literacy link

Change in direction for adult literacy research

Over the past few years adult literacy research funds have been distributed to the Adult Literacy and Numeracy Australian Research Consortium (ALNARC). This funding is now being managed by the National Centre for Vocational Education and Research (NCVER) through a competitive tendering process.

In consultation with the Adult Literacy Research Program Advisory Group (membership comprising the Department of Education Science and Training, the Australian National Training Authority, the National Research Advisory Council, ACAL, Industry and state/territory adult literacy representatives) a draft research agenda has been prepared.

On 8 August, following a short secondary consultation stage, NCVER advertised in the national press and on its web site for brief expressions of interest from suitably qualified and experienced researchers to conduct research into issues related to adult literacy, including language, literacy and numeracy, with these expressions being due by 23 August.

In addition to an open category, the following areas have been identified:
• Re-engaging those with literacy needs
• Adult literacy and training
• Adult literacy and generic skills
• Dimensions of language, literacy and numeracy
• Languages other than English and the impact of the Australian Qualifications Framework
• Adult literacy training provision.

Successful applicants from the 'expression of interest' stage will be asked to prepare detailed research proposals, with projects probably being underway by October 2002.

Applied research is meant to be objective in nature, systematic in approach, empirical in design and cumulative in intent. This means it endeavours to take an impartial approach to seeking best possible solutions; it moves through a series of theoretically informed and planned stages; it involves the gathering and rigorous analysis of relevant data; and finally, it can demonstrate that it builds on past knowledge to add new insights to the field.

ACAL will therefore be interested in the progress of the successful projects as well as in the outcomes of this new approach to national adult literacy research. It will be particularly anxious to ensure that balance is maintained on this national research agenda so that the needs and concerns of adult literacy clients within and across all sectors and contexts are included and equitably and appropriately addressed.

ACAL believes that effective dissemination of research results is essential for impact on

contents:

policy, practice and further research. We will therefore keep *Literacy Link* readers informed about who are the successful applicants and invite these researchers to use our newsletter to provide us with progress reports on their work.

Previously ALNARC, a consortium of six Australian universities, worked with funding allocated on an annual basis. It carried out a research program of projects designed to have input into policy and practice in designated national priority areas as well as projects focused on more locally-determined issues.

ALNARC will be holding a 'research and policy dialogue' at the University of Technology, Sydney on Friday 20 September 2002 to initiate conversation around findings of its latest research program with people working in relevant policy fields to explore common concerns and strategic, collaborative approaches to contemporary adult literacy and numeracy issues.

Geraldine Castleton
ACAL President

RECENT ARRIVALS IN AUSTRALIA: LITERACY FOR LIVING

ACAL FORUM

DATE: Thursday 31 October 2002
TIME: 8.45 am—4.30 pm
VENUE: Manly Pacific Parkroyal Hotel
Manly, NSW
COST: $90.00 (incl. GST)
Includes lunch and light refreshments

This forum will focus on how adult language, literacy and numeracy support strategies can assist in creating opportunities for recent arrivals to take up active roles as Australian citizens. Its interest will be in exploring how these strategies work to develop positive participation in Australian communities.

The keynote presentation and panel sessions will raise issues pertinent to the relationship between language, literacy and numeracy and aspects of everyday life such as health, justice, welfare, finance, work and education. Opportunities will be made available for participants to discuss and debate these issues, with the goal of providing advice to ACAL on future directions it should take in this area.

The keynote speaker will be **WENDY BACON -** Associate Professor in Journalism, University of Technology Sydney. A morning panel session will look at the 'big picture' and address pertinent issues for new arrivals, with particular reference to: law, health and finance. Panelists include: **BADEN OFFORD** - Lecturer in Cultural Studies, Southern Cross University; **LISA OSBORNE** - from STARTTS (Service for the Treatment and Rehabilitation of Torture and Trauma Survivors), and **KALDOUN HAJAJ** - Financial Services Consumer Policy Centre, Faculty of Law, University of New South Wales

An afternoon panel session will look at the 'reality on the ground'. Speakers will include recent arrivals from Afghanistan now living in Young, NSW and a TAFE teacher working with them in English Language and Literacy at the local abattoir. Summing up the day's proceedings and pulling together the various issues will be **MARY HAMILTON** - Professor of Adult Learning and Literacy, Lancaster University, UK.

FOR FURTHER INFORMATION CONTACT:
ACAL 2002 Forum Organiser
C/- The Hotel Network
PO Box 236 Roseville, NSW 2069
PHONE: 02 9411 4666
FAX: 02 9411 4243
EMAIL: acal@hotelnetwork.com.au
WEB: www.hotelnetwork.com.au

Generic employability skills
—the debate between education and business that might reshape our future work

by Rosa McKenna

The Australian Chamber of Commerce and Industry (ACCI) and the Business Council of Australia and other industry groups have embarked on a major exercise to ascertain what employers really think are the types of attitudes and skills required in work, either in an enterprise or being self-employed. With funding from the Australian National Training Authority (ANTA) and the Department of Education Science and Training (DEST) a number of publications are now available that promote a discussion about generic skills that has not been tackled since the work of the Mayer Committee in the early 90s.

This article provides a brief introduction to the employers' perspective drawn from 'Employability Skills—An Employer Perspective', an issues paper published on the ACCI web site and invites ACAL members to contribute to this ongoing debate between the business and education communities. It may be the debate that shapes our future work.

The business community regards the importance of knowledge work and knowledge workers as being the key to Australia's response to globalisation and future economic success. They emphasise the need for a community equipped to understand and participate in ongoing change and the role that education and training providers will have in this process.

This project has identified the key generic employability skills the business community believes workers should possess. These generic skills are in addition to skills specific to the particular job, or relevant technical skills.

The project, a literature review, case studies of large Australian enterprises as well as case studies capturing information from medium and small enterprises through focus group meetings, employed a range of methodologies to provide advice on:

- possible new requirements for generic employability competencies that industry requires, or will require in the foreseeable future since the Mayer competencies were developed;
- a clear definition of what Australian industry and leading business enterprises mean by 'employability' skills and the consistency (or otherwise) between the various terms similarly used;
- a proposed suite of employability skills, including an outline of assessment, certification and reporting of performance options that suit both industry and education; and
- industry (small, medium and larger business) reactions to the proposed suite and reporting options;

The Australian Council of Education Research

(ACER) conducted a review of the literature and provided some useful differentiation between technical skills, job specific skills and more general skills and personal attributes related to employment. Significantly while this work confirmed the ongoing relevance of the Mayer Key Competencies, it developed a working definition that is a significant departure from our understanding of generic skill in the Australian context.

The Mayer Committee resisted the inclusion of personal attributes, attitudes or characteristics in the final Key Competencies, unlike similar work, such as the SCANS in the US and the 'basic skills' movement in the UK.

The business community is claiming broad agreement that all young people need a set of personal attributes and skills that will prepare them for employment and further learning. They also recognise that the ongoing employability of individuals is dependent on their having a set of relevant skills as well as the capacity to learn new things. The business community has reframed these sets of personal attributes as employability skills.

Employability skills are defined as skills required not only to gain employment, but also to progress with an enterprise so as to achieve one's potential and contribute successfully to enterprise strategic directions.

The final product of the project is an Employability Skills Framework that is intended to contribute to the thinking and curriculum development of the Australian education and training system

Critical aspects underpinning the Employability Skills Framework

The Employability Skills Framework incorporates the following personal attributes that contribute to overall employability:

- Loyalty
- Commitment
- Honesty and integrity
- Enthusiasm
- Reliability
- Personal presentation
- Commonsense
- Positive self esteem
- Sense of humour
- Balanced attitude to work and home life
- Ability to deal with pressure
- Motivation
- Adaptability

The key skills identified in conjunction with the personal attributes to make up the Employability Framework are:

- Communication skills that contribute to productive and harmonious relations between employees and customers

There seems to be a problem with your attitude.

- Teamwork skills that contribute to the productive working relationships and outcomes
- Problem solving skills that contribute to productive outcomes
- Initiative and enterprise skills that contribute to innovative outcomes
- Planning and organising skills that contribute to long term and short term strategic planning
- Self management skills that contribute to ongoing improvement and expansion in employee and company operations and outcomes
- Technology skills that contribute to the effective execution of tasks

Language, literacy and numeracy

While I agree that it is desirable to know and understand the views of employers about what they believe are the skills required to enter and sustain ongoing employment, there are some significant problems with implementing any form of generic employability skills. The re-opening of the debate, however, does provide a platform for re-introducing discussion that may tease out a better understanding of 'communication' or language, literacy and numeracy skills which appear to underpin the ways people present themselves in their work, and to explore the extent that these can be taught and assessed.

Employers will need the education community to implement any framework they develop. It will therefore need to be both teachable and assessable.

There appears very little understanding among employers that it is the way that individuals use a repertoire of linguistic skills that enables them to operate effectively in a range of social contexts, including work, as well as to think and resolve problems. It is these skills that underpin the capacity to work in or lead a team, to plan

Disclaimer
Material inserted with *Literacy Link* should not be viewed as being in any way endorsed by the Australian Council for Adult Literacy.

and manage own learning or provide customer service.

The inclusion of personal characteristics in relation to employment is quite dangerous and may serve to exclude competent people from work on tbe basis of quite discriminatory criteria—What is the right attitude? What is funny? To whom do you owe loyalty?

The Key Competencies developed by the Mayer Committee have been validated through this project and the resistance to the inclusion of attributes, attitudes or personal characteristics as key competencies has also been vindicated. This discussion about the ways in which generic employability skills could be assessed is the same as when the Mayer Committee was considering generic skills, and these still apply. Had the Key Competencies included, as originally intended, a category on 'culture', then ways of defining what society values among groups of individuals and ways of valuing the attribute of working in a multicultural, pluralist or diverse community could be recognised.

The ACER review confirms the view that the Key Competencies still have not been embedded in education assessment and reporting process. While many of these ideas have been captured in the curriculum developments in the schooling sector and have been valued in the more recent National Goals for Schooling, they still do not form part of the formalised assessment and certification system.

In the VET system, the Key Competencies are located at the end of units of competency in Training Packages. They appear tacked on. The assignment of 'level' is confusing and its meaning is not necessarily integrated with any of the critical knowledge and skills articulated in the unit. The Key Competency levels do not relate to, or are confused with, the levels of the AQF, the Australian Qualifications Framework *(not to be confused with the AQTF, the Australian Quality Training Framework, ed)*. The statements themselves are too generic and, for any serious implementation, need to be made specific to each Training Package for them to be assessable.

Should they be taken up more seriously within the construct of a Unit of Competency there would be greater opportunity to explore the micro skills required in the industry context that would make them both relevant and assessable.

The assessment and certification options being canvassed require serious consideration by the education community. Will these skills—as defined by employers—become the new basic skills and define our work?

Do we want a generic employability skills test to be introduced? Do we want an extension of the Graduate Skills Assessment? Do we want to develop a level of the AQF at which one would need to be certified as having these pre-requisite skills or do we wish to improve the quality of Training Packages as the vehicle for dealing with generic skills adequately at all levels of the AQF? Will these skills replace what is currently gained through general education?

"The inclusion of personal characteristics in relation to employment is quite dangerous and may serve to exclude competent people from work on tbe basis of quite discriminatory criteria - what is the right attitude? what is funny? To whom do you owe loyalty?"

There is now considerable experience in writing Training Packages that integrate the underpinning critical skills and knowledge such as literacy and numeracy. This experience could be used to better capture the employability generic skills desired by employers. For example, there are models of writing units of competencies specifying the types of literacy and numeracy practices required for effective workplace communication that do aid training and can be assessed. These may include some core units or involve packaging and co-assessment rules that ensure that generic skills cannot be ignored.

The literature confirms that transitions from education institutions to work are frequently aided by workplace learning or experience, and support the view that the cultural and communication practices of organisations are best learnt as one develops the technical and job related skills.

Bibliography

Curtis,D.and McKenzie, P.(2001) *Employability skills for Australian industry: Literature Review and framework for developmen*t

Field,L.(2001) *Industry Speaks! Skill requirements of leading Australian workplaces.*

These publications can be downloaded from the Department of Education Science and Training web site:
http://www.dest.gov.au/ty/publications/employability_skills/index.htm

Rosa McKenna
Communication in Education & Training P/L
*commet@labyrinth.net.au*

Conference at the Friendship Palace

by Di Dell

nǐ hǎo (Hello)!

The Ninth International Literacy and Education Research Network (LERN) Conference on Learning in China (16-20 July) was held in the Friendship Palace, one of the buildings of the Friendship Hotel. With its restaurants, stalls and shops, gardens and fountains, beer garden, even a supermarket, it was like my own holiday resort. Pity the swimming pool facilities were far away and at extra (and exorbitant) cost - but there were other things to do.

China, as my *Lonely Planet* guidebook announced, was on a high. As a new member of the World Trade Organisation, the host nation of the 2008 Olympic Games and with its first ever football team in the World Cup, it was all happening!
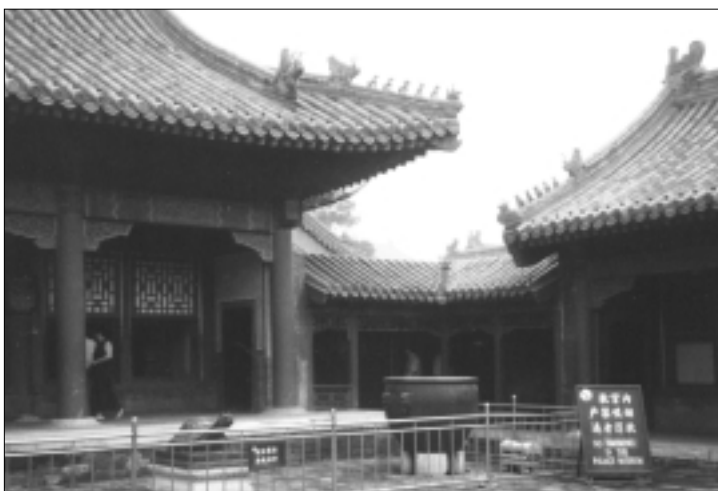
• **Inside the Forbidden City**

The Conference titled *New Learning: Cultures, Technologies, Literacies, Persons* was jointly hosted by Melbourne's RMIT University, and the Beijing Normal University (BNU) in the People's Republic of China. Participants arrived from all over the world: from the UK, USA, Canada, South Africa, Sweden, and New Zealand, to name but a few, with a huge presence from China itself, many being students from the host university. It was these students who ably performed the interpreting at the Conference as we listened on our individual translating machines. There was a large representative group from Australia, particularly from Queensland.

The usual suspects were there, along with many new faces. Plenary speakers included Professor Mary Kalantzis (RMIT Melbourne), Dr Bill Cope (Centre for Workplace Communication and Culture, Melbourne), Professor Michael Apple, Professor James Paul Gee and

Dr Elisabeth Hayes (University of Wisconsin, USA) Professor Sarah Michaels (Clark University, Massachusetts USA), Professor George Tsiakalos (Aristotle University of Thessaloniki, Greece), Professor Gunther Kress (University of London, UK) and Denise Newfield and Pippa Stein (University of Witwatersand, South Africa).

There was an impressive list of Chinese speakers too, including Professor Zhong Binglin, the President of Beijing Normal University, Professor Zhang Zhiliang, President of the National Learning Association, the Vice Minister of the Chinese Ministry of Education, Wang Zhan and various Ministry politicians.

Among the plenary speakers, Kalantzis spoke of the imperative to contribute to an educational agenda, and of a new educational charter put forward by a meeting of university deans. She outlined eight propositions for an educational charter of new learning, noting education's widening role and the growth of the educational sector, and pointing to lifelong and 'lifewide' learning. She emphasised the emergence of new basics in a world where knowledge is highly situational, rapidly changing and diverse in nature, and where technology had the capacity to transform learning relationships. Of particular interest was her position on the changing vocation of teachers, their professional value, and the nature of their transformed work.

Always interesting, Michael Apple was concerned with education as a political activity and with the unequal relationship of education and power. His concern centred on the connection of schools with the labour market, using a metaphor of education as a supermarket where we sell our children as 'capital audiences' to those willing to advertise and buy. Gee gave a thought-provoking account of the learning dynamics of the young people we teach today, including using video games, and the concepts of virtual, real-world and projective identities for learning; indicating that he had, indeed, been drawn in by an arcade game himself! This was continued in a session by Hayes, describing similar gaming experiences as new learning, and talking of a playful world and a shared digital imagination. Fresh and exciting issues for me to ponder.

Kress posed some more thought-provoking and powerful questions in a session about how meaning is made in the media environments of today. He asked whether an image can say the same thing as language can in an era of

multi-modality; and how the change in the media of a page to the screen affects learning. He discussed the significance of design, stressing that textbooks may no longer be written, but rather designed, and dependent on choices of mode and medium - such as CD or book. He pointed to new reading paths where there are a variety of entry points, according to interest, with a greater focus on the power of the reader, rather than the writer. Kress underlined the importance of seeing learning as a social activity, and that there was, therefore, a need to rethink learning.

Learning Conferences are advertised as 'participants' conferences' and there was an extensive choice of parallel presentations of educational practice and research at the Conference as well, highlighted by fascinating and compelling sessions of learning experiences described by presenters from China. There was much to interest me about online learning communities and online discussions, web-based teaching and learning, as well as useful Australian and New Zealand online projects and sites for my students back home.

Apart from plenary presentations, there were research papers, workshop descriptions of practice and informal 'conversation' sessions. I was amused to notice these informal sessions, known as the familiar 'garden' sessions of previous Learning Conferences, moved to the front of the main auditorium (where a few potted plants struggled to survive) as people abandoned the idea that they go outside into the steamy heat. This was to the relief of session speakers (and me too!) who suggested that everyone stay cool, close their eyes and 'imagine' a garden setting.

Learning Conferences are recognised as 'times of affirmation and celebration' as well as 'thoughtful and scholarly occasions', and in Beijing this certainly was the case. It was a community occasion with an arts program of Chinese music, drama, dance and acrobatics from the International Art School of Beijing, and a gala conference dinner (beside 'the sparkling fountains' until it rained!) that included fascinating performances by children and students.

There was also an unexpected and vibrant performance of Salsa dancing the hotel had suddenly arranged! This was not out of keeping with other efforts to be welcoming made by the staff at The Friendship Hotel, who often played music as we had our meals, or waited for sessions to begin. It was strange to hear the familiar strains of The Anniversary Waltz and The Blue Danube in the mix!

Opportunities to network and talk were provided

• **Across Tien'anmen Square**

at the sumptuous international buffet breakfasts and lunches each day. Beijing day tours and post-conference China tours were organised from the hotel as well. We found it easy to hop in a taxi to savour the wonders of ancient Chinese civilisation, though the hotel was some distance from the centre of Beijing.

Armed with just three Chinese words: *hello, thank you* and *beer* (a necessity in such a hot climate, and jolly good local stuff if you could get a really cold one), I took the opportunity to stand on The Great Wall (wobbly as I was), walk across Tian'anmen Square, go the way of royal barges on imperial canals, shop at the antique 'dirt' market and visit The Forbidden City...and an overnight train ride away, the newly-declared eighth wonder of the world: The Terracotta Warriors in Xi'an.

Well done to RMIT and Beijing Normal University. I look forward to the next Learning Conference.

Virtual papers are available on the website: www.LearningConference.com and provide an alternative to travel, but...well... next year it's London...with Cuba waiting in the wings...maybe. I'm saving my pennies.

Di Dell
Adult Basic Education
Sydney Institute,
Petersham TAFE, NSW

For more information on The Learning Conference visit www.LearningConference.com/2002.anz This site exists to facilitate registration for Australian and New Zealand participants and for conference travel packages. Or contact: Common Ground Conferences PO Box K481, Haymarket Sydney 2000 Ph: 02 9787 6762 Email: info@learningconference.com

How WELL are the teachers at Petersham TAFE? —research into workplace teaching

by Ros Hewes & Loo Boothroyd

This article describes a small research project carried out in The Adult Basic Education (ABE) section at Petersham College, Sydney Institute of TAFE NSW, looking into issues related to Workplace teaching. It involved 30 full-time and part-time teachers. Some of the teachers interviewed have been involved in workplace teaching; others have not.

Why research workplace teaching? The ABE section at Petersham has been involved in WELL funded and fee-for-service workplace delivery for a number of years. As Adult Literacy Officers (ALOs) we have managed more than 15 workplace language and literacy projects in a wide range of organisations.

By 2002, the amount of delivery had increased significantly and there was a greater demand for teachers willing to teach off campus in workplaces both in WELL funded and fee-for-service programs. At times, we have felt there was a perception that workplace teaching was too hard, due to issues such as travel, time, working in an unknown environment and not really understanding what the TAFE teacher's role actually is.

As a result we wanted to investigate what perceptions existed amongst the staff about the workplace, to help us work out what was needed to motivate and encourage more staff to become involved in the programs and to support those already there. We also wanted to improve our own practice as project managers. We decided to carry out some qualitative research in our ABE section, using the methodology outlined by Hugh Mackay in *Re-Inventing Australia*, 1993.

> *"...there was a perception that workplace teaching was too hard, due to issues such as travel, time, working in an unknown environment and not really understanding what the TAFE teacher's role actually is."*

We were drawn to this method because qualitative research ventures into, in Mackay's words, 'the more complex and subtle question of why people behave as they do - the area of attitudes, opinions, values and beliefs'. We felt this described exactly what we wanted to explore in relation to attitudes towards teaching in the workplace.

We had the following aims:
- to generate discussion about ABE teachers teaching in the workplace
- to identify issues that concern teachers about workplace learning
- to explore ways of dealing with these issues positively, to develop motivation, curiosity and professional interest
- to increase the pool of workplace teachers

Methodology

Hugh Mackay outlines two techniques in qualitative research, both of which we carried out in the section. These are:
1. non-directive group discussions, and
2. unstructured personal interviews.

In the non-directive group discussion, we found that people liked talking about issues in depth, and this process presented an opportunity to talk and learn. The discussion had a free flowing nature, with one topic flowing easily into another. The fact the interviewer was not controlling the discussion had the effect that people were generous with each other, so even those without immediate workplace teaching needs engaged in a positive and constructive way.

Similarly, in the unstructured personal interviews, the interviewer introduces the topic and encourages the interviewee to talk as long as possible, without responding themselves in any way. Interviewing colleagues using this process was challenging! As interviewers, we found it hard not to respond, and this sometimes felt a bit uncomfortable. We found ourselves wanting to follow up a point, but it was difficult to do so without contributing to the discussion ourselves. Instead, what did prove to be successful was to use reflective listening.

We found the methodology of the 'unstructured interview' and the 'non-directive group discussion' to be valuable, too, as professional development tools. Moreover, it is clear that by using this approach we achieved our first aim, 'to generate discussion about ABE teachers teaching in the workplace'.

After the discussion groups and interviews were completed, we summarised the data collected and presented the findings at a staff development session around the theme of Workplace Teaching. We asked teachers for their recommendations and we are now looking at ways to make some changes to improve the way we

manage the projects and support teachers.

Major findings

The second aim of the project was 'to identify issues that concern teachers about workplace learning'. When analysing the data, it was grouped in themes. These included: structural issues (time, travel and workplace teaching conditions); people (types of students, managers, TAFE teachers and workplace trainers); education and training issues (program content, goals, promotion of programs and negotiation of teaching content) and the workplace environment (the training environment, the sense of belonging, support for teaching, access to key workplace personnel and the need for a 'champion' in the workplace). There was detailed discussion and debate of these points in the interviews and discussion groups.

However, what really emerged was the key theme of what makes a good workplace and what makes a difficult one. From this key theme ideas and feelings developed about the benefits of workplace teaching for the teachers, the benefits to the ABE section as a whole, as well as reasons for not doing workplace teaching.

Teachers saw personal benefits of teaching in the workplace coming from meeting the challenge of doing something new, in an unfamiliar and often very different environment, and being successful with the teaching they provided. They felt they learned a lot from seeing how people in other industries work. Particularly for those who had been in education for a long time, teaching in the workplace was seen as an opportunity to see 'the real world' of manufacturing, community services, hospitality and others.

Teaching in the workplace was viewed as harder than teaching at TAFE. However, it was also seen as making the teacher more employable, as it can provide opportunities to get a job outside education. It was acknowledged that the things that make workplace teaching difficult are also the things that make it interesting, such as the need to adapt to frequent change, in comparison to the classroom which is more static and predictable. For language and literacy teachers, workplace teaching can be rewarding as it can introduce learning to groups of clients who have never had access to any kind of adult education before.

Literacy teachers usually ask 'why am I doing this?' and 'what am I trying to teach?' In the workplace, it is often possible to address the needs of the company and also the needs of the individual. For example, when learning to write technical documents, a student improves

their skills for the workplace, and in addition experiences the specialised attention of one to one learning which invariably has personal outcomes such as confidence building and the ability to manage other tasks better.

The Freirean notion of whether workplace teaching is domesticating or liberating education was discussed. This brought up reasons why some teachers have felt uncomfortable about teaching literacy and language in the workplace. If adult education works on the basis of empowering students, how can this really

"Teachers saw personal benefits of teaching in the workplace coming from meeting the challenge of doing something new, in an unfamiliar and often very different environment…"

happen when you are working to the company's agenda? Matching the philosophy of adult learning to the philosophy of the training agenda can be challenging.

Conclusion

Presenting the issues that have emerged from the research has helped meet the third aim, 'to explore ways of dealing with these issues positively, to develop motivation, curiosity and professional interest'. The research process created a space in which teachers felt valued and were able to explore the specific, nagging issues which frequently arise in workplace programs, as well as space for the discussion of the broader educational and philosophical issues related to workplace teaching. In the current economic and political climate there seems to be so little opportunity to reflect on our practice, exchange views and share experiences. We hope to address this need in a small way through a future professional development.

To further develop the process of engaging teachers' interest in becoming involved in workplace teaching, The Sydney Institute Initiatives Fund is supporting Petersham College to carry out a project entitled 'Workplace Teaching: Orientation and Coaching'. In November 2002, nineteen literacy and language teachers in Sydney Institute of TAFE will have the opportunity to attend professional development for workplace teaching.

We hope the outcome will be the achievement of our fourth goal, to increase the pool of workplace teachers.

Ros Hewes & Loo Boothroyd
Adult Literacy Officers, Petersham Campus,
Sydney Institute of TAFE NSW

What about financial literacy?

—a research project of the Australian Nonprofit Governance and Management Centre

by Sallie Saunders, Maureen Cleary and Betty Johnston

Most people experience a high level of frustration when seeking clarification from accountants and auditors and other financial management 'experts'. This combination of anxiety and frustration often meant that people simply avoided the whole issue of financial management or left it up to one or two people who 'seem to know what they are doing'. The recent spate of corporate collapses (e.g. HIH, FAI, Enron) have clearly demonstrated the dangers of doing that and added to the anxiety already felt by many board members.

The project had two major aims:
- to explore and document the financial management needs and practices (financial numeracy) of particular groups of nonprofit board members
- to develop and trial innovative approaches and resource materials which would address these needs and enable relevant skill development

The research questions which emerged as a result of these aims were:
- What is financial numeracy/financial literacy?
- What constitutes a financially competent nonprofit board?
- How do we get board members interested in financial management and thus prepared to begin the learning process which will render them financially competent members of a nonprofit board?

What is financial numeracy?

There is no one widely agreed definition of financial numeracy. Some definitions focus on financial products, on saving plans and investment, on stocks and bonds. Such definitions imply that financial numeracy is not relevant for people without money to invest, and leave out of the frame a large proportion of the population. Other definitions are less exclusive, recognising that although many people do not have savings or money to invest, they nevertheless have need of financial knowledge and skills. A more generally applicable definition sees financial numeracy as:

the ability to make informed judgements and to take effective decisions regarding the use and management of money (Noctor et al cited in Bond and Boucher, 2000)

This definition allows a central place for context, and implies that financial numeracy will be different for different people in different contexts. There will be no one 'tick list' of skills or knowledge that will apply to all people and all situations. For example, this definition addresses the basic financial numeracy required of board members of Australian organisations, including volunteer members of nonprofit boards. However, in these contexts this basic definition must be expanded to include the ability to comply with the legal responsibilities of corporate governance. It is this expanded definition of financial numeracy which underpins the work of this project.

Elements of financial numeracy education

The literature on adult numeracy education suggests that there are a number of different elements needed to improve numeracy. These include rote skills, but they also and importantly, include conceptual understanding, practical use, and critical awareness of mathematics (Johnston, 1994). It can be assumed that financial numeracy education, as a sub-category of numeracy education, will be a similar exercise in meaning making, specifically in making meaning of practices involving money. It will include similar elements, always remembering that the point of financial numeracy education is to generate 'the ability to make informed judgements and to take effective decisions regarding the use and management of money'.

Skills might be the rote skills involved in calculating interest rates. Conceptual understanding might involve teasing out a mathematical understanding of how extra repayments on a mortgage work. Practical use might enable the reading and understanding of bank statements or mortgage documents, or checking that full

social security entitlements have been paid. However, critical awareness is also an essential part of this extended understanding of financial numeracy. Critical awareness would allow "why?" questions to be asked about bank charges, and bank closures. It would check not just that investment or savings figures were correct, but ask who made decisions about them, and for what reasons.

There are a number of useful numeracy education resources targeted at school children (including websites) and many good courses and resources that focus on particular aspects of financial numeracy. There are not many however that locate their materials within overall social frameworks of understanding, that address a wide range of adult needs, or encourage the kind of questioning that might avoid future HIH type fiascos.

In the UK in February 2000, the Adult Financial Literacy Advisory Group (AdFLAG) was established to consider how to promote better access to financial education to young people and adults. The report focuses on personal financial numeracy, and includes an 'Adult financial literacy framework of skills and knowledge'), which lists nine elements of financial understanding, and teases out what basic and advanced requirements might be for meeting these elements.

These nine elements have been developed and adapted for this project. We have moved from a focus on personal financial numeracy and worked to construct an understanding of what financial numeracy might be for a group, in this case the members of a non-profit board.

DICKSON

Nine Financial Management Competencies

1 The meanings of money
- Understand that money has different meanings in different contexts for different people
- Appreciate the crucial place of money in advancing the mission of the organisation
- Understand themselves as 'protectors of the organisation's assets' and act accordingly.

SEE OVER PAGE

2 The Ethical, Legal and Political Implications of Financial Management
- Understand that there is an ethical dimension to financial decisions
- Understand how local, state and national government policies and laws may affect the finances of the organisation
- Be aware of the contractual obligations associated with financial management

3 Financial Policies and Structures
- Ensure that financial policies reflect the organisation's philosophy and assist it to achieve its goals.
- Understand the role of a finance committee
- Ask questions about and participate in the development of financial policy

4 Planning and Budgeting
- Understand the importance of financial planning and its relationship to the strategic plan
- Understand use of budgets to plan, monitor and control income and expenditure
- Assess financial implications of program choices in terms of the organisation's mission
- Raise questions about the organisation's performance against the strategic and financial plans and the approved budget

5 Understanding Income
- Understand how nonprofit organisations are financed e.g., government grants, philanthropy, fund raising, fee-for-service, sale of products
- Raise questions about the sources and implications of funding and funding relationships.

6 Understanding Expenditure
- Understand the range of organisational expenditures including the importance of having reserves
- Understand how expenditure is managed, including the need for and use of financial controls
- Raise questions about expenditure in order to exercise due diligence

7 Financial Records and Reports
- Understand the various types of financial records and reports and their implications
- Understand the dimensions of an external audit and its implications for the financial policies and structures of the organisations
- Exercise due diligence by seeking clear, accessible and accurate financial reports and satisfactory answers to all questions about those reports and the audit

8 Risk and Return
- Understand the difference between 'good' debt (manageable and planned) and 'bad' debt (unplanned and unmanageable).
- Identify potential financial risks and understand how to protect against them
- Appreciate the importance of well planned investments
- Raise questions about areas of financial risk and investment

9 The Board as Financial Consumer
- Understand that different people may give different advice on finances
- Assess and compare different sources of financial advice and information
- Question and evaluate financial advice

COMPETENCY 1 - The meanings of money

This project argues that the key to engaging the interest of board members (and others) in finding out about financial management is words not numbers. The need to start by talking about money and the complex meanings produced around money in different social relationships has been clearly established in this research. Starting with instrumental calculations and the formal, impersonal language of 'public' money, merely reinforces the fears of financial novices and frustrates the financial explorers into avoidance. Good financial managers know that they must use words as well as numbers in their reports. But in order to enable people to read those reports and ask questions about them so those financial crises are avoided, the (often secret) meanings of money must be discussed and negotiated.

An important source of information and support for this claim came from a group of strong financial managers who were consulted as part of the research. In all cases the motivation for these board members to seriously engage with their financial management responsibilities came from their experiences of a major financial crisis of some sort - usually involving fraud and often involving tens of thousands of dollars. These events shocked the whole financial management issue into the open - people had to start talking about money, their values and attitudes to financial management, the connection between sound financial management and the organisation's mission, and about their needs in relation to further learning. Forcing money talk out into the open has created new possibilities and strengths in all cases.

Activities for exploring COMPETENCY 1: The Meanings of Money

The members of a nonprofit board should be able to:
- Understand that money has different meanings in different contexts for different people
- Appreciate the crucial place of money in advancing the mission of the organisation
- Understand themselves as 'protectors of the organisation's assets' and act accordingly.

Activity 1: More than just a means of exchange
  If asked about the meaning of money, many people define money simply as a means of exchange. But others notice that money is powerfully connected to secrets, emotions, feelings of security or discomfort and so on. These complex aspects of money are different for each individual.

Think about the following questions. How do you and other board members respond to them? What differences emerge which can be discussed?:
- Did you know your parents' income?
- Would you feel uncomfortable if someone else looked into your wallet or purse?
- Do you talk in detail about your income and investments with your friends?
- Do your brothers or sisters know exactly how much you earn?
- Would you feel comfortable asking a close friend or relative how much they earn?
- Do your children know how much you earn?
- Do you know exactly how much your partner earns?
- Would you feel comfortable disclosing your income to other members of the board?

Activity 2: Your money childhood
  Record the messages, lessons and stories about money you heard in childhood. Answering the questions that follow may help you understand how some of your values and attitudes around money have been developed.

- What are some of your earliest memories of money? Who is involved?
- What were your family stories about money (e.g. about your grandfather and the Depression of the 1930s, or the time your aunty had to go on the 'dole')? Were these stories told with an air of approval or disapproval?
- What did your mother have to say about money?
- What did your father have to say about money?
- What feelings and emotions around money stand out for you? Pride, anger, comfort, shame, happiness, deprivation, arguments, worry, joy, envy, sadness, excitement?

(Adapted from The Seven Stages of Money Maturity, George Kinder, 1991, Rider Books.)

Project to develop units of competence in literacy specialist practice for the revised *Training Package for Assessment and Workplace Training*

Lynne Fitzpatrick

Under ANTA policy of 'continuous improvement', Training Packages must be reviewed every three years. The review is usually an intensive and extensive period of consultation. This was certainly the case for the review of the Training Package for Assessment and Workplace Training (AWT). Many readers will be familiar with, and possibly have made contribution to, this review.

In all, 17 recommendations for changes and improvements to the current Training Package were made. (The Stage I report can be found at www.nawt.com.au) Briefly, the thrust of the recommendations is that the Training Package needs to be broadened to reflect the breadth of work undertaken by trainers, assessors and those involved in managing these functions. Many of the recommendations made reference to language, literacy and numeracy issues.

Underpinning generic skills and knowledge, the foundation of which is language, literacy and numeracy, must be integrated into each Unit of Competency, the Assessment Guidelines and reflected in Qualifications Frameworks of Training Packages. This has had a number of consequences for the whole VET sector, including implications for training in training and assessment.

Amongst areas identified as needing attention through the AWT review process are:
- The range of contexts in which VET practitioners now work and the expanding functions that they are performing.
- The capacity of VET practitioners to develop generic skills such as language, literacy and numeracy practices related to the workplace, and within a training culture.
- The development of career pathways for language, literacy and numeracy practitioners, given the lack of definition of 'vocational competency' for this group under the current AQTF.

Stage Two of the AWT review is now under way. This involves the drafting of new Units to meet identified gaps, extensions and revisions to existing Units, a new qualifications model and additional guidance to support quality implementation in the Assessment Guidelines.

Part of Stage Two is to integrate language, literacy and numeracy teaching / training practice via the development of competencies and a possible qualification stream in the revised Training Package. Consultants to this part of the project are Lynne Fitzpatrick & Rosa McKenna of Communication in Education & Training P/L.

The responsibilities of the consultants are to:
- develop new draft units of competence for specialist practice in delivering and developing language, literacy and numeracy skills
- provide advice on improving the identification of language, literacy and numeracy specifications and requirements of the revised competency standards in the Training Package
- provide advice on packaging options for the specialist language, literacy and numeracy units
- provide advice for the assessment guidelines.

Project timeline
The language, literacy and numeracy part of the project commenced in August 2002, and is due for completion in February 2003.

The first stage of the project is to collect information about the range of knowledge and skills required by:
- Teachers of stand alone language, literacy and numeracy courses
- VET teachers delivering/ assessing Communication (etc) units in Training Packages
- VET teachers delivering/ assessing 'technical' Units inclusive of language, literacy and numeracy
- Workplace teachers and assessors delivering/ assessing 'technical' Units inclusive of language, literacy and numeracy
- WELL teachers
- Program managers/ brokers/ language, literacy and numeracy project managers
- Teachers of language, literacy and numeracy teaching courses in tertiary institutions
- Those people who have declared an interest through projects such as NAWT consultations, ANTA AQTF project.

How can you contribute to the project?

If you want to contribute directly to the project, there are a number of opportunities:
- Complete the project questionnaire, which asks your views about the essential skills

ANTA Adult Literacy National Project
2002 INNOVATIVE PROJECTS SUMMARY

Batchelor Institute of Indigenous Tertiary Education
Progressing Numeracy
This project aims to produce a summary of research and best practice undertaken in the field of numeracy education and development that includes Indigenous adults. A set of booklets for Beginning Level 1, Level 1 and Level 2 will also be developed containing sample teaching and assessment tasks addressing the competencies of the numeracy module in the Certificates I & II in Spoken and Written English.
Contact: Robyn Hurley (08) 8939 7374

Canberra Institute of Technology
Using Computers for Numeracy Learning
The project aims to develop a resource in CD form that provides teachers of adult numeracy with both strategies and learner activities in the area of computer-based numeracy learning. The resource will be primarily for teachers but will also provide a wealth of student activities.
Contact: Nancy Veal (02) 6207 4060

Hunter Institute of Technology
Teaching and Learning Resources for Adult Basic Education Students at NRS Level 1 and 2
The project aims to maximise the utility of teaching and learning resources for adults at NRS Competency Level 1 and Level 2 in reading and writing. Project outcomes will include a set of evidence-based guidelines for appropriately categorising sequenced steps of reading and writing skills across all 6 Aspects of Communication within NRS Levels 1 and 2 Competence, master sheets for each individual teaching and learning unit, and pdf files of all micro-teaching and micro-learning units.
Contact: Megan O'Brien (02) 4923 7699

Judith Miralles and Associates Pty Ltd
Improving VET outcomes for trainees from diverse cultural and linguistic backgrounds: A Professional Development Kit
The project aims to improve training outcomes for workers from a language other than English background in the Community and Health Services (CS&H) industry. This will be done by producing professional development materials to support culturally and linguistically inclusive training and assessment in the CS&H Training Package. The resource will include a training/assessment guide, advice on delivery, prototype sample training activities and assessment tasks to support certain Modules and mapped against specific Performance Criteria.
Contact: Judith Miralles (03) 9387 8106

Language Australia
Real texts: Using 'real' texts with adult literacy students
The project aims to produce a resource to support teachers in using 'real' texts with adult literacy learners. In particular, it will support teachers using curriculum such as the Certificates in General Education for Adults that is based around students making meaning out of authentic texts. The resource will show teachers how 'real' texts can be analysed and provide a range of teaching ideas to show how they can be meaningfully used with adult learners.
Contact: Jan Hagston (03) 9612 2640

Language Australia
Science Web – a scientific literacy site for adults
The project aims to i) increase awareness of the place and importance of science, technology and scientific literacy; ii) increase awareness of, and information about, the new Certificates in Science for Adults; and iii) provide support for teachers and trainers in teaching science and technology through a website with integrated literacy, numeracy and science teaching activities and links to other useful websites.
Contact: Dave Tout (03) 9612 2660

Olympic Adult Education
Online Banking Resource
The project aims to create and trial a dynamic web and paper-based resource for adult literacy students around the topic of online banking. The Online Banking Resource will incorporate multimedia, interactivity, constructivist learning activities, and authentic print, audio, visual and web-based texts. More specifically the Online Banking Resource will contain a series of four to six booklets (accompanied by Teacher's Notes) organised around the Certificates in General Education for Adults and mapped against the National Reporting System and a web site containing texts, links and activities to supplement and enhance the paper-based texts.
Contact: Rachel Wilson (03) 9458 2711

SkillsPlus Peninsula Inc.
Moving Memories
The project aims to develop reading, writing and oral communication skills for young people in a participative learning environment, focusing on harnessing young people's existing technological literacy skills. Participants will be encouraged to produce digital stories with the

assistance of mentors and these stories will be distributed electronically.
Contact: John Westley (03) 9781 3388

TAFE NSW (Access Division)
Language, literacy and numeracy resource framework for ANTA Toolboxes
The project aims to develop a report and framework for resource development to enhance relevant existing Toolboxes (particularly within Series 2 and 3) to support language, literacy and numeracy development. The framework will identify the most appropriate way to link resources developed to existing Toolboxes. It will also provide opportunities for customisation to address different learner needs such as learners of language background other than English.
Contact: Cathy Barry (02) 9846 8194

Tropical North Queensland Institute of TAFE
Peer Literacy Tutor Training Video
The project aims to produce the third in a series of videos to support adult literacy tutor training for Indigenous Australians. The major emphasis of the video will be on showing peer tutors how to provide integrated language, literacy and numeracy support. This video will be developed to link with the Certificate III in Volunteer Tutoring (Literacy) and it will be able to be linked to any state based tutoring qualification.
Contact: Mary Brodie (07) 4042 2347

Victoria University of Technology / Language Australia
CGEA on-line: Information, moderation and teaching activities to support the Certificates in General Education for Adults (CGEA)
This jointly run project will provide CGEA teachers with a one-stop shop for the CGEA which will cover information about the curriculum, assessment, delivery strategies, moderation and teaching resources and will provide a common access point for what has been two separate websites – the CGEA website and the CGEA moderation website. The project will also provide a discussion board to allow CGEA teachers to moderate on-line, discuss issues and exchange ideas.
Contact: Jan Hagston (03) 9612 2640

Ministers' Declaration on adult community education

The Adult Community Education Declaration below was endorsed by all Commonwealth, State and Territory Education Ministers at the MCEETYA meeting in Auckland in late July. Most ministers will launch the declaration during Adult Learners Week—2-8 September.

(FINAL DRAFT)

Goal 4—Extend participation in community based learning
Participation in formal post secondary education is unevenly distributed. People with lower levels of educational attainment are least likely to participate in further education and training. People with poor experiences at school and with specific learning needs are also less likely to participate in traditional, institution-based programs and may prefer less formal settings. Adult literacy is a major and immediate priority. We must expand innovative and flexible community based programs and learning opportunities that meet individual learning needs and circumstances.

Enabling strategies:
• Expand adult literacy, numeracy, and information and communication technology programs to provide the foundations for further learning.

• Expand learner centred approaches that build pathways from informal to formal learning and recognise the value of informal learning in building confidence and 'learning to learn' skills in disengaged learners.

• Develop appropriate costing models and target resources to people with the greatest learning needs.

• Ensure that community based programs recognise and address cultural and linguistic diversity.

• Increase the range and flexibility of delivery and assessment options.

• Empower and assist learners to negotiate, choose and manage learning pathways and ensure that resources support learner choice.

• Provide access to information and telecommunication infrastructure and online learning through community settings.

• Work with other agencies to improve and better coordinate support services, including childcare, transport and access for people with disabilities.

• Develop and resource strategies for recognition of prior learning, including informal learning.

literacy contact lists

AUSTRALIAN COUNCIL FOR ADULT LITERACY

President: **Geraldine Castleton**
Griffith University
Centre of Literacy and Language
Education Research
Nathan QLD 4111
Ph: 07 3875 5925
g.castleton@mailbox.gu.edu.au

Vice Pres: **Judy Harwood**
Enterprise and Career Education
Foundation
level 9, 76-80 Clarence St
Sydney NSW 2000
Ph: 02 9299 5899
jharwood@ecef.com.au

Secretary: **Pauline O'Maley**
Ph: 03 9372 0675
Email: omaley@mira.net

Treas: **Suzanne Bozorth Baines**
PO Box 137, Belmont VIC 3216
Ph: 03 5244 2097
kesnsuz@pipeline.com.au

VIC Rep: **Sheryl Sinclair**
Benalla TAFE
Ph: 03 5760 4517
ssinclair@gotafe.vic.edu.au

NSW Rep: **Pat Hazell**
Petersham TAFE
27 Crystal St, Petersham 2049
Ph: (02) 9335 2345
Pat.Hazell@det.nsw.edu.au

ACT Rep: **Christine O'Callaghan**
16 Brunswick St, Kaleen ACT 2617
Ph: 02 6207 4054
christine.o'callaghan@cit.act.edu.au

TAS Rep: **Liz Cooper**
Adult Literacy TAFE
GPO Box 2015 Hobart TAS 7001
Ph: 03 6233 6676
Elizabeth.Cooper@tafe.tas.edu.au

NT Rep: **Lorraine Sushames**
NTU, Casuarina NT 0909
Ph: 08 8946 7219
lorraine.sushames.ntu.edu.au

QLD Rep: **Helen Foley**
Ph: 07 3390 4941
Helen.Foley@detir.qld.gov.au

WA Rep: **Jim Thompson**
Challenger TAFE
15 Grosvenor Street
Beaconsfield WA 6160
Ph: 08 9239 8271
thompj@fremantle.training.wa.gov.au

SA Rep: **Ann Brown**
Ph: 08 8252 2474
Amp@nacys.asn.au

ACAL Executive Support:
Alex Tsakmakis
PO Box 2283, Canberra ACT 2601
Ph: 03 9326 8988
Fax: 03 9326 8670
Mob: 0411 283 163
acal@mira.net

ACAL Co-opted Member:
Cinthia del Grosso
Level 3, 33 Walsh Street
West Melbourne VIC 3003
Ph: 03 9320 4242
cinthia@tdtausralia.com

ACAL Co-opted Member:
Robyn Jay
NSW Adult and Community
Education
Ph: 02 6628 7499
robynjay@iprimus.com.au

State affiliated councils
ACTCAL PO Box 778 Jamison
ACT 2614
Pam.bossard@cit.act.edu.au

NSWALNC
c/o Leslie Stein
leslie.stein@uts.edu.au

NTCAL
t.b.a.

QCAL
PO Box 301 Red Hill Qld 4059
Ph/Fax: 07 3878 9944

Email: qcalau@yahoo.com.au
www.cwpp.slq.qld.gov.au/qcal/

SACAL
PO Box 610, Magill SA 5072
Chrisl@status.net.au
ph: 0417 890 774

TCAL
GPO Box 2015 Hobart Tas. 7001

VALBEC
PO Box 861, Springvale Sth VIC 3172
Ph: 03 9546 6892
Valbec@vicnet.net.au

WAALC
19 Brittain St Como WA 6152
grimsh@midland.training.wa.gov.au

Training Package for Assessment and Workplace Training PROJECT *(continued from page 13)*

and knowledge required to teach language, literacy and numeracy. Encourage colleagues to do the same.

- Send copies of position descriptions from your organisation to the consultants, so that the Key Selection Criteria you think are important are included.
- Keep a diary for a week which lists all your professional activities, (A week in the life of ....) and send to the consultants. Encourage colleagues to do the same.
- If you are teaching/ studying a course in language, literacy and numeracy teaching, send us the course outline.
- Contact your professional association, and ask how you can contribute to any policy statement the association is developing
- Make direct contact with the consultants to make sure you are included in future consultations.

We need to have this information as soon as possible, at the very latest by September 20th. Once this information has been collated and synthesised, a draft framework and sample Units will be developed for consultations in October/ November.

To be sent a questionnaire or to send materials, contact us at:

Communication in Education & Training P/L
36 Milton St, West Melbourne 3003
Ph 03 9326 8369
Fax 03 93268670
commet@labyrinth.net.au

For further information about the progress of this important project watch for updates in professional association newsletters and on web sites.