

Connecting

Literacy



Community

Literacy Specialists:

**Competencies and Practices**

# Literacy Specialists : Competencies and Practices

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# Competencies and Practices

## Summary

The depth and breadth of the literacy specialists' role was clearly demonstrated in Phase 1 of the Connecting Literacy to Community (CLC) Project. Literacy specialists had a wide variety and range of roles and responsibilities that calls for diverse backgrounds and knowledge. However, little was known about the skills, or competencies, which literacy specialists utilize as they go about their day-to-day activities. The purpose of the research component of Phase 2 of the CLC Project was to achieve one of the Key Project Objectives, that of “[examining] the role of the literacy specialists by conducting research with the literacy specialists about how they do their jobs.”

The research was comprised of three steps. The first step focused on identifying the core competencies or skills literacy specialist use. An "Inventory" of competencies, which assumed the literacy specialist's role was that of a coach, facilitator, consultant and champion of literacy, was adapted from a set of core competencies published by the International Coach Federation as well as those from core competency statements published by two Alberta post-secondary institutions. The second step summarized the resulting list into a more manageable inventory of competencies that were necessary or important in order for literacy specialists to accomplish their duties and responsibilities. Lastly, effective practices were identified for use as initial input to a curriculum for a possible Literacy Specialist Training Program.

The results of the research indicated that literacy specialists frequently used and ranked highly the skills of "Setting the Foundation, Co-creating the Relationship, Communicating Effectively, Facilitating Learning and Results, and Personal Effectiveness." Further, they indicated that the competencies were not mutually exclusive but rather interrelated, and used repeatedly as each literacy specialist project unfolds. As well, the literacy specialists indicated that several additional items were very important to the accomplishment of their duties and responsibilities. Among these were:

- Obtaining and using up-to-date information, regarding their respective communities, literacy, and community capacity building / development
- Using personal effectiveness techniques
- Practicing sales and client service techniques
- Facilitating partnerships

Subsequently, six potential Literacy Specialist Training Program curriculum elements were identified:

- Personal Effectiveness Techniques
- Gathering and Using Information
- Relationship Based Sales & Client Service Techniques
- Communicating Effectively

- Facilitating & Enabling Learning & Sustainable Change
- Process & Management Techniques

## 1. Statement of Purpose

### 1.1 Background

Phase 1 of the CLC Project saw five literacy specialists actively engaged in raising awareness of literacy needs and assets in 3 urban and 3 rural communities in southern-Alberta. A portion of the Project involved the literacy specialists in interventions with community based agencies. There, the literacy specialists helped the agencies' management and staff to identify the agency's literacy assets and needs, to develop a set of literacy goals and an action plan, and to facilitate and monitor progress towards accomplishing those goals. What began to emerge from all of these activities was something akin to a community capacity building approach to many aspects of the literacy specialists' work.

As the project progressed, some key questions began to develop among the literacy specialists as well as the Project's coordinator and researcher. What skills do literacy specialists need and use to accomplish their duties and responsibilities? Can a set of effective and innovative practices either be borrowed or be developed that would help to guide both the work of the literacy specialists, and the expectations and actions of community agencies they assist?

### 1.2 Purpose of the Research

The depth and breadth of the literacy specialists' role was clearly demonstrated in Phase 1 of the CLC Project. Literacy specialists had a wide variety and range of roles and responsibilities that called for diverse backgrounds and knowledge. However, little was known about the skills, or competencies, which literacy specialists utilize as they go about their day-to-day activities. Nevertheless, Phase 2 began, as did the first Phase, with a specific set of duties and responsibilities that the literacy specialists were expected to accomplish. The Literacy Specialist Job Description and Qualifications are found in Appendix 1.

The purpose of the research component of Phase 2 of the CLC Project was to achieve one of the Key Project Objectives, that of “[examining] the role of the literacy specialists by conducting research with the literacy specialists about how they do their jobs.”

## 2. Research Methodology

### 2.1 Format of the Research

The research was comprised of three steps. The first step focused on identifying the core competencies or skills literacy specialists use. The second step summarized the resulting list into a more manageable inventory of competencies that were necessary or important in order for literacy specialists to accomplish their duties and responsibilities. Lastly, effective practices were identified for use as initial input to a curriculum for a possible Literacy Specialist Training Program. For the purpose of this research, a competency was defined as a skill, knowledge, learning or behavior that was critical to achieving the role of a literacy specialist and accomplishing the goals of the CLC Project.

### 2.2 Data Collection

In "Step 1", The "Literacy Specialist Competencies – Inventory #1", which is found in Appendix 2, was adapted from a set of core competencies published by the International Coach Federation as well as those from core competency statements published by two Alberta post-secondary institutions. The "Inventory" assumed the literacy specialist's role was that of a coach, facilitator, consultant and champion of literacy. "Inventory #1" was intended to describe the skills used to develop and maintain client-centered relationships, and to design and deliver service and solutions.

At the beginning of Phase 2 of the Project, each literacy specialist was provided with a copy of Inventory #1 and encouraged to make notes or keep a journal to remind themselves of the skills they used as they completed various Project activities.

In "Step 2" the researcher contacted each literacy specialist by telephone, in mid-November and again in mid-December, to complete the competency survey that appears in Appendix 3. The literacy specialists were reminded that the purpose of that activity was not to evaluate their performance but rather to identify and confirm the competencies they use.

Each literacy specialist was asked to reflect on her activities over the previous month in relation to those competencies listed in "Inventory #1" and in relation to achieving the goals of the CLC Project. Further, the literacy specialists were asked to identify the skills used to do their jobs. More specifically, the literacy specialists were asked:

- to comment on how often a skill was used, either "Frequently", "Infrequently", or "Not-at-all";
- to indicate their opinion of the relative importance of each skill;



- to indicate any other skills not listed in the inventory that they drew upon;
- and to indicate if there was a skill, which they felt they lacked or needed in order to do their job more effectively.

In "Step 3", which took place in February of 2003, the literacy specialists along with the Project coordinator and researcher met for a day. A portion of the day's activities focused on validating the information that the literacy specialists provided in each of the telephone surveys and on developing preliminary content for an initial curriculum for a Literacy Specialist Training Program. The "exercise" that was used is presented in Appendix 4.

### 2.3 Analysis

Based on the information provided by the literacy specialists in Steps 1 & 2, the following emerged:

- Literacy specialists most frequently rated all the primary competencies from Inventory #1 (Setting the Foundation, Co-creating the Relationship, Communicating Effectively, Facilitating Learning and Results, and Personal Effectiveness) as "Frequently Used" and "5" or "Important", on a "1" to "5" scale in which "1" was "Not Important" and "5" was "Important", to doing the literacy specialist tasks.
- Some of the sub-attributes such as "Establish the Work Agreement", "Creating Awareness", "Design Actions", and Planning and Goal Setting" were not used as frequently as some of the other sub-attributes depending on the stage of the project as well as the culture and dynamics of both the client's agency and the project.
- These same sub-attributes as well as "Powerful Questioning" were ranked at a "3" or a "4", by some literacy specialists, indicating they were of lower importance.
- The literacy specialists indicated that the competencies were not mutually exclusive but rather interrelated, and used repeatedly as each literacy specialist project unfolds.

Additional comments from the literacy specialists indicated the importance of:

- Using personal effectiveness techniques including, but not limited to:
  - organizational and time management skills
  - setting and accomplishing priorities
  - personal coping, stress management and wellness strategies
  - effective analytical and problem solving skills
  - taking notes; keeping records
- Obtaining and using up-to-date information, regarding their respective communities, literacy, and community development

- Practicing sales and client service techniques
- Developing and maintaining relationships
- Facilitating partnerships
- Facilitating learning and the sustainability of transferred capabilities
- Communicating effectively
- Practicing project process and management techniques

Appendix 5 provides a summary of the comments and additional information provided by the literacy specialists through the November and December telephone conversations. The results of the exercise conducted at the February meeting are found in Appendix 6.

### 3. Discussion and Recommendations

The purpose of the research was to achieve one of the Key Project Objectives, that of “[examining] the role of the literacy specialists by conducting research with the literacy specialists about how they do their jobs.” The research project began with a basic understanding of the depth and breadth of the literacy specialists' role, which developed as Phase 1 of the CLC Project unfolded. The CLC Project, Phase I, was a year of experience for the literacy specialists. Robin Houston-Knopff summarized Phase I in "Connecting Literacy to Community, Final Report - Phase One: Report to the National Literacy Secretariat, July 2002". Those involved in both Phase 1 and Phase 2 of the CLC Project were aware that the literacy specialists had a wide variety and range of roles and responsibilities, which called for diverse backgrounds and knowledge. Nevertheless, little was known about the skills, or competencies, which literacy specialists utilized as they went about their day-to-day activities.

This research project began the process of understanding some of the skills and competencies used by literacy specialists. As well, several elements, which could be used as initial input for a curriculum for a possible Literacy Specialist Training Program, were identified. In both Phases of the Connecting Literacy to Community Project, the literacy specialists indicated the importance of several competencies including clarifying the reason for involvement with the client, co-creating (with the client) the work relationship, communicating effectively, facilitating learning and results, and providing effective and efficient service. Further, the literacy specialists expressed a need for new or enhanced knowledge and abilities in a number of areas. These include gathering and using information about the communities in which they work, literacy, and community development; contacting and following-up with perspective and current clients; adapting to the unique needs of each client; helping the client to sustain new literacy practices; and providing effective services.

The draft "curriculum", which follows, is intended to embody the competencies and the "needs" that the literacy specialist indicated are important for the effective achievement of their duties and responsibilities. In so doing, the curriculum is intended to contribute to the sustainable impact of the literacy specialists' work with their clients.

In no particular order of importance the six (6) interrelated and interconnected elements of a curriculum for a potential Literacy Specialist Training Program are Personal Effectiveness Techniques, Environmental Scanning, Relationship Based Sales & Client Service Techniques, Communicating Effectively, Facilitating & Enabling Learning and Sustainable Change, and Project Process & Management Techniques. Further, this Literacy Specialist Training Program is based on the assumptions that:

- participants will have successfully completed some post-secondary education, a certificate, diploma or degree,
- elements of "Inventory #1" are included in the curriculum, and
- the curriculum has a practical / experiential rather than a theoretical focus.

## **Curriculum Elements of a Potential Literacy Specialist Training Program**

### **1. Personal Effectiveness Techniques**

The literacy specialists identified a number of "foundational values" that a person performing the duties of the position should exhibit. Among these are equality, dignity, helping, and valuing learning. A corresponding "philosophical foundation" for literacy specialists may be found in "Servant Leadership" by Robert Greenleaf. Consistent with the attitudes and actions of the literacy specialist, who participated in Phases 1 and 2 of the CLC Project, as well as the "culture" found in many of the agencies that the literacy specialists worked with, Greenleaf suggests an approach that "supports people who choose to serve first, and then lead as a way of expanding service to individuals and institutions."

Other components of this element could include:

- Organizational and time management skills
- Setting and accomplishing priorities
- Personal coping, stress management and wellness strategies
- Effective analytical and problem solving skills
- The literacy specialist as a professional and an expert

### **2. Gathering and Using Information: Environmental Scanning in Support of the Literacy Specialist's Activities**

The literacy specialists indicated the importance of having up-to-date information concerning the communities in which they were working, as well as regarding the topics of community development and literacy. Accordingly, the curriculum could include effective and efficient techniques for gather information concerning:

- The Community:
  - Organizations and agencies
  - People: "movers and shakers", those in charge, those with "reach" / those who influence, decision makers
  - Social issues
  - Gaps and needs

- Assets and strengths: role models - organizations, programs, individuals; success stories
- Literacy
- Community Capacity Building / Development

### **3. Relationship Based Sales & Client Service Techniques**

The literacy specialists did not initially recognize "sales" as something they do. However, all the literacy specialists understood the importance of and practiced developing and maintaining relationships. In fact developing a relationship based on "trust" was at the core of their activities and enabled them to accomplish so much. With that in mind, following are some components for consideration:

- Viewing, categorizing, understanding the community from two perspectives, literacy and community capacity building
- Identifying potential clients, understanding their circumstances and issues, understanding the client's culture and values
- Categorizing potential clients
- Developing and using support materials
- Making the contact and scheduling a sales call
- Dealing with difficult clients and overcoming obstacles to a sale
- Negotiating the contract and closing the sale
- The Importance of follow-up and servicing clients
- Getting referrals

### **4. Communicating Effectively**

Gathering and giving information is one of the "cornerstones" of the literacy specialists' activities. Some components of this curriculum element are:

- Active listening
- Powerful questioning
- Effective communication
  - Verbal
  - Written
  - Presentations

### **5. Facilitating & Enabling Learning & Sustainable Change**

This element forms the primary "deliverable" of the literacy specialists interaction with a client. Components of this element could include:

- Understanding the client's culture and values

- Overcoming resistance to change
- "Thinking Small" when identifying potential projects
- The importance of communication
- Designing an action plan
- Developing and transferring capability
- Building commitment not merely compliance
- Techniques for facilitating, modeling, mentoring, teaching, and consulting

## 6. Process & Management Techniques

Managing the interaction and activities of each project, from initial contact with the client through to sustainable outcomes, is essential to the literacy specialists' effective and efficient work. Components of this element can include:

- Techniques for: coordinating, managing, directing
- Underpinned by the literacy specialist competencies identified in Inventory #1; the International Coach Federation may be able to provide a source for curriculum as well as existing Bow Valley College curriculum
- "Mapping the Process" from identifying a potential client to project completion

Although something has been learned about how literacy specialists go about accomplishing their duties and responsibilities, opportunities for further projects and research have been identified. An opportunity exists to develop curriculum, and to deliver and evaluate a Pilot Literacy Specialist Training Program.

As well, an opportunity exists to investigate more deeply the literacy specialists' community capacity building role. Two questions come to mind. What might the literacy specialist's potential role be in a community? To what extent can increasing literacy capabilities among community-based agencies and the individuals they serve be linked or integrated with community capacity building?

## Literacy Specialist

### Appendix 1 – Job Description & Qualifications

#### Job Qualifications:

- Education and training in Adult Literacy.
- Strong background in community work with a proven ability to work with individuals, community groups and businesses.
- Creative approach to resource utilization within community.
- Organized and systematic re: records, able to be self-directed, able to report work in an organized systematic fashion.
- Word processing and basic computer skills

#### Job Description:

- Assess the community's literacy needs by contacting groups, services, agencies and businesses.
- Develop and carry out a partnership workplan for the period September 2002 – May 2003
- Participate in team meetings and professional development.
- Report regularly to project manager and research/writer.<sup>1</sup>

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<sup>1</sup> Bow Valley College Connecting Literacy to Community Project Proposal 2002

## Inventory #1

### 1. Setting the Foundation

**Understand and Apply Literacy Specialist Ethics and Standards in all literacy situations.**

**Establish the Work Agreement** - Ability to understand what is required in the Project as well as in the specific literacy specialist – client interaction and to come to agreement with the client about the Project's process and literacy specialist – client relationship

- Understand and effectively discuss with the client the guidelines and specific parameters of the Project and the work relationship (e.g., logistics, scheduling, inclusion of others if appropriate)
- Reach agreement about what is appropriate in the relationship and what is not, what is and is not being offered, and about the client's and literacy specialist's responsibilities
- Determine whether there is an effective match between the literacy specialist's work method and the needs of the prospective client
- Refers the client to another support professional as needed, knowing when this is needed and the available resources.

### 2. Co-creating the Relationship

**Establish Trust with the Client** - Ability to create a safe, supportive environment that produces ongoing mutual respect and trust

- Show genuine concern for the client's welfare and future
- Continuously demonstrate personal integrity, honesty and sincerity
- Establish clear agreements and keep promises
- Demonstrate respect for the client's perceptions, learning style, personal being
- Provide ongoing support for and champion new behaviors and actions, including those involving risk taking and fear of failure
- Ask permission to work with the client in sensitive, new areas.

**Professional Presence** - Ability to be fully conscious and create a spontaneous relationship with the client, employing a style that is open, flexible and confident

- Access own intuition and trusts one's inner knowing - "go with the gut"
- Open to not knowing, and to taking risks



- See many ways to work with the client, and choose in the moment what is most effective
- Use humor effectively to create lightness and energy
- Confidently shift perspectives and experiment with new possibilities for own action
- Demonstrate confidence in working with strong emotions, and can self-manage and not be overpowered or enmeshed by client's emotions.

### 3. Communicating Effectively

**Active Listening** - Ability to focus completely on what the client is saying and is not saying, to understand the meaning of what is said in the context of the client's desires, and to support client self-expression

- Attend to the client and the client's agenda, and not to the literacy specialist's agenda for the client
- Hear the client's concerns, goals, values and beliefs about what is and is not possible
- Distinguish between the words, tone of voice, and body language
- Summarize, paraphrase, reiterate, mirror what the client has said to ensure clarity and understanding
- Encourage, accept, explore and reinforce the client's expression of feelings, perceptions, concerns, beliefs, suggestions, etc.
- Integrate and build on the client's ideas and suggestions
- "Bottom-line" or understand the essence of the client's communication and help the client get there rather than engaging in long descriptive stories
- Allow the client to vent or "clear" the situation without judgment or attachment in order to move on to next steps.

**Powerful Questioning** - Ability to ask questions that reveal the information needed for maximum benefit to the Project, the relationship and the client

- Ask questions that reflect active listening and an understanding of the client's perspective
- Ask questions that evoke discovery, insight, commitment or action (e.g., those that challenge the client's assumptions)
- Ask open-ended questions that create greater clarity, possibility or new learning
- Ask questions that move the client towards what he / she desires, not questions that ask for the client to justify or look backwards.

**Direct Communication** - Ability to communicate effectively during work sessions, and to use language that has the greatest positive impact on the client

- Clear, articulate and direct in sharing and providing feedback
- Reframe and articulate to help the client understand from another perspective what he/she wants or is uncertain about
- Clearly state work / agreement objectives, meeting agenda, purpose of techniques or exercises
- Use language appropriate and respectful to the client (e.g., non-sexist, non-racist, non-technical, non-jargon)
- Use metaphor and analogy to help to illustrate a point or paint a verbal picture.

#### 4. Facilitate Learning and Results

**Creating Awareness** - Ability to integrate and accurately evaluate multiple sources of information, and to make interpretations that help the client to gain awareness and thereby achieve agreed-upon results

- Go beyond what is said in assessing the client's concerns, not getting hooked by the client's description
- Invoke inquiry for greater understanding, awareness and clarity
- Identify for the client his/her underlying concerns, typical and fixed ways of perceiving himself/herself and the world, differences between the facts and the interpretation, disparities between thoughts, feelings and action
- Help the client to discover for themselves the new thoughts, beliefs, perceptions, emotions, moods, etc. that strengthen their ability to take action and achieve what is important to them
- Communicate broader perspectives to the client and inspire commitment to shift their viewpoints and find new possibilities for action
- Help the client to see the different, interrelated factors that affect them and their behaviors (e.g., thoughts, emotions, body, background)
- Express insights to the client in ways that are useful and meaningful for the client
- Identify major strengths vs. major areas for learning and growth, and what is most important to address during the work
- Ask the client to distinguish between trivial and significant issues, situational vs. recurring behaviors, when detecting a separation between what is being stated and what is being done.

**Design Actions** - Ability to create with the client opportunities for ongoing learning, during work/life situations, and for taking new actions that will most effectively lead to agreed-upon results of the Project

- Brainstorm and assist the client to define actions that will enable the client to demonstrate, practice and deepen new learning

- Help the client to focus on and systematically explore specific concerns and opportunities that are central to agreed-upon goals
- Engage the client to explore alternative ideas and solutions, to evaluate options, and to make related decisions
- Promote active experimentation and self-discovery, where the client applies what has been discussed and learned during sessions immediately afterwards in his/her work or life setting
- Celebrate the client's successes and capabilities for future growth
- Challenge the client's assumptions and perspectives to provoke new ideas and find new possibilities for action
- Advocate or bring forward points of view that are aligned with the client's goals and, without attachment, engage the client to consider them
- Help the client "Do It Now" during the work session(s), providing immediate support
- Encourage stretches and challenges, but also a comfortable pace of learning.

**Planning and Goal Setting** - Ability to develop and maintain an effective work plan with the client

- Consolidate collected information and establish a work plan and develop goals with the client that address concerns and major areas for learning and development
- Create a work plan with results that are attainable, measurable, specific and have target dates
- Make plan adjustments as warranted by the course of the Project and by changes in the situation
- Help the client identify and access different resources for learning (e.g., books, other professionals)
- Identify and target early successes that are important to the client.

**Manage Progress and Accountability** - Ability to hold attention on what is important for the client, and to leave responsibility with the client to take action

- Clearly request the client to take action that will move the client toward their stated goals
- Demonstrate follow through by asking the client about those actions that the client committed to during the previous work session(s)
- Acknowledge the client for what they have done, not done, learned or become aware of since the previous session(s)
- Effectively prepare, organize and review with client information obtained during sessions

- Keep the client on track between sessions by holding attention on the work plan and outcomes, agreed-upon course(s) of action, and topics for future session(s)
- Focus on the work plan but is also open to adjusting behaviors and actions based on the coaching process and shifts in direction during sessions
- Move back and forth between the big picture of where the client is heading, setting a context for what is being discussed and where the client wishes to go
- Promote the client's self-discipline and holds the client accountable for what they say they are going to do, for the results of an intended action, or for a specific plan with related time frames
- Develop the client's ability to make decisions, address key concerns, and develop himself/herself (to get feedback, to determine priorities and set the pace of learning, to reflect on and learn from experiences)
- Positively confront the client with the fact that he/she did not take agreed-upon actions.

**5. Personal Effectiveness** - Ability to demonstrate positive personal and professional coping and wellness strategies

- Develop self awareness of necessary personal and professional growth
- Exercise self responsibility for development
- Request and accept feedback constructively and positively and seek to develop skills and/or modify behavior
- Use organizational and time management skills, and to set priorities
- Practice positive personal coping, stress management and wellness strategies
- Demonstrate competency and mastery of job responsibilities
- Use knowledge in the relevant field(s)
- Demonstrate effective analytical and problem solving skills
- Communicate both simple and complex issues clearly and understandably through verbal, written, visual and other means
- Plan and prepare effectively for the tasks
- Prepare and deliver verbal and written reports
- Follow through on work plans, actions, and partnership agreements

**Literacy Specialist Response Form**

Attribute	F/IF/NA	Important (1 – 5)	Comments
Setting the Foundation			
Applying ethics and standards			
Establish the work agreement			
Co-creating the Relationship			
Establish trust with the client			
Professional presence			
Communicating Effectively			
Active listening			
Powerful questioning			
Direct communication			
Facilitating Learning and Results			
Creating awareness			
Design actions			
Planning and goal setting			
Manage progress and accountability			
Personal Effectiveness			
<b>Other Skills Used:</b>			
<b>Skill(s) Needed:</b>			

## Research Component - Literacy Specialists Competencies High River Meeting - February 2003

**Purpose:** This exercise, which is part of the research component of the Literacy project, is intended to:

- confirm and validate the competencies that the literacy specialist reported using; and to
- develop an initial curriculum for a Literacy Specialist Training Program.

**Background:** The purpose of the research component of the Connecting Literacy to Community Project is to achieve one of the Key Project Objectives, that of “[examining] the role of the literacy specialists by conducting research with the literacy specialists about how they do their jobs.” Further, the goal is to attempt to provide input for a possible Literacy Specialist Training Program.

Based on the information provided by the literacy specialists, the following has emerged:

- Literacy specialists most frequently rated all the primary competencies from Inventory #1 (Setting the Foundation, Co-creating the Relationship, Communicating Effectively, Facilitating Learning and Results, and Personal Effectiveness) as "Frequently Used" and "5" or "Important", on a "1" to "5" scale in which "1" was "Not Important" and "5" was "Important", to doing the literacy specialists tasks
- Some of the sub-attributes such as "Establish the Work Agreement", "Creating Awareness", "Design Actions", and Planning and Goal Setting" were not used as frequently as some of the other sub-attributes depending on the stage of the project as well as the culture and dynamics of both the client's agency and the project
- These same sub-attributes as well as "Powerful Questioning" were ranked at a "3" or a "4", by some literacy specialists, indicating they were of lower importance
- The literacy specialists indicated that the competencies are not mutually exclusive but rather interrelated, and used repeatedly as each project unfolds

Additional comments from the literacy specialists indicated the importance of:

- Obtaining and using up-to-date information, regarding their respective communities, literacy, and community development
- Using personal effectiveness techniques including, but not limited to:
  - organizational and time management skills
  - setting and accomplishing priorities
  - personal coping, stress management and wellness strategies
  - effective analytical and problem solving skills
  - taking notes; keeping records
- Practicing sales and client service techniques
- Developing and maintaining partnerships
- Facilitating the sustainability of transferred capabilities
- Communicating effectively
- Facilitating learning
- Practicing project process and management techniques

**Exercise:    Develop a Curriculum for a Literacy Specialist Training Program**

**Prepare:    Role Playing: Literacy Project Director**

You are the head of a literacy project that is intended to increase the literacy capabilities of urban and rural community based agencies as well as the individuals they serve. The project is designed to help as many of those with literacy needs as possible by building and transferring sustainable capability. Funding for your job as Director, as well as this project and for further projects is completely dependent on the success of the current project.

One of the many tasks, which you have to accomplish, is that of recruiting, hiring and training the most qualified literacy specialists possible. These literacy specialists will be responsible for accomplishing the project's goals. If they fail, the project fails and funding as well as your employment will be terminated immediately.

**Step 1: Review the Literacy Specialist Competencies you reported.**

Working individually, review the background information provided above and think back to the telephone "survey" conversations you had in both November and December regarding the competencies you reported using. As well, you may want to refer to your copy of the Literacy Specialist Competencies document that was provided at the October meeting at Bow Valley College.

You might want to jot down a few notes as you use the following questions to help organize your thoughts:

- Which of the competencies are important to you?
- Which ones do you use most often?
- What skills other than those listed in the Competencies Inventory do you use?
- At which competencies, either listed in the Inventory or others, do you find yourself wanting to be more capable?

**Step 2: What Competencies must your Literacy Specialists have?**

Continue to work individually. Based on your experiences as literacy specialist and your notes from Step 1 above, what skills will you want the literacy specialists to be able to use when they begin their work?

**Step 3:** Now as a group, let's articulate the competencies that you will want literacy specialist candidates to demonstrate and that you will enhance through your Literacy Specialist Training Program.

**Step 4:** Develop the preliminary content for a Literacy Specialist Training Program.



## Appendix 5-Literacy Specialist Comments November & December 2002

### Setting the Foundation

- parties must be clear on the objectives / goals of the project
  - establishing trust with the client
  - may take some time to develop and is subject to both timing and agency / client dynamics
  - discussing the role of the literacy specialist
  - reviewing the project
  - assessing and reassessing if there is something that the literacy specialist can do to help
  - developing understanding of literacy in the client and connecting the client with literacy
  - overcoming obstacles / resistance to "sales"
  - the work agreement is an important document to have to refer back to
  - "always need to be my best"
- Applying ethics and standards
    - most conscious of them when I have to say "no"
  - Establish the work agreement

### Co-creating the Relationship

- creates the atmosphere
  - reoccurs with each meeting with the client
  - clearly understanding whom the client is, the client's culture, and what needs and whose "agenda" is being addressed,
  - "if I maintain a relationship with the client it moves the literacy piece forward and leads to other relationships
  - importance of continually nurturing a positive relationship: open, honest, enthusiastic, professional, flexible
  - an ongoing process that occurs with each contact between the client and the literacy specialist, and with taking action on each part of the project
  - importance of establishing project directions and limits particularly when a client leads
  - important to read dynamics of the group
- Establish trust with the client
  - Professional presence
    - important in getting referrals
    - importance of being on time, timely, maintaining confidentiality in order to maintain confidence

## **Communicating Effectively**

- importance of offering ideas to both other literacy specialists and to clients
- important to listen, all the time adjusting to fit the client's needs; the project is limited, but how the client gets what the project offers is wide-open
  
- Active listening
  - important to talk about literacy in a "social way"; quality of and access to service
  
- Powerful questioning
  - questioning for exploration, clarification, and decision making
  - being mindful of asking questions more than giving information
  
- Direct communication
  - providing a clear picture of the literacy specialist's role
  - managing expectations
  - being respectful

## **Facilitating Learning and Results**

- follow-up is critical for checking progress
  
- Creating awareness
  - more important than a "5"
  - by both understanding and by demonstrating where the client are already making and can make additional literacy services available; being able to show the client they are already on the path
  - leading the client to see the extent of the literacy issue
  - ask questions of the organization regarding their clientele
  
- Design actions
  - provide new ideas and action plans with follow-up
  - importance of being able to move to action quickly; simple processes and solutions
  - important to be encouraging and to celebrate successes
  - clarification of who does what is very important
  
- Planning and goal setting
  - important at the beginning to establish a work-plan
  - important to adapt to the client's culture; informal vs. formal

- Manage progress and accountability
  - importance of a champion being available
  - informal or formal depending on the client's view of literacy and the culture of the client's organization
  - importance of feed back and follow-up
  - important in helping to focus on the primary purpose(s) of the project

### **Personal Effectiveness**

- getting feedback is important
- personal responsibility

### **Other Skills Used:**

- motivation
- flexibility and adaptability
- positive thinking
- understanding behaviors - "reading people"
- importance of being patient
- modeling behavior
- not being pushy and aggressive
- broad-based knowledge is important
- knowledge of each community is important: services available; linkages among / between services; barriers to services; dynamics; who's doing development work; who the key players are
- adaptability of both literacy and literacy specialists' needs and processes to meet the client's needs and processes
- personal relationship skills
- keeping records, notes etc.
- partnership building
- helping to identify who would be a good group member
- effective writing and distribution of "messages"

### **Skill(s) Needed:**

- literacy awareness
- community development
- understanding the community that the literacy specialist is working in
- establishing contacts
- doing follow-up
- understanding human behavior
- group facilitation skills
- developing partnerships
- being an effective community developer and delivering that
- different ways of asking questions
- keeping up-to-date with information

## Literacy Specialist Competencies February 2003 Exercise Output

### Community Awareness

#### Dynamics

- politics (the people)
- service agencies
- people play a big role
- main players; "movers & shakers"; decision makers
- know the system the potential client works and lives in
- connections among people

### Analytical Skill

- community
- "what you're doing" - service needs
- decisions around sales, potential clients

### Values

- equality
- human rights
- dignity
- quality of life
- helping
- passionate about literacy
- human value of literacy
- value learning

### Adaptability

Flexibility

Good listener

Creative

Personal presence

Well-rounded approach

Understand and practice learning styles

Teaching / facilitating skills, learning; not doing

Communication skills

Ability to work independently; planning, adapting, clarifying the reason for doing the project

Confidence; risk taker

Cold calling - like an insurance salesman

Initial contact

Develop a plan & follow through; deliver "it"

Knowing how to use the rules of the Project; find a "fit" between the agency needs and the Literacy Project parameters

Agency / client "owns" sustainability

Fostering partnerships

Understand literacy

Understand community development

Willing to learn

Evaluation

Problem solving

Responsive

Self-reflection

Communication

- asking questions

- overcoming road blocks, the "NO"

- giving feedback "evaluation"

Managing relationships

Plan, carryout, evaluate a project; process, formative and summative evaluations

"Knowing the product"

Knowing who to call