 2016, Presented by Robyn Cook-Ritchie.

You are not to show the learner any milestones until the learner is ready to attempt that milestone. However, you should share the overall concept of milestones and the general description of the individual milestones selected.

Selected milestones should be entered into EOIS-CaMS at the time you enter the learner's service plan. As a result, the milestone numbers will print out on the downloaded Learner Plan.

"Another indication of learner achievement is the successful completion of **goal-related culminating tasks**. These are more complex than milestone tasks and aligned with the Curriculum Framework. Culminating tasks draw together multiple competencies which may be at different levels of complexity. The successful completion of a culminating task is an important demonstration of the learner's ability to manage the kinds of tasks they will encounter once they transition beyond the LBS Program." (Employment Ontario Partner's Gateway Overview of the OALCF - General Questions and Answers, Question #4 – How are Milestones and Culminating Tasks captured?)

Milestones and culminating tasks are not the only means of demonstrating learning. You and the learner should work together to plan what other means can be used to show acquisition of skills and ability to complete goal-related tasks. Task-based activities like those found on www.taskbasedactivitiesforlbs.ca or integrated tasks are two examples of other ways to assess learning. For more information on assessing, go to the *Literacy Basics* module on *Assessment*.

Reviewing the Plan

Learner plans are not static. They are living documents. Literacy learners may face many barriers and challenges that can affect their learning ability and schedules. When these things occur, we need to adjust the plan to suit the learners' current needs.

> A living document is a document that is continually edited and updated.
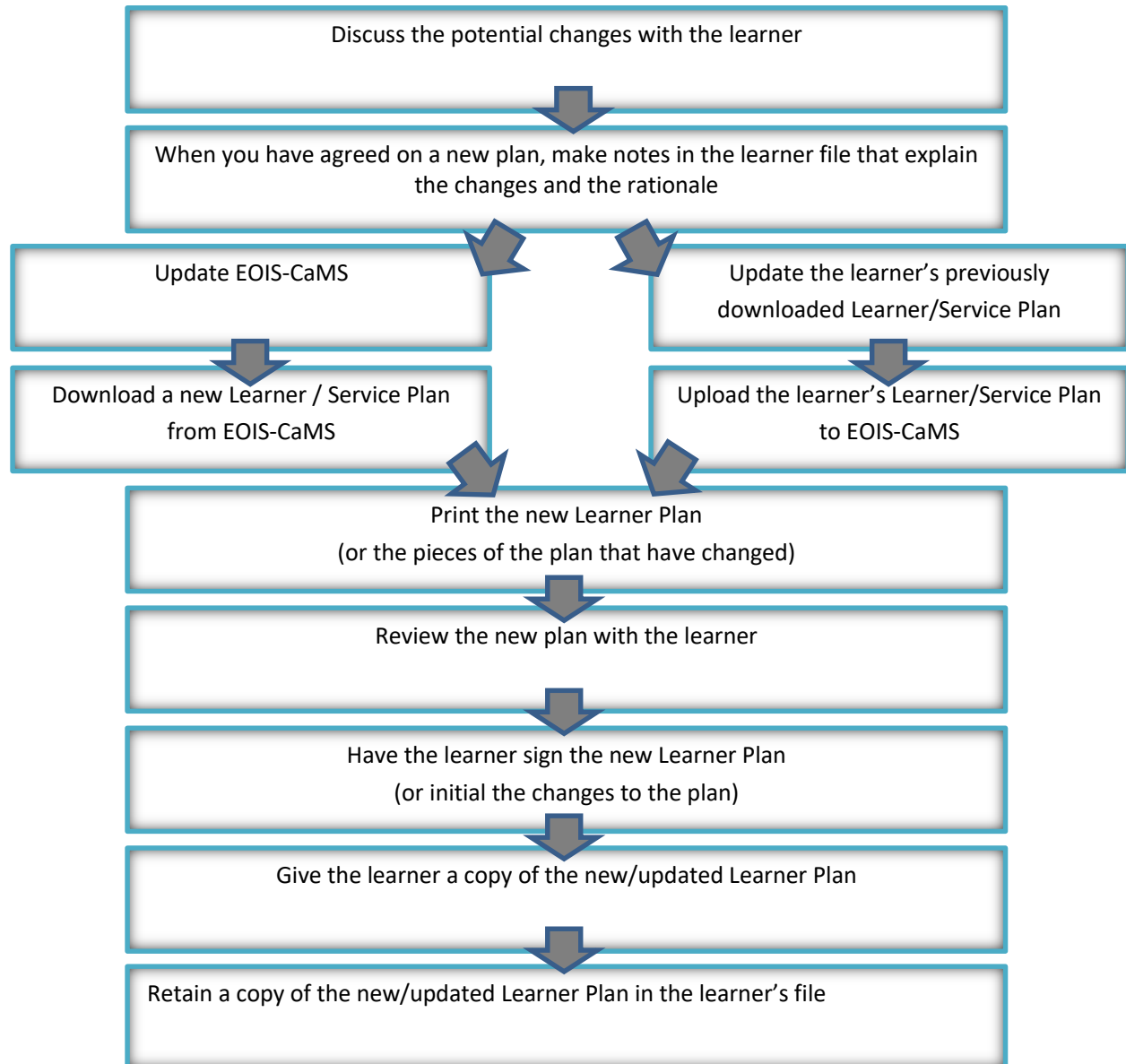>
> Wikipedia

Some reasons for Learner Plan changes are

- a learner changes their goal
- significant events affect the timelines (health, absenteeism, etc.)
- progress varies from the original estimate

To ensure that Learner Plans continue to meet the learners' goals, learning objectives and timeframes, you must regularly review the plans. This is a Literacy and Basic Skills service provider requirement (*LBS Service Provider Guidelines*, effective October 2016). Most importantly, reviewing the Learner Plan ensures that it continues to fit the learner's needs.

Changing a Learner Plan

If a learner's plan needs adjusting, you should take the following steps:

Discuss the potential changes with the learner

When you have agreed on a new plan, make notes in the learner file that explain the changes and the rationale

Update EOIS-CaMS

Update the learner's previously downloaded Learner/Service Plan

Download a new Learner / Service Plan from EOIS-CaMS

Upload the learner's Learner/Service Plan to EOIS-CaMS

Print the new Learner Plan
(or the pieces of the plan that have changed)

Review the new plan with the learner

Have the learner sign the new Learner Plan
(or initial the changes to the plan)

Give the learner a copy of the new/updated Learner Plan

Retain a copy of the new/updated Learner Plan in the learner's file

When to Review Learner Plans

There is no set time frame for reviewing Learner Plans. The reviews should be appropriate to the learners' schedules. For example, if a learner attends your program only 2 days a week, the time frame between reviews might be longer than for a learner who attends 5 days a week. In another instance, a learner who progresses quickly might have reviews more often than someone who takes a little longer to master skills and complete tasks.

The Ministry also requires us to have a system to remind us to review files. Programs do this in different ways, such as

- day-timers and computer-based task tracking such as Outlook
- event activity reminders built into the Employment Ontario Information System Case Management System (EOIS-CaMS).

  Note: LBS practitioners must be authorized to enter information into, and download from, EOIS-CaMS. Authorization and user codes are arranged by your agency's Ministry of Training, Colleges and Universities Employment and Training Consultant (ETC) following a request from your agency's Service Provider Registration Authority (SPRA).

- review as milestones are completed
- reviews of all files at a specific time, such as monthly

Learner Plan Development in Summary

We need to have Learner Plans completed, signed and in our files. But Learner Plans should *belong* to the learners. Engage learners in developing the Learner Plan so that they understand

- the steps that should be taken
- the order in which skills and tasks should be addressed
- the resources and activities to be used to help them with each plan item (OALCF Competency) and sub-goal (OALCF Task Group)
- the relationship between the learning activities, the learning objectives and their goals
- how the strategies and methods suit their needs and learning styles
- what types of training delivery will be used for what learning, for example:
    - o one-to-one tutoring
    - o small group
    - o classroom
    - o blended learning using some e-Channel
    - o other online training
- how the learning will be assessed
- when and how the plan will be reviewed

Learner Plan Development

Goal Path Requirements

Learner's Goal

Learner Assessments

Learning Objectives

Sub-Goal Training Supports

Plan Item Type of Support

Timelines

Sub-Goal Competency

Plan Item Task Group

Methods Resources

Milestone

Timelines

Sub-Goal Learning Activities

Plan Item Learning Related to…

Methods Resources

Timelines

Sub-Goal Referrals

Plan Item Task Group

Timelines

Culminating Task

Additional Resources

The following are some examples of tools and resources that may be useful for Learner Plan development. These resources were of interest to LBS practitioners interviewed during the development of the online modules and have also been gathered through good old-fashioned research. This is not intended as an exhaustive list, and we encourage you to explore the resources available on the Internet.

- The Government of Canada has a [website](#) devoted to Essential Skills. It provides access to tools and resources to help meet the Essential Skills needs of
  - [Job seekers and workers](#)
  - [Apprentices and tradespersons](#)
  - [Trainers and career counsellors](#)
  - [Employers](#)

- *[Moving Forward: Curricula and Resources for Learners on the Independence Goal Path](#)*
This resource from Community Literacy of Ontario is an OALCF competency-based learning curricula that can be used with learners on the Independence goal path. *Moving Forward* includes information sheets, activity sheets and practitioner information within five modules:
  - Communication
  - Food and Nutrition
  - Household Dangers
  - Managing Your Money
  - Time Management and Organization

Moving Forward also has a listing of 49 additional resources. Available from CLO in print on a cost-recovery basis plus postage or **downloadable for free** on CLO's website.

- *Measure-Up* (How do your skills Measure Up?) http://www.skillplan.ca/measure-up (please note that this URL needs to be typed directly into a browser to access this great resource)
SkillPlan has developed an online site with free task-based activities to practice and test skills in three Essential Skills: Reading, Document Use and Math.

- The [Literacy and Basic Skills](#) page of CESBA's website
This resources and tools page was developed by [CESBA](#) and contains a wealth of tools to help practitioners and learners work within the OALCF. Many of these resources are particularly useful when developing learner plans.

The Ontario Adult Literacy Curriculum Framework section includes a link to OALCF and Milestones Alignment Charts. There are charts for each goal path. These align the milestones to the competencies, task groups and level indicators and provide a brief description of the task

involved. This can help learners to understand what tasks they are doing activities and building skills to accomplish and how those tasks relate to their goal.

- The ESKARGO and Implementation Strategy Resource: LBS Program Learner Welcome Package sections also have useful links for learner plan development. *Embedded Skills, Knowledge and Attitudes Reference Guide for Ontario (ESKARGO)*, can help with the selection of tasks and how to bridge the gap between selecting a task and knowing what to teach. The ESKARGO contains lists of skills and knowledge found in tasks that are situated within each particular competency, task group and level. It also has an ESKARGO Attitudes Rubric to help learners consider how attitude plays a role in successful task performance. There are links to welcome packages for each of the three OALCF levels.

- The section on Choosing Milestones and Culminating Tasks links can also be helpful. You might like to view the slides from the Choosing Milestones and Culminating Tasks, 2016 webinar for quick overview.

  - The EOIS CaMS Online Toolkit has desk aids and instruction guides to show practitioners how to enter the service plan and how to fill in a Participant Registration form.
  - The Other Tools section has interesting resources your might wish to review.

- *Ontario Skills Passport (OSP) Skills ZONE*

  This site has useful interactive tools and videos to help learners on the Employment goal path understand the needs of their goal and goal path. These tools and resources are built around Canada's Essential Skills (ES), which are task-based and levelled the same as the OALCF. There is also a section that explains the difference between a task and a skill-building activity and many activities to build into the Learners' Plans.

- *SkillPlan* materials http://www.skillplan.ca/tools-and-publications

  SkillPlan has developed many resources which contribute to essential skills development and include task-based activities. Type the URL directly in a browser to access these great materials.

- Task-based Activities for LBS

  This helpful online resource, developed by QUILL Learning Network, is a repository of hundreds of activities especially for the OALCF goal paths and competencies. You can browse the activities by goal path and/or level or use the search option to find the most appropriate resources for your learner plans.

- OALCF Tools and Resources provides information on OALCF tools and resources including these publications:
  - *The Goal Path Descriptions*
    - Introduction
    - Apprenticeship
    - Employment
    - Independence
    - Postsecondary Education
    - Secondary School Credit
  - *Integrated Tasks by Goal Path*
  - *Foundations of Transition-Oriented Programming*

- Including E-channel programming into learner plans can be advantageous for both the learners and the practitioners. Online workshops and courses are available through The Learning Hub, Good Learning Anywhere, ACE Online, Deaf Learn Now and F@D (Formation à Distance).These offer learners a different learning method and more experience with digital technology while requiring less practitioner involvement within your program. There is An Information and Referral Guide for Ontario's Online e-Channel Program that may help you with the process and each of the individual providers have course schedules or catalogues on their site.

- The SNOW Inclusive Learning site, from OCAD University in Toronto, has some great information on learning in inclusive classrooms and with assistive and adaptive technology, alternative print formats to help learners with disabilities and to meet the requirements of the Accessible Ontarians with Disabilities Act (AODA).

- TOOLKIT: Current Best Practices and Supportive Interventions for Learners and Clients with Learning Disabilities by Metro Toronto Movement for Literacy is full of wonderful information and tips to help you include the best support learners in your plans.

- The Learning Networks of Ontario (LNO) is a coalition of 16 regional LBS networks located throughout Ontario. These networks are constantly researching and developing new materials, to help us provide the best literacy services to the learners. Some of the tools in the Instructional Resources section may be valuable additions to some learner plans. The Goal Path Summaries developed by Literacy Link Eastern Ontario (LLEO) in 2017 may offer a more updated view of the various goal paths. The Apprenticeship path has been divided into two paths, Apprenticeship and Skills Training. Both are available along with Secondary, Post Secondary, Employment and Independence.
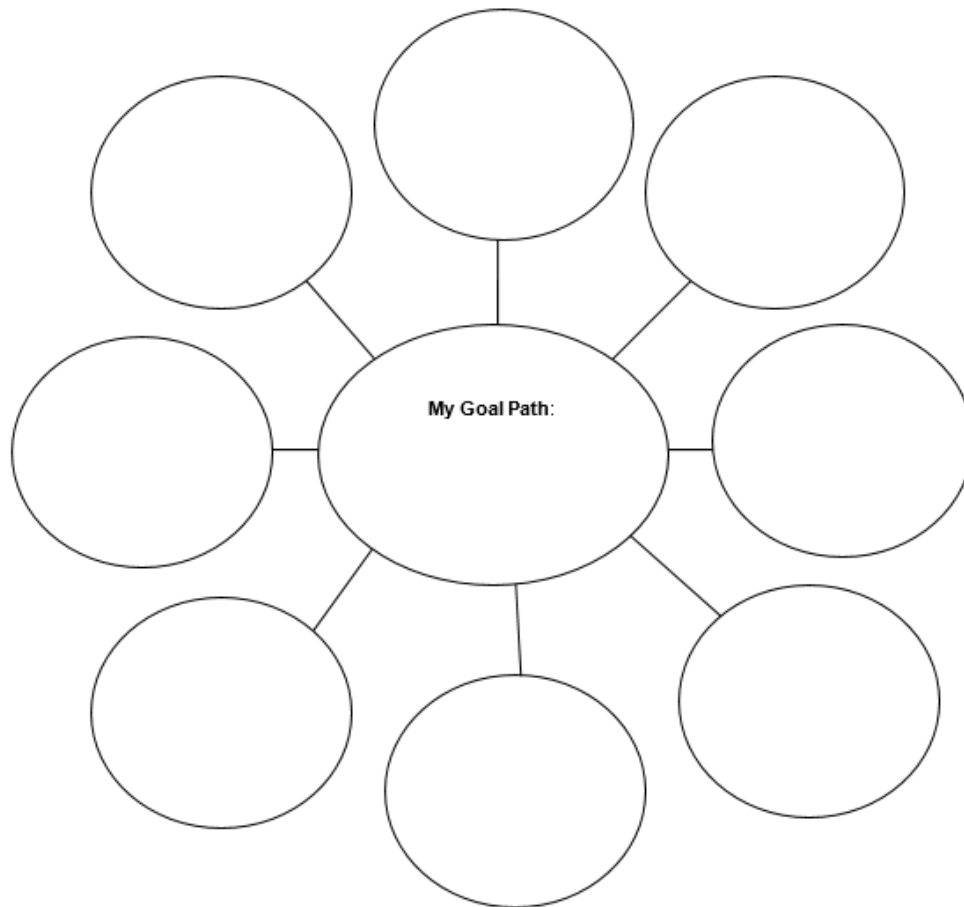
Sample Forms

Key Tasks Learning Plan

Adapted from Barrie Literacy Council

Student Learning Plan

Name: _____Student #_____Date:

Sign and Date after review:_____

KEY TASKS

My Goal Path:

Entry Level: Reading ___   Writing ___   Numeracy ___

Level at Exit from BLC: ____   Other Skills Needed: ___

Program Options : ___   Time Needed: ___

Next Step: __

Learning Activities Step Plan

Adapted from Barrie Literacy Council

NAME: _____ Student # DATE: _____

TASK:
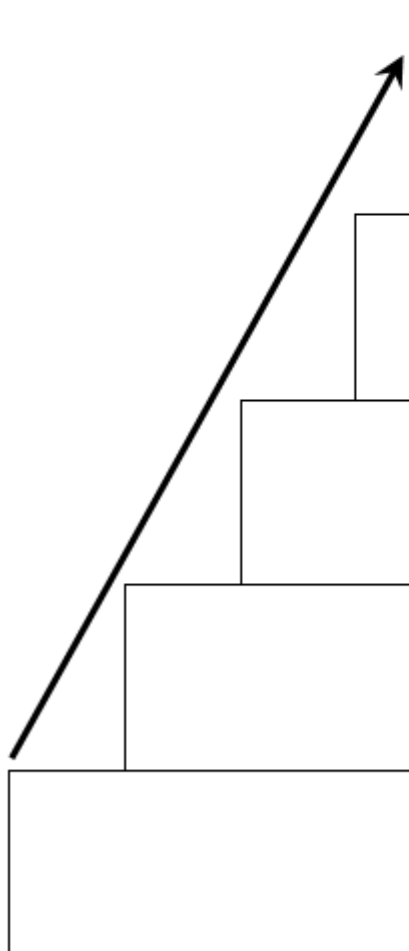
Demonstration:

Expected Date of Completion: _____

LEARNING ACTIVITIES

What I Need to Learn	Resources

SIGN AND DATE AFTER REVIEW: _____

LBS Learning Plan and Assignment Tracking Sheet
Adapted from The Adult Learning Centre, Cochrane and Iroquois Falls

Name: Click here to enter text.	**Goal Path:** Choose an item.
Phone: Click here to enter text.	**Plan Development Date:** Click here to enter a date.
Short Term Goal: Click here to enter text.	**Long Term Goal:** Click here to enter text.

Referral IN:

☐ Employment Service Agency	Click here to enter a date.
☐ LBS Agency ENGLISH	Click here to enter a date.
☐ LBS Agency FRENCH	Click here to enter a date.
☐ Secondary School Upgrading	Click here to enter a date.
☐ Distance Education Program	Click here to enter a date.
☐ Ontario Disability Support Program	Click here to enter a date.
☐ MTCU Apprenticeship Consultant	Click here to enter a date.
☐ Ontario Works	Click here to enter a date.
☐ Other Education Provider	Click here to enter a date.
☐ Other Community Supports	Click here to enter a date.
☐ Other: Click here to enter text.	Click here to enter a date.

Referral OUT at assessment:

☐ Employment Service Agency	Click here to enter a date.
☐ LBS Agency ENGLISH	Click here to enter a date.
☐ LBS Agency FRENCH	Click here to enter a date.
☐ Secondary School Upgrading	Click here to enter a date.
☐ Distance Education Program	Click here to enter a date.
☐ Ontario Disability Support Program	Click here to enter a date.
☐ MTCU Apprenticeship Consultant	Click here to enter a date.
☐ Ontario Works	Click here to enter a date.
☐ Other Education Provider	Click here to enter a date.
☐ Other Community Supports	Click here to enter a date.
☐ Other: Click here to enter text.	Click here to enter a date.

Referral to Other Programs and Services:

Schedule: ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

LBS Program Completion date: Click here to enter a date.   **(Time) Approximately:**   weeks

Learning Style: VisualVisual

	Start Date	End Date	Outcome	Comments	Entered in CAMS
Make it Math – Unit 2 Addition				Mixed Review: Review:	☐
Make it Math – Unit 3 Subtraction				Mixed Review: Review:	☐
Make it Math – Unit 4 Multiplication				Mixed Review: Review:	☐
Math Sense-Whole Numbers and Money – Unit 5				Mixed Review: Review:	☐
Milestone: #37					☐
Make it Math: Decimals				Mixed Review: Review:	☐
TRAINING Supports – Taxi					

Make it Math: Fractions				Mixed Review: Review:	☐
Make it Math: Ratios/Percent				Mixed Review: Review:	☐
Task: Convert Fractions to Decimals on a Timesheet					☐
Milestone # 42/43					☐
Math Sense-Comprehensive Review; Unit 1: Whole Number Review				Review : Practice Test :	☐
Math Sense-Comprehensive Review; Unit 2: Decimals and Money				Mixed Review = Review = Practice Test =	☐
Task: Verify Costs on a Receipt					☐
Milestone: #39					☐
Math Sense- Comprehensive Review; Unit 3: Fractions, Ratios, Decimals and Percents				Mixed Review = Review = Practice Test =	☐
Math Sense- Comprehensive Review; Unit 4: Data and Measurement				Mixed Review = Review = Practice Test =	☐
Task: Interpret data on a graph					☐
Milestone #51					☐
Math Sense-Algebra and Geometry-Unit 1				Mixed Review = Review =	☐
Math Sense-Algebra and Geometry-Unit 2				Mixed Review = Review =	☐
Math Sense-Algebra and Geometry-Unit 3				Mixed Review = Review =	☐
Math Sense-Algebra and Geometry-Unit 4				Mixed Review = Review =	☐

Math Sense-Algebra and Geometry-Unit 5				Mixed Review = Review =	☐
Math Sense-Algebra and Geometry-Book Post Test					☐
Math Sense- Comprehensive Review; Unit 5: Algebra and Geometry				Mixed Review = Review = Practice Test =	☐
Math Sense- Comprehensive Review; Book Post Test *(Must achieve ≥80% to move into ACE Math)*					☐
Task: Use Map to Make Calculations					☐
Milestone: # 46					☐
** Referral to ACE Math ☐ = DATE		**** Referral to Adult Ed.** ☐ = DATE			

Adapted from Connections Adult Learning

Course Name:	Managing Your iPad/iPhone Workshop
Start Date:	**End Date:**
Goal Path: Employment __ Apprenticeship __ Secondary School __ Post Secondary __ Independence __	
Course Description: The course will help learners improve their skills in finding and using information, communicating ideas and information, engaging with others and using digital technology for various goal paths. The tasks used to teach these skills will involve learning the elements of an iPad or iPhone.	

Dates:	Topics:
	- Introductions - Course Outline - Assessment and registration - Learning Plan overview - Hardware elements, e.g., Ports, connectors - Screens and their features - Basic Gestures - Opening apps - Control centre - App switcher - Widgets Learning activities provide understanding and practice in: A.2 - Interpret documents, A.3 - Extract information from presentations and D - Digital Technology
	- Review of Day 1 - Keyboard basics - Accessing special and multilingual characters - Email and Contacts apps - Common icons - Web browsing (Siri, Google Chrome) Learning activities provide understanding and practice in: A.2 - Interpret documents, A.3 - Extract information from presentations, B3.2a - Complete documents and D - Digital Technology

	• Basics of using Siri to perform actions verbally • Types of apps • Obtaining apps (App Store), using search and evaluation features • Organizing, managing and deleting apps • Practice Activity: Install and use an app • Homework to find and use apps • Milestone 55 D2 Digital Technology ❏ attained Learning activities provide practice in: A2.3 - Understanding unfamiliar elements, doing complex searches, comparing and contrasting information and identifying sources, A.3 - Extract information from presentations and D - Digital Technology
	• Using the device's camera • Camera and Photo apps • Taking, editing and sharing photos and videos • Activity: edit a photo • Using online and downloadable photo editing software - benefits/drawbacks • iCloud storage • Video Conferencing (FaceTime, Messenger) • Milestone A3 – M 14 ❏ attained Learning activities provide practice in: A2.3 - Understanding unfamiliar elements, doing complex searches, comparing and contrasting information and identifying sources, A.3 - Extract information from presentations and D - Digital Technology
	• Other iPad/iPhone features, e.g., Bluetooth, battery, processer, memory • Differences in iPad/iPhone models/ software versions • Comparison methods • Selecting best option for you • Settings Learning activities provide practice in: A2.3 - Understanding unfamiliar elements, doing complex searches, comparing and contrasting information and identifying sources, A.3 - Extract information from presentations, B3 - Create and Complete Documents and D - Digital Technology

	- Split screen and slide over - FaceTime and Messenger audio/video calls and conferencing - Security and Privacy: evaluating your risk, passcodes/passwords - Find my iPhone/iPad - Updating and backing up - Overall online presence - Safer browsing - Troubleshooting - Exit Survey Learning activities provide practice in: A2.3 - Understanding unfamiliar elements, doing complex searches, comparing and contrasting information and identifying sources, A.3 - Extract information from presentations and D - Digital Technology

	❑Learner enrolled for further training (see updated Learner Plan)
	
	❑ Learner exited
	
	    ❑ exit interview/forms completed
	    ❑ file closed on EOIS-CaMS