



Tipping Points:

NODES OF CHANGE FOR ADULT LITERACY AND EMPLOYMENT

Frank Sligo • Elspeth Tilley • Niki Culligan • Margie Comrie • Franco Vaccarino • John Franklin



Massey University

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Introduction

Both in New Zealand and internationally few major, longitudinal studies have focused on the relationship between adult literacy and employment. The FRST-funded, longitudinal Wanganui Literacy and Employment (L&E) research programme is therefore significant internationally in its comprehensive, multi-method, multi-theoretical approach to this topic. Substantial triangulation of research findings is now occurring because of the large number of methodologies and projects (22) underway, along with associated spin-off studies now being conducted in the Rangitikei, the Manawatu, Wellington (two projects), and Rotorua, all successfully engaging stakeholders in those regions (see <http://literacy.massey.ac.nz/methodologies.html>).

One very positive feature of this research is its primary grounding in Wanganui. Because of this FRST L&E investment, Wanganui has been evolving into a valuable site for literacy and employment-based research. At 45,000, the population is large enough to represent a significant microcosm of New Zealand, e.g., with an aging Pākehā population and a young, growing Māori population. Yet it features excellent inter-agency collaboration among government and community organisations.

A novel feature of this report is that in it we have chosen to foreground a series of actual quotations derived from our interviews with people of low functional literacy in English. All of these interviewees were taking part in adult literacy training courses and were volunteer participants in the Wanganui research.

Each quotation is located within an illustration that depicts one or more persons speaking, featured against photographic backgrounds of Wanganui. The illustrator, Kerry Ann Lee, developed these depicted persons following the actual demographics of our interviewees: ages, gender, ethnicity, etc., though, for reasons of privacy, without knowing the specifics of the individuals originally making the comments.

By this means, following Reason and Hawkins (1988), we sought to create research feedback that was multidimensional in nature and with an element of collaborative practice in it. We felt that depictions of persons speaking were naturalistic and potentially appropriate for employing in later interviews with participants.

The origins of this (and a previous report, *In Their Own Words: Policy Implications from the Wanganui Adult Literacy and Employment Programme*) were that we as researchers were highly impressed with the insights often provided to us by the persons of low formal literacy in English whom we were interviewing. We wanted to find innovative ways to bring these voices to the forefront, to the extent possible, hence have employed this illustrative format to represent our interviewees' words.

In this report, we have followed the structure of the issues that adult literacy training participants themselves told us were most important to them, to create a series of 32 'tipping points', that represent the crux of literacy issues for these people. These points represent the needs, pathways, and barriers to literacy and employment that interviewees told us had changed or were changing their lives.

The report also attempts to take a broad view of many issues around adult literacy and employment, ranging from theoretical questions on the nature of functional literacy, to implications for productivity at work and managers' literacy, to questions of what might it take to create a stronger profession of adult literacy educators. It brings together insights from providers, employers, and the community, to support the points identified as important by adult literacy participants.

Our focus on issues of literacy in the workplace follows the observation from the Workplace Productivity Working Group (2004) that "the important thing in raising the productivity of an economy is to start from the firm level" (p. 25) and "historically, New Zealand has not put the same emphasis on producing improvements in workplace productivity within the firm as it has on establishing the broad regulatory framework for business to operate within, even though workplace productivity is one of the foundations for driving national growth" (p. 21). In our view many elements associated with advancing literacy at all levels are also connected to improved national workplace productivity, and commentary on these is within.

However, literacy is more than about productivity at work. The importance of literacy for all in building a more developed society has often been identified – for example, as stated in a major report on Māori and literacy, *Te Kāwai Ora*, "literacy is, at its very heart, a pivotal component of nation building" (2001, p. 19).

This report clusters the tipping points given by interviewees into four sections (literacy needs, pathways to literacy, barriers to literacy, and barriers to employment). Each of those four sections is further explained by over-viewing the eight points most often raised, in this way depicting a total of 32 of the most frequently mentioned dimensions of adult literacy and employment.

These dimensions were the main ones that emerged during close analysis of our 90 in-depth, one-to-one interviews with people with low functional literacy in English. All these individuals were undertaking further training in adult literacy classes, and all were volunteers in the research programme. Other points were often raised, but these are the issues that recurred often enough to constitute repeated, collective concerns.

Naturally some of these dimensions are more significant or important than others. Yet all of them are meaningful to some, and sometimes to many, of the 90 people whom we met. By depicting these dimensions we hope to sketch out main elements in this fraught and difficult domain of adult literacy. But the reader will also note some overlap among these dimensions, thus suggesting themes, with an element of convergence thereby emerging as similar themes become evident.

Privilege presents as unitary and simple alongside poverty, which is pluralistic and complex, so it is important to note that each person's situation is unique. Therefore, both the causes and correlatives of a person's low functional literacy in English, and their pathway into strong literacy competencies, will vary according to that individual. We believe that these 32 dimensions of low adult literacy in English acknowledge the breadth and scope of the issues, but at the same time signal ways of seeing both the nature of the problem, and ways of addressing it.

All those taking part in this research programme who have had the opportunity to interview people of low functional literacy in English have said it is a privilege to participate in this. We have heard accounts of privation and great achievement. Attaining high levels of literacy is a complex, demanding process at the best of times. When the dice are loaded against a person for numerous socio-economic reasons, their achievements in literacy are even more impressive and admirable.

We hope that these depictions of ordinary citizens speaking their words in everyday Wanganui settings will help to advance their points of view into the

space where they should be, in the foreground of policy consideration and action.

Section A **Literacy Needs** contains the things that interviewees told us they needed, either from literacy training specifically or to move forward with learning in their lives. It contains the subsections of: Formal workplace qualifications, Confidence, Communication skills, Computer skills, Cultural literacy or whakapapa, Number skills, Reading and/or writing, and Learning one on one.

In section B **Pathways to Literacy** interviewees told us about positive experiences that had helped them to learn or to value literacy skills. It contains the subsections of Family/ support environment, How you found this course, Support from teacher or other key person, Goal orientation, Personal recommendation, Work experience, Wish to assist others, and Need for a qualification.

Section C **Barriers to Literacy** contains interviewees' points about what they felt were or had been barriers to learning or literacy in their lives. It possesses the subsections of Health-related or physical, Attitude or motivation, Lack of confidence, Economic barrier, Family environment, Lack of transport or isolation, Goal orientation, and Problems at school.

Section D **Barriers to Employment** identifies what interviewees find prevent them from entering or staying in employment. It has the subsections of Need for formal qualifications, Need for technological skills, Health or physical barrier, Lack of confidence, Jobseekers' attitudes, Need for "3 Rs" literacy, Lack of work experience, and Family commitments.

The term "tipping points" has been used to describe the sense that pressures at a variety of intervals can combine to create a large, seemingly intractable, problem. It has also been used to invoke the sense that changes across a spectrum of points can contribute to broad change. We believe both senses are appropriate to literacy and employment. Clearly, the issues have multiple, and multiply connected, dimensions. Changes are needed at both the micro level, in terms of how individuals are supported, and at the macro level, in respect of how the infrastructure can deliver such support. This report offers suggestions for change at both levels.

Section A. Literacy Needs

A1 Literacy Needs - Formal Workplace Qualifications



Interviewees told us that their number one training need was to achieve a qualification; to “get that piece of paper”.

Increasing workplace demands for qualifications are serving a useful dual purpose. First, they are actually working to focus people on building demonstrable aptitudes, which is necessary in light of increasingly complex tasks and practices required in the 21st century globalising environment. Second, they are creating a heightened awareness among people of low literacy in English that their future prospects of work are increasingly tied up with improved literacy and communication abilities.

The Government's Industry Training Strategy is meant to shape and direct training activities needed to reduce New Zealand's workforce skills deficit. This strategy is not summed up in any single document, but rather is to be inferred from a variety of other policy documents (e.g., Industry Training, Modern Apprenticeships, Gateway, etc.). We also acknowledge the evolving tertiary reforms at the date of writing before government which will result in a new

Tertiary Education Strategy (TES) and Statement of Tertiary Education Priorities.

However, we believe it is necessary for a new Industry Training Strategy, or rather, an Industry Training and Development Strategy, to be developed. This would provide high-level direction for the workforce implications of this important area, to be explicitly linked with the new TES and what we see as a rethought Lifelong Learning Strategy.

This would be one useful step towards integrating the relevant Government strategies that are supposed to create a better-qualified workforce, especially what is currently the Adult Literacy Strategy (ALS), the TES, and the Industry Training Strategy (ITS). All three need to work seamlessly in respect of actual policy, in policy signals received within and beyond Government agencies, and in directing funding.

Presently, however, we see unevenness in these strategies' articulation and their outcomes. In particular, work needs to be done to better encourage lifelong learning, to better define what is being sought here, and how it is to be encouraged. Lifelong learning currently appears more as an optimistic goal, rather than as a set of outcomes which are being pursued by logical and systematic means.

So long as insufficient coordination exists among the government strategies for Adult Literacy, Industry Training, and Tertiary Education, conflicting signals will be given. Consistent alignment is needed for all strategies relevant to education both conceptually and in respect of their direction for funding and practitioner action. In particular, all need a clear and focused orientation to lifelong learning. This will permit consistent signals that the country is serious about lifelong learning and will facilitate this direction with workable funding and training. In the absence of such consistency, clarity of national intention will be absent and progress in the direction of such a goal will be fragmented and uncertain.

The importance of lifelong learning in adult literacy was stressed in *Te Kāwai Ora* (2001): "what is at stake is not just an adult literacy strategy, but a literacy strategy per se. This is what the schools are working towards; it should be the goal that everyone is working towards" (p. 47).

A2 Literacy Needs - Confidence



Interviewees consistently told us that nothing could change for themselves or their communities until low self-belief was addressed.

Confidence in oneself and one's abilities is an important foundation for literacy learning. Conversely, lack of self-belief creates a substantial barrier to acquisition of adult literacy abilities. Low self-belief does not, of course, emerge from nowhere, but instead is painfully instilled over time. Thus it has persisting effects on a person's self-esteem and what they are prepared to venture.

What is needed is no less than a national transition to a society in which the vast majority of citizens have the goal of educational self-cultivation, and seek to attain professional and social success. Also needed is a national belief that persistent effort and self-discipline are worth it, and will have transformational effects in a person's life. We already accept this in respect of sporting success - why don't we believe it in regard to the rest of our lives?

It is often noted that around 20% of school-leavers exit from school without having attained good functional literacy or numeracy. But it is not enough to

load expectations for improving this alone on the over-burdened school system. It is especially parents who, through their strong relational bonds and emotional support, shape their children's achievement for better or ill, particularly in the formative years. Yet parents themselves often need focused support, not just from the state, but by backup from community sources through the networks that comprise (or ideally should comprise) a person's various forms of social capital.

A national transition to a society as pictured above is of course a "huge ask." Some impetus in this direction might be obtained from a sequence of ambitious, multi-method, and enduring social marketing campaigns, e.g. Te Mana campaigns for everybody, aimed in particular at the importance of education both for the young and for lifelong learning. This is needed to build belief and conviction at the level of the individual that education and achievement are needed and linked.

Yet also critical is carefully-targeted reinforcement for such campaigns by a variety of means at the level of community. Community groups' mores and assumptions need to embrace the view that education and success are important. Action at levels of both the individual and their social networks is needed if New Zealand is to make a transition to a genuine learning society and a full participant in the global knowledge economy. Piecemeal, insufficiently focused, essentially uncoordinated policies and programmes will not suffice.

An unaddressed challenge is that for everyone undertaking literacy study, several or many others with low literacy are not yet in training. Culligan, Arnold, Noble, and Sligo (2004) used the 1996 and 2001 Censuses plus the 1996 IALS to build a statistical model to predict the number of people at IALS levels one and two. As at 2001, 1.18 million adults may have had low levels of literacy (levels one and two) and almost three quarters of a million (around 60%) were probably not participating in training (for a summary see *Learning for Living* Issue 2).

People interviewed who were not taking part in literacy training described disrupted schooling, low confidence, and low self esteem. They also need foundation training and lifelong learning. Certainly foundation training in basic literacy skills alone is not enough for individuals, for companies, or for the nation. The current narrowly-focused, short-term adult literacy training system cannot solve the underlying literacy problem or create a basis for lifelong learning.

A3 Literacy Needs - Communication Skills



Many of those whom we interviewed identified better communication and interactional competencies as beneficial outcomes from their literacy studies. They also saw ways in which such abilities are linked to feelings of success or actual promotion at work. Certainly improvements in literacy in the workplace tend to correlate positively with a person's growing ability to suggest improvements, their sense of being trusted to be competent, their openness to say when they do not understand something (instead of feeling the need to conceal their shortcomings), and their ability to interact successfully with others.

When adult literacies are understood as multiple and developing forms of discourse acquisition in differing arenas, then social policy has a better chance of actually having more positive effects. Specialist literacies of course reveal themselves in subtle and diverse ways. For example, a person of apparently lesser status at work may nevertheless be sought out by workmates on account of his or her particular expertise in some area. Their social facilitation skills may facilitate interactions within diverse groups, in this way creating social connectedness and building potentially high levels of bridging social capital.

Successful workplace literacy learning programmes often wisely avoid the label of “a literacy class,” because of the humiliating, persisting stigmas associated with the term literacy. Instead, such classes will often be called “communication development” or some such. There is also justification for this in the often-noted association between literacy learning and development of other, communication-related competency.

The focus on employment outcomes dictated by funding structures however means that functional competencies in literacy are the priority for funding agencies, though they are not necessarily so for those teaching the students. Participants (who may have joined a course for vocational reasons) when asked what they had gained from it, emphasised wider benefits such as enhanced communication with their workmates and families, confidence, and time management, as well as reading, writing, or numeracy. We believe that personal development and foundation abilities as outlined in the Tertiary Education Strategy (Ministry of Education, 2002) are as important for further learning as functional literacy.

All of these aptitudes like communication skills, confidence building, time management and resilience at work are sought by employers. Yet when such outcomes did occur, they were more happenstance and resulting from quality provider teaching, than the outcome of specific lifelong learning policy.

When considering the outcomes of literacy interventions at work, we know that workplaces are sites of complexity, normally resisting easy cause-effect assessments of what outcomes were “caused” by which interventions. Managers need tools that will help them to understand, in multi-faceted conditions of organisational change and development, what correlational rather than causal evidence is available when trying to determine what business benefits are associated with literacy training. Often correlational data is the best available.

In short, the interrelatedness of functional literacy with broader communication skill acquisition needs to be made more visible; to employers, to potential training participants, and to funding bodies. The interpersonal, group, and social communication benefits of training are a massively underutilised selling point of course participation.

A4 Literacy Needs - Computer Skills



Digital literacy is clearly one of the more important clusters of competencies and attributes for the 21st century. And, like many other aptitudes, what a young person grows up with in their home environment and assumes to be normal, will hold no fears for them. Mastering new technology comes relatively easily when a person is surrounded by it from an early age. However, those concerned to put right the “digital divide” often seem to assume that access alone will ensure that communities will become and remain digitally connected.

Our research indicates that Internet access alone is insufficient, and other factors quickly come into play. Even if a family is provided with a computer and a dial-up internet connection for six months, will they have the income to pay the subscription when this period is finished? Is the hardware supplied of sufficient quality to be able to cope with the demands of current software packages? Is there a cultural assumption in that family that computers are a “child’s thing” rather than something in which adults should be interested and in which they should become competent? Is therefore a home computer likely to be located in a child’s bedroom rather than in a central family gathering place?

Nevertheless we have found valuable spin-off benefits occurring when computers appear for the first time in people's homes or other easily-accessible places. For example, our research with some refugee families has indicated that e-mail gives them an opportunity to connect with extended family in other countries, thus serving as an impetus for them to improve their own reading and writing. This communication will usually be in a person's own first language, but literacy gains in one language usually spill over into others.

The national digital strategy needs to be as focused on facilitating users' enduring use of computing, and gaining expertise in its use, as on facilitating access alone. The effects of other variables also need to be taken into account, such as quality of hardware. Machines supplied under initiatives such as the Computers in Homes programme should not be cast-off ones which cope poorly with space-hungry modern software packages. The software should not be "orphan" packages but should be exactly the same as family members will encounter at the local internet café or in use at school. Low-quality hardware and software frustrate users on account of their slowness and error rate, but they also send an implicit message that "you don't deserve better."

The economics of the situation also cannot be ignored. Schemes such as Computers in Homes need to be guaranteed as accessible to the families involved for at least two years, to give time for technological aptitudes to bed in.

Finally, computer literacy is, like enhanced general communication skill, an under-utilised 'selling point' of literacy training. Participants commented that learning to email, or to web-research their genealogy, for example, was a goal, where 'literacy' was not. Once they started to learn, however, literacy gains became apparent, and valuable, to them. Marketing needs to align with the goals with which potential participants themselves identify.

A5 Literacy Needs - Cultural Literacy or Whakapapa



In our view the great majority of people want to feel grounded in their culture, and this security reinforces their sense of capability as learners. In New Zealand, we believe, the most significant leadership in drawing attention to the importance of a sense of being and belonging as a basis for learning has been carried out by Māori.

For example, *Te Kāwai Ora* (2001), a key report on Māori and literacy, defined literacy broadly: "critical themes about literacy (are) the social and historical contexts in which literacy is understood; the skill bases that literacy, when broadly defined, encompasses, and the competencies that the literate person is able to demonstrate" (p. 5).

Te Kāwai Ora commented on the community demand to learn te reo Māori, seen as representing an advance towards achieving biliteracy. It quoted experienced tutors in literacy as saying that the starting place for successful Māori literacy programmes was:

the students, their whakapapa, their self-esteem and confidence. Learning to whakapapa is the most important thing to learn. It opens up the whole person. From there tutors can talk to them and introduce basics: once they start talking the students are like a sponge; they have lots of skills already and others that they have missed out on (p. 31).

The report went on to note that, on the issue of what is Māori literacy:

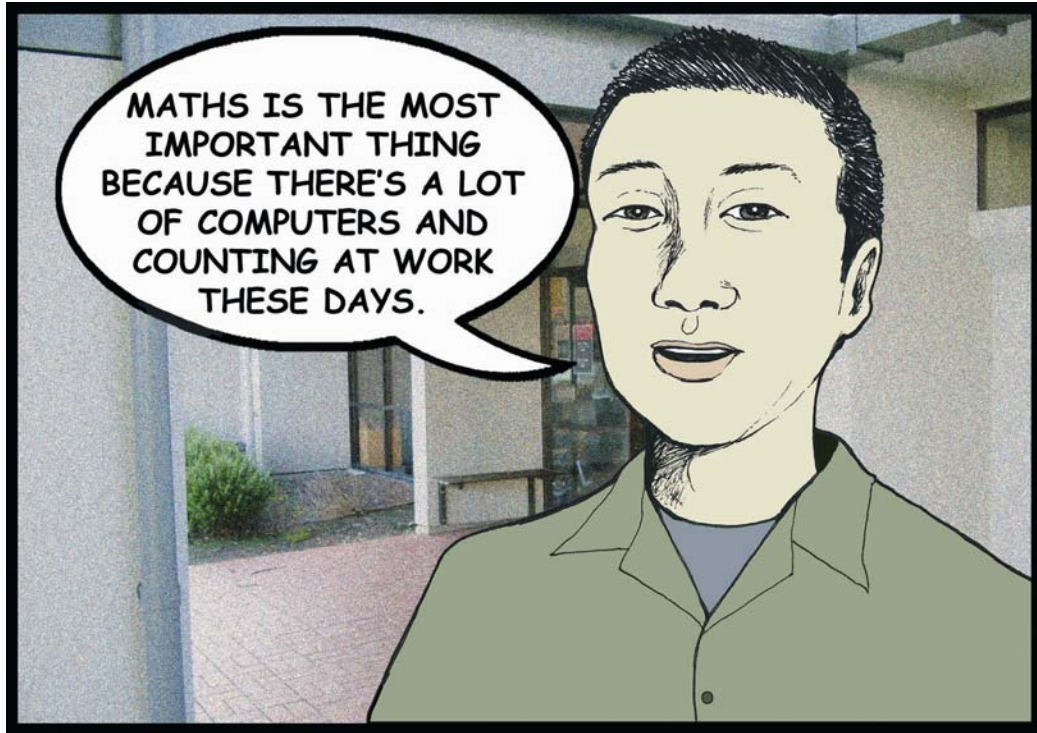
literacy programmes for Māori are not only about reading and writing, which are associated with 'reading the word', though they include this. They are also about outcomes that show that people have increased cultural and political knowledge. As well as knowing how to speak te reo this includes knowledge about whakapapa, knowledge about who you are and where you come from. When asked "What is it about learning te reo that is a literacy outcome?" the answer lies in the ability for Māori to be able to read the Māori world view (p. 35).

The report culminated in four major recommendations:

1. That the Adult Literacy Strategy, as articulated in *More Than Words*, is reconceptualised and rewritten forthwith;
2. That the new strategy views education and literacy more broadly;
3. That literacy in Aotearoa is redefined in the new strategy as a Treaty-based concept of biliteracy, based in te reo Māori and the English language;
4. That literacy is defined in the new strategy thus: "Literacy is the lifelong journey of building the capacity to 'read' and shape Māori and other worlds" (p. 4).

Our research supports these recommendations and indicates that cultural literacy is important as a motivating factor to adult learners from a diverse range of cultural backgrounds. As mentioned, adult learners were inspired to become computer literate, for example, by a desire to establish family genealogy. Again, these motivational triggers need to be transformed from happenstance to systematic in the ways that training is provided and promoted.

A6 Literacy Needs - Number Skills



Our interviewees were well aware of the importance of numeracy not just for its own sake but because of its interactions with many other developing features of the workplace, especially the required expertise with new technology. Also, we found no indications of anyone thinking that the advent of computers at virtually all points in the workplace meant that they did not have to learn the fundamentals of maths in the sense of being familiar with basic arithmetical operations, or how to think in mathematical terms. People at work still have to be sufficiently experienced in handling numbers to have an intuitive or big picture grasp of what a sensible outcome from a particular calculation is likely to be.

The Workplace Productivity Working Group (WPWG) report (2004) comments that "To fully realise workplace productivity improvements in New Zealand firms will require much more widespread adoption of effective measurement and reporting practices" (p. 11). That is, forms of numeracy are needed beyond just facility with numbers. What is needed is an orientation to measurement at all levels of the enterprise, with people having confidence in their ability to handle numbers. Also required is a shared understanding throughout the firm

that it is through measuring and monitoring that you really get to understand your business and obtain a valid evidential basis for creating ongoing improvements.

The WPWG report goes on to say that following the practice of measurement throughout the firm, there needs to be a commitment “to communicating the results in a transparent way that relates individual and team performance to the overall business performance” (p. 12). This of course is one important intersection between numeracy and literacy. At this point, discovery of numbers turns into communication of numbers and the implications arising from them.

Nevertheless, this communication is a sophisticated and demanding process for managers and team leaders or, even, potentially anyone at work. This is because such communication tasks demand the ability to formulate different messages, often written, for varying levels and specialisations. There is no use assuming that a message formulated for the Board is necessarily the one best suited to the Chief Financial Officer, or to an assembly-line team. Yet all three may well need to obtain insights into different aspects of the data that have been identified through process monitoring.

A confounding factor is that people of lower functional literacy may have a poor sense of how adequate or otherwise their capabilities are, and whether action is needed to upgrade their competencies. It is of concern that in the 1996 International Adult Literacy Survey most New Zealanders at IALS level one rated their own literacy skills as either excellent or good (Johnston, 2004, p. 12). Level one is of course bottom-ranked: “People at this level have very poor skills, and could be expected to experience considerable difficulties in using many of the printed materials that may be encountered in daily life” (Ministry of Education, 2001, p. 23).

This suggests a fundamental lack of understanding both in the community and at the level of the firm of what good or excellent literacy actually comprises. Also indicated is the desirability of raising awareness of how to diagnose undeveloped capabilities and what to do about it. Strategies are needed to more clearly link numeracy skills to personal and organisational outcomes right across the board. In the same way that the Retirement Commission’s ‘Sorted’ campaign, for example, has made financial literacy a desirable attribute (made it ‘cool’ to be money savvy), numeracy needs to be positioned in relationship to profitability or other outcomes, not as an end in itself, right from early schooling on.

A7 Literacy Needs - Reading and/or Writing



The focus on literacy at work often falls upon shop floor workers or other front-line staff. Yet in an increasingly sophisticated, technology-dependent, globalising world, everyone, including supervisors and managers, needs good literacy.

The WPWG report (Workplace Productivity Working Group, 2004) comments that "there is a widespread perception, although little hard evidence, that weaknesses exist in the quality and quantity of New Zealand's stock of leadership and management capability" (p. 48). However the 1996 NZ IALS indicates that of people currently or recently in employment designated as "Legislators, Professionals, Associate Professionals, Technicians, Senior Officials and Managers", about 29% were of low (IALS levels one and two) document literacy. (Document literacy refers to "the knowledge and skills required to locate and use information contained in various formats, including job applications, payroll forms, transportation schedules, maps, tables and charts" (OECD, 2000, px)). This compares with around 44% of the full-time or part-time New Zealand workforce being at document literacy levels one and two.

If managers generally are characteristic of this professionals-managers group, then it is of concern if nearly 30% of them are at levels one or two on a five point scale. Level one is described as “of very poor skills ... considerable difficulties in using many of the printed materials that may be encountered in daily life.” Level two indicates “may be able to use some printed material but this would generally be relatively simple” (Ministry of Education, 2001, p. 23).

Further analysis of the NZ IALS data indicates that also using the document literacy measurement, of this same professionals-managers group, over 43% were at IALS level three, where “people at this level would not be able to use all printed material with a high level of proficiency” (Ministry of Education, 2001, p. 23). Assessments of managers’ prose and numerical literacy indicated a little fewer at levels one and two, but a similar proportion at level three.

To what extent, then, can managers mainly without high literacy skills (including problem-solving attributes) successfully institute innovative, fleet-of-foot strategies for workplace contingencies? It could be that their teams will comprise workers with the same low level of literacy or lower literacy again.

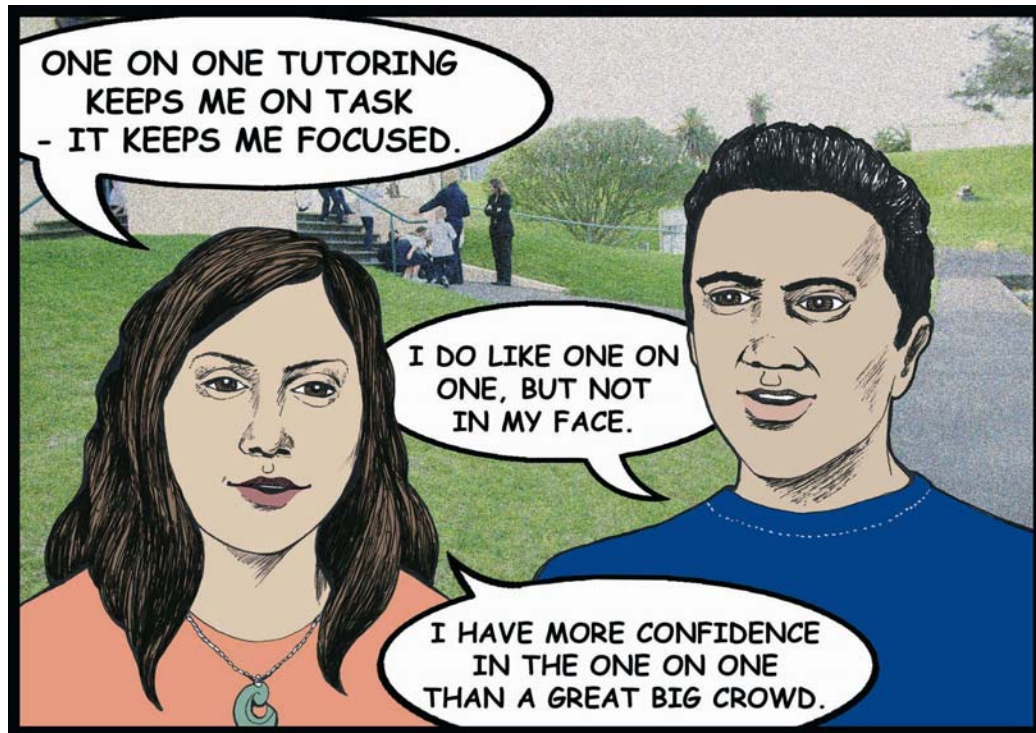
All this does not auger especially well for the ability of New Zealand managers to be highly responsive to a complex, literate, print-dominated world. Literacy is of course not to be equated with intelligence. Yet it will bear some relationship to the subtle, intellectual decision-making capabilities associated with education. As the WPWG report points out, “most increases in productivity ... come from advances in knowledge, and in improvements in the application of knowledge” (p. 35) while “tacit and/or diffuse information may be particularly difficult to acquire” (p. 37). Well-educated, literate people are better-placed to find then apply critical new knowledge, even when it is hard to come by.

But is it not true that New Zealanders like new technology, being “early adopters and good adaptors of technology” (Workplace Productivity Working Group, 2004, p. 63)? Perhaps so, but we also appear to be less capable at deriving added value from the employment of technology through clever design work or through understanding how to sell into niche markets. This “can consign New Zealand firms to selling more on price than value” (p. 63).

What we see as a gap between adoption plus some adaptation of new technologies, and creative leveraging off them, relates, we think, to the relative absence of higher-order literacies, plus inadequate systems for innovation and continuous improvements at the level of the firm. Firms which recognise the link between higher-order literacies and productivity stand to gain competitive

advantage. To translate such recognition into change, however, the stigma associated with literacy and literacy training will need to be addressed. Rebranding literacy as communication may offer part of the solution.

A8 Literacy Needs - Learning One to One



Our interviewees expressed varying perspectives on whether learning should occur one-to-one, or whether taking part in a class with others was sufficient. The most vulnerable individuals with very low confidence needed significant support in becoming competent adult learners. Before much progress could be made with literacy, people needed to build their communication competencies, self-esteem and self-confidence. On this basis a feeling of success and preparedness for learning could start to emerge.

In most cases our interviewees had unhappy memories of failure at school. Yet in many instances they could work through these anxieties when they realised that this new literacy learning experience was very different to school. As they gradually came to this realisation, some one-to-one work might be needed.

But whether teaching was one to one or in a classroom style, we found it important that the provider should not inadvertently reawaken a learner's old apprehensions about being picked on or of feeling inadequate if not knowing the right answer. Sometimes learners felt there was safety in numbers in the

classroom. However, those numbers should not be so great as to replicate learners' old patterns of "hiding" from interactions with tutors or co-learners.

It is normal for a wide range of abilities to occur in a given group of learners. If it is evident to the provider that one or several persons are slipping behind, special one-to-one provision is needed if previous gains are to be maintained. Thus no exact prescription is possible on whether new literacy learners need one-to-one or group-based learning. Yet for more vulnerable learners, and if progress is slower, there needs to be provision for one-to-one support. Funding mechanisms need to be flexible enough to respond appropriately.

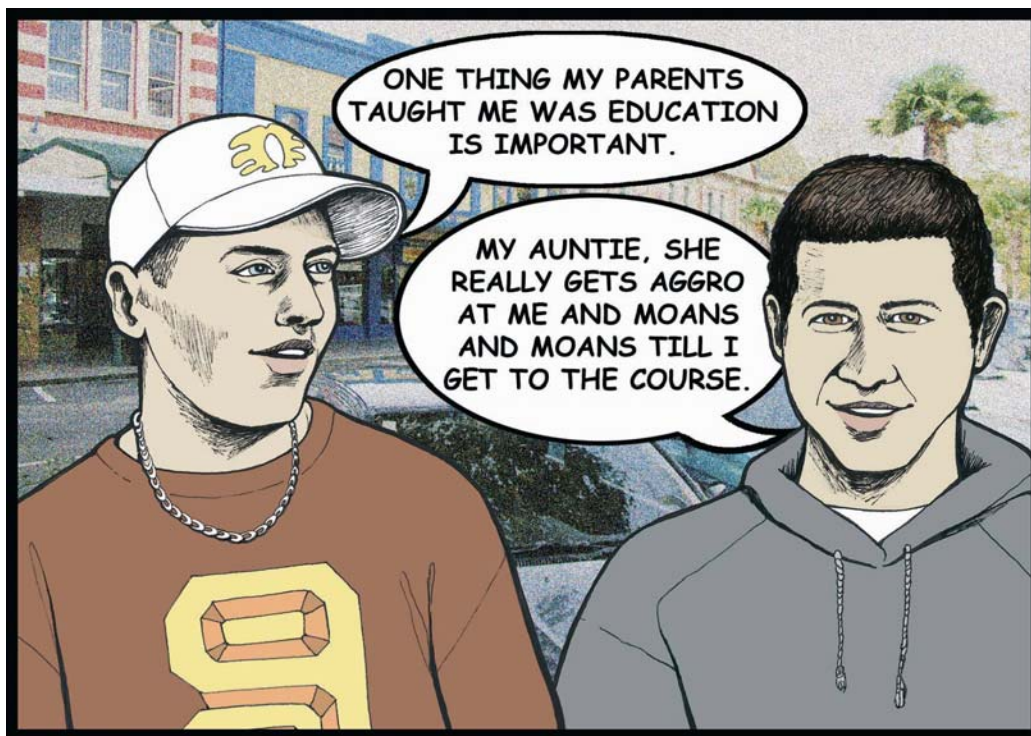
Policy-makers may struggle with how to measure the benefits of "soft" skills like confidence, self-esteem, or better communication skills. Yet without such soft skills development, literacy development is unlikely to follow. Then the interplay between soft skills and a person's early development of literacy indicates what form of learning is needed for that individual.

Predictably no causal relationships will be discernable between literacy and soft skills training within enterprises. In the absence of quantitative ways to measure soft skills outcomes, qualitative assessments should be sought. Indeed, some providers gather observational and self-report data to substantiate quantitative data sent to funding agencies. Other potential qualitative approaches to measuring soft skills may include correlational studies of soft skills development and beneficial work outcomes such as better problem identification; an increase in suggestion scheme proposals, and more workable proposals from such schemes; testimonials from managers and staff; or case studies and incident studies of benefits linked to literacy learning.

Policy needs to be flexible enough so that the provider has the ability to demonstrate that for any given learner, one-to-one support is needed. The necessity for pedagogical decisions about the relative value of one-to-one or group, underline the importance that literacy providers should in fact be permitted to act and be regarded as professionals. Yet the current situation features a *mélange* of providers working to competitively sought, short-term contracts (often of only one year's duration) oriented to economic-related outputs. Only when literacy provision has evolved to the next level of professional development will appropriate decisions be made on a case by case basis on which form of learning is best suited to the individual who presents for literacy training.

Section B. Pathways to Literacy

B1 Pathways to Literacy - Family/ Support Environment



Support for a person's educational aspirations comes most immediately from the people who are closest in one's life. These comprise our bonding or relational social capital. The importance of social capital is reinforced by the recent Growth & Innovation Advisory Board study (2004) which found that New Zealanders' personal networks are the most critical:

New Zealanders respond strongly to those around them to motivate their personal and professional lives ... they respond less well to national or remote figures or information they cannot trust by referencing through people close by them ... (therefore) any strategy to encourage a growth and innovation culture must operate through networks close to people, through trusted relationships (p. 14).

However, such relationships may well be problematic. Social capital researchers draw a distinction between bonding and bridging social capital (Putnam, 2000). A person's reliance on those closest to him or her (bonding capital) con-

tains significant dangers of failing to take into account broader perspectives from possibly better-informed people outside one's own personal network (bridging capital).

In this way a group of similarly narrowly-informed individuals can reinforce their own collective stereotypes and never become open to fresh perspectives from external sources. The individual or the firm may become undermined in the absence of understanding or acceptance of the need to continually upgrade competencies. The challenge becomes one of how to infiltrate new and productive ideas into this tight circle of trusted friendships.

The report of the Workplace Productivity Working Group (2004) is probably referring obliquely to this national proclivity, in the observation that "many New Zealand firms are either reluctant or unable to enter into more structured collaborative arrangements, beyond a transactional nature, or they view collaboration with a very narrow focus" (p. 63).

Prior to his influential *Bowling Alone* (2000), Putnam's (1993) analysis of social capital in southern and northern Italy linked the north's greater prosperity to its stronger sets of bridging capital. In contrast, the relative poverty of the Italian south was said to stem from a relative absence of associative social capital.

Some research has been done relevant to social capital in New Zealand (Codd, 1998; Guerin, 1997; Hazeldine, 1998; Healey, n.d.; Maharey, 2001; Robinson, 2002; Strathdee, 2003; Strathdee & Hughes, 2000). But because there is no one form of social capital (Strathdee, 2003) and commentators are divided on how social capital is to be conceptualised and operationalised (Cohen & Fields, 1999), more New Zealand-specific research is needed into relationships among social capital and development at the level of the firm and the community.

B2 Pathways to Literacy - How You Found This Course



Our interviewees described many and varied pathways into learning. Often interpersonal contact with others formed an important element in a person's decision to undertake a particular course. Future research needs to investigate the dynamics of bonding and bridging ties along with relationships of trust, which comprise an individual's social capital. This is with the goal of enabling us to better understand the mechanisms by which some people learn about courses and their positive features while others, equally likely to benefit, never come into the loop.

If adult literacy policy is to be truly inclusive, it needs to contain the where-withal to market courses to potential participants in ways that that they find attractive and engaging. Marketing and promotion also need to leverage off the important dimension of peer sanction so that interpersonal networks continue to do the work of attracting participants. They also must permit genuine insights into the excellent depth and range of learning available from many courses.

As already noted, most New Zealanders at IALS level one (the bottom-ranked tier) rated their own literacy skills as either excellent or good (Johnston, 2004, p. 12). In complementary fashion, it was interesting to learn from our Wanganui community survey that most community members took adult literacy for granted and assumed that pretty much everyone possessed such abilities.

Predictably for a community that had little understanding of literacy problems, our survey respondents lacked awareness of literacy providers where people with problems could go for assistance. Interestingly, our interviews with providers revealed that gaining support and recognition from the wider community could make their job of adult literacy provision easier, partly through promotion which, in turn, may alter the stigma associated with having low levels of literacy.

It may be recalled that a rose-tinted view of national literacy abilities was the mindset among most, even educators, prior to the news from the 1996 IALS which revealed widespread problems with the population's level of literacy capabilities suitable for modern and complex work environments. These factors come together to indicate the importance of creating general awareness of what excellent literacy comprises, and destigmatising those seeking to improve their literacy levels.

We believe that if policy is to drive the formation of a high social command of literacy, then both the government and providers need to raise community awareness of adult literacy as an issue in our society and a basic prerequisite to employment. Such campaigns need to emphasise that literacy is not a have / have not quality. Society does not comprise literates and illiterates but a continuum of literacy gains along which *everyone* can potentially benefit from moving. Removing the spotlight from those with low functional literacy and emphasising developing multiple literacies as a collective goal will help to address the stigmatisation that many of our respondents reported, either from others, or in their own attitudes, around literacy training.

B3 Pathways to Literacy - Support from Teacher or Other Key Person



The influence of a sympathetic teacher was especially important if other aspects of a person's life had not been going well – such as if poor health had impeded learning or if home was not especially encouraging to literacy learning.

As ever, family were critical in shaping a young person's sense of what they could do and be in their lives. This research strongly reinforces the importance of students completing their secondary schooling as a means of attempting to break cycles of disadvantage. For some time now a statistic mentioned in educational circles is that around 20 per cent of school leavers have poor literacy and numeracy. In validation of this, the 2004 NCEA results showed that 21 per cent of school leavers had less than level 1 of the NCEA. In all 13 per cent had no or fewer than 14 credits, and eight per cent had 14 credits but had not achieved NCEA level 1. Commenting on these figures, Education Review Office CEO Karen Sewell reportedly stated that "When students are not doing as well as they could, it won't be because they, their parents, or their schools don't want them to do well, it's because we are not teaching them well enough" (*Select committee targets*, 2006, p. 3).

Wanganui employers still lack understanding of the NZQA qualifications system. They seek straightforward benchmarks, e.g., pass or fail statistics, to give them insights into how to rate a job applicant. Especially small employers are confused about what they perceive as a large number of unit standards and modules in the new apprenticeship system. The hectic pace and pressures inherent in running a small business leave little time to make sense of complex bureaucratic systems. Employers seek simplification, and ask that NZQA undertake a more client-focused approach.

This would mean NZQA adapting itself to workplace realities, rather than expecting all workplaces to accommodate themselves to NZQA systems. However, we believe that NCEA is finding some slow and gradual acceptance among some employers. Wanganui literacy providers agreed that employers sought a vocational or functional approach to workplace literacy, which they were generally happy to provide, noting that courses which resulted in a qualification or practical outcome possessed a strong appeal to learners. Yet their important caveat was that learners with literacy abilities lower than the rest of their vocational class also had to be catered for, as noted elsewhere in this report.

Practitioners interviewed agree with the Ministry of Education that effective teaching might well feature “explicit teaching of literacy” (Ministry of Education, 2005a, p. 4). To meet individual needs, literacy learning as such needs particular attention even though for the most part it is also true that such teaching has to be geared to “the motivation and interests of learners” (p. 4).

One problem with a vocational-focused literacy policy is that no-one can claim to have a good grasp of the needs of industry in the medium term. In a rapidly changing world, new job categories and requirements are emerging all the time so human capital development targeted only at existing vocational needs is, in effect, planning for the past. Effective literacy policy is needed that genuinely does build adaptable, connected, and confident citizens with a high level of problem-solving and analytical abilities.

Workplaces need competency training across the spectrum of needs to reduce the separation between literacy and employment and the conflicts that training participants feel between finding time for work and time for study. Training everybody (including managers) in accordance with their needs avoids stigmatisation.

B4 Pathways to Literacy - Goal Orientation



For many of our interviewees, an impetus in their becoming engaged in literacy learning was when some kind of goal orientation kicked in for them. Sources of such a goal were diverse, ranging from a newly identified desirable career or occupation, rejection of continued low income, a sense of family obligation or need to serve others' needs, personal maturation that seemed to take them across a psychological or emotional threshold, a friend telling them how delighted they were with literacy training, or encouragement from a trusted other such as a family member. In other instances, these learners became goal-oriented after entering literacy training, especially in the case of people who came to a course because they were required to do so.

Often this goal orientation occurred in what we thought of as a multiplier effect, enhanced by some other motivator such as indicated above. Two or three motivators coming together reinforce a person's openness to learning and collectively build their persistence in literacy development. However, we could discern no pattern or patterns, so that a person's transition into possessing a goal orientation was usually serendipitous and therefore unpredictable.

We believe that comprehensive directional support systems are needed, including counselling for career and life direction, and ways by which people can access strong role models. An important element in strengthening and formalising an individual's goal orientation is personal development plans.

Elsewhere, for example, in the UK, a trend has been noted such as in larger organisations for personal development plans (Personal development plans, n.d.). These are a means whereby individuals take responsibility for their own professional or personal target, but are supported in doing so. This concept may be similarly employed in terms of lifelong learning, in a myriad of settings, including workplaces, throughout this country (and has been undertaken through personal pathway plans by some adult literacy providers) as a focused way to help literacy learners more clearly define their personal aspirations, then reach them. Again, this could be a component of embedded training, setting personal goals for staff at all levels of an organisation.

In our view the beneficial processes and outcomes introduced by inspirational role models are too important to be left to chance. Personal development plans could help to change luck or chance processes into a more formalised part of a person's development.

B5 Pathways to Literacy - Personal Recommendation



Word of mouth was a highly important means whereby our interviewees found out about literacy learning and started to comprehend its benefits. The people from whom this information came tended to be a person's most trusted friends and acquaintances.

However we found major mismatches between what individuals originally thought literacy comprised, and the actual growth and development that they ultimately realised were entailed once learning was underway. When we asked questions such as "what does the word 'literacy' mean to you?" we found that for many people the term literacy literally possessed little or no denotative meaning. Sometimes there were echoes of an outmoded view of literacy as meaning the 3Rs. For other people it had a negative set of connotations involving unhappy memories of failure at school, so that literacy classes were feared and to be avoided.

Thus, in general, mental associations with literacy were either a blank, or negative in character. This contrasted vastly with the relief and pleasure with which

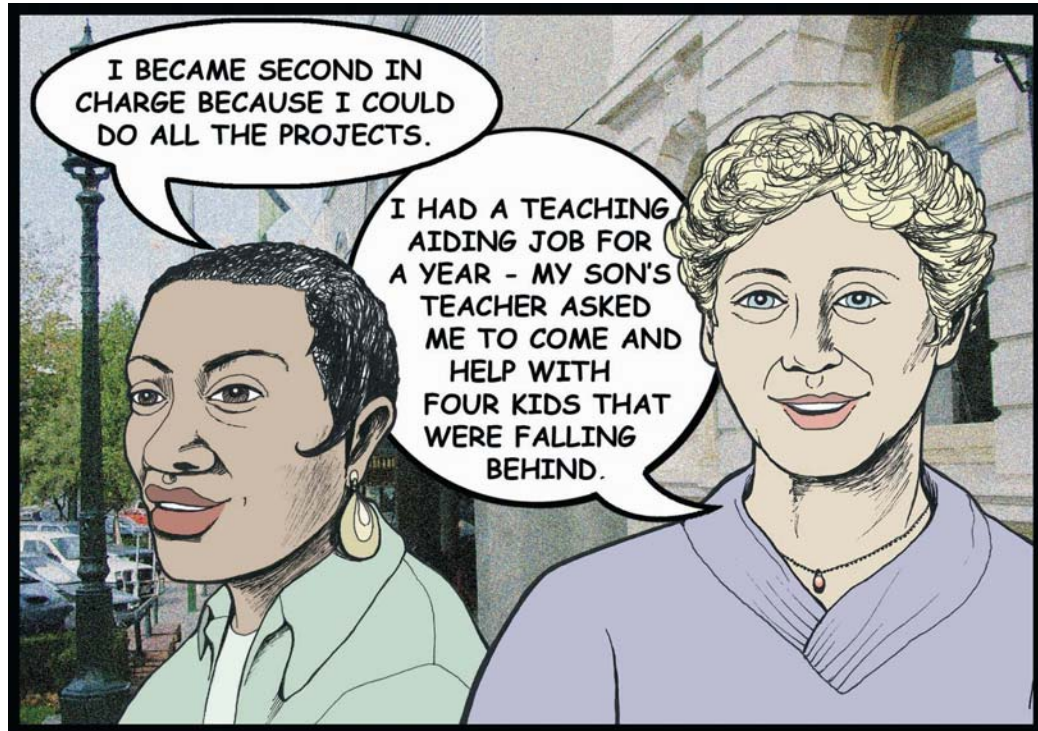
most interviewees ultimately came to think of literacy training once they had encountered it.

It is also of concern that recruitment into literacy training is often insufficiently structured, with more to be done to deliberately target potential participants. Especially considering how enthusiastic our interviewees were about the transformational outcomes they experienced, we believe that many possibilities exist for systematic marketing and promotion of literacy courses.

To date that potential remains unrealised. Literacy providers themselves generally do not have the funding or the expertise to engage in good quality marketing. Provider organisations tend to be fragmented and necessarily focused on short to medium term survival, and so, realistically, can undertake little promotional work. In our assessment, the competitive nature of provider funding makes it difficult or even impossible for them to deploy resources and energies to publicising their programmes in the community.

Nor were employers well aware of who the literacy training providers were, or what they offered. Even if they did have some knowledge of providers, employers did not know how to select from them. However, they did know that they needed to work with a provider who would carry through training with the individual to the workplace. Many respondents indicated that it was difficult for them to obtain time off work for training.

B6 Pathways to Literacy - Work Experience



From an organisational standpoint, transaction and compliance costs (such as costs of supervision and quality monitoring) diminish as staff develop new competencies. These include the ability to participate in successful self-managing teams and carry out by informal means control and quality functions. In this way the national need to upskill the existing workforce depends less on government interventions, and more on firms themselves accepting their need to progressively evolve to a higher-quality workplace model.

Research has noted the ability of cohesive teams with strong group performance norms to achieve outstanding levels of performance (e.g., Evans & Jarvis, 1980; Tuckman & Jensen, 1977). But before a group can become cohesive, its members need the confidence and abilities of quality interaction and self-confidence that will permit them to cohere. For these kinds of reasons, literacy policy needs to be re-thought in broad ways so that valid outcomes sought from investment may also include a wide range of benefits in the workplace.

Adult literacy is one facet of human capital, complemented by other aspects such as interactional skills, or self-confidence in decision-making and in identi-

fyng workplace improvements. Yet human capital needs to be seen within a context of organisational capital, being the application of human competencies within workplace environments. It is the progressive application and rising sophistication of such abilities at work that spur social and economic benefit.

Therefore literacy policy needs to be tied securely both to broad considerations of human capital at high levels of human performance, and to the development of national organisational capital. This has implications for the current Industry Training Strategy (ITS) which has set targets for acquisition of workplace-oriented qualifications but now, in our view, needs broadening to include overt recognition of various forms of human development in the workplace.

Johnston (2004) states, “there is good evidence for the benefits of literacy (but) ... little evidence for the benefits of literacy training” (p. 24) and, “there are no rigorous quantitative studies of the benefits of literacy training to firms” (p. 22). In this we see ambiguities in respect of “literacy” and training in literacy. The “benefits of literacy” occur at all levels of literacy, and so often stem from proficiency in high-level, sophisticated workplace activities. In contrast, “literacy training” usually means developing skills at quite low levels of performance.

Therefore Johnston’s (2004) observation should be seen in the context of unresolved debates about the importance of different and specialist forms of literacies. These include interactive literacy and critical literacy, and typically feature subtle problem-solving skills of a high cognitive and affective level.

Such literacies do not exist in a vacuum, but operate within actual work settings where people interact in mutual inter-reliance, and demonstrate sophisticated work capabilities. Thus, to be enacted in reality, specialist literacies (human capital) demand a strong basis of social capital (trust, interaction, mutual support) and organisational capital (work skills in actual enterprise settings).

As noted previously, there is a case for the ITS to be broadened to become the Industry Training and Development Strategy, as training alone is too narrow a concept to drive substantive organisational improvement. This is especially so in small to medium size enterprises (SMEs) where the opportunities for formal training as such are normally restricted, but where opportunities for personal development may exist via various in-house and external initiatives.

B7 Pathways to Literacy - Wish to Assist Others



We have found that people take many, varied pathways into literacy learning, and their motivations for such learning and for persistence in it are diverse. Therefore, policy designed to draw people into learning and keep them there must be flexible enough to meet the needs of the whole person, their concerns, and their context.

For example, "literacy programmes for Māori are not only about reading and writing ... they are also about outcomes, which show that people have increased cultural and political knowledge" (*Te Kāwai Ora*, 2001, p. 35). Or, "literacy programmes for Māori will need to provide for multiple pathways in response to this notion of 'diverse Māori realities'" (p. 9).

A competency-based orientation to skills, knowledge, attitudes, and values has better potential to address needs more broadly defined than an approach based on narrower and intrinsically more limited quantitative measurements of functional literacy. This is especially important for individuals who are strongly motivated by their wish to serve their family or community.

We strongly support the current transition in educational policy focus onto competencies rather than skills, competencies being inclusive of all the skills, knowledge, attitudes, and values required for task performance (“task” being broadly defined). This refocusing is a significant step in the necessary direction of taking into consideration the whole individual, and away from the deficit-oriented, functionalist, or skills-based approach implied within the International Adult Literacy Strategy.

A competency approach is especially needed for policy affecting adult literacy at any level. There have been many scholarly criticisms of IALS and its assumption that literacy is an autonomous entity which can be measured at the level of individual competence without reference to real contexts (e.g., Barton & Hamilton, 1998; Barton, Hamilton, & Ivanic, 2000; Gee, Hull, & Lankshear, 1996; Street, 1984). However, IALS served a purpose as a means of bringing to the forefront and providing one way of addressing issues of adult literacy.

We follow Hull and Schultz (2001) in the observation that studies of literacy in individual test settings are not unimportant. Yet over recent times major theoretical advances have been made in conceptualising literacy as necessarily contextualised, and as varied in nature, as being multiple or multi-literacies, in fact. Therefore an approach that tends to focus thinking on functional literacy is ultimately inadequate and will not provide the basis for holistic educational policy. Respondents themselves were rarely if ever focused on or motivated by a concept of functional literacy for its own sake.

Similar observations appeared in *Te Kāwai Ora* (2001), in its description of the Adult Literacy Strategy as “too narrowly defined and of limited vision” (p. 43). It recommended a new and re-thought literacy strategy that “views education and literacy more broadly” (p. 4). Our interviews with those in training show that this breadth is already often present in their attitudes and certainly in their stated needs. Policy now needs to mirror that breadth.

B8 Pathways to Literacy - Need for a Qualification



Human development needs inherent in the globalising, technologically-dependent workplace are complex and demand a highly skilled workforce. In order to achieve this, lifelong learning, as an approach that values wider skills and continual learning (rather than just funding for functional skills to obtain employment) needs to be emphasised and valued in policy.

The United Nations' Decade of Development for Sustainable Development, 2005-2015, (UN Decade of Education, 2005) addresses lifelong learning, a concept of growing interest to New Zealand policymakers. However, clarity on what lifelong learning means is still elusive, with existing definitions trying to set a direction but tending to be fuzzy, such as the United Nations': "the know how and capacity of individuals and organisations to be able to continuously learn is a most precious asset for the future".

The Tertiary Education Advisory Commission (TEAC) stated: "The tertiary education system needs to be designed to respond to the challenge of lifelong learning in a knowledge society, and this may require new ways of organising, delivering and recognising tertiary education and learning" (2000, p. 12). In its

2000 report, learning was seen as including tertiary education and lifelong learning, as well as “the promotion of citizenship and participation in society” (TEAC, 2000, p. 12).

This is quite closely aligned to current ways of seeing “education”, such as “the mission of education ... is to ensure that all students benefit from learning in ways that allow them to participate fully in public, community, and economic life” (New London Group, 2004, p. 9). The TEAC orientation to lifelong learning then appeared to flow through into thinking within the Tertiary Education Commission and the Tertiary Education Strategy (TES).

However we note a disjuncture between this orientation to lifelong learning in the TES, and the approach within the Adult Literacy Strategy (ALS). The latter is oriented to the problematic absence of literacy, being a deficit model, and exists within the constraints of the International Adult Literacy Survey. The ALS seeks to increase functional literacy levels as quickly as possible. This is perfectly reasonable, but sends quite different signals to policy makers and the sector than the TES’s orientation to the positive characteristics of lifelong learning.

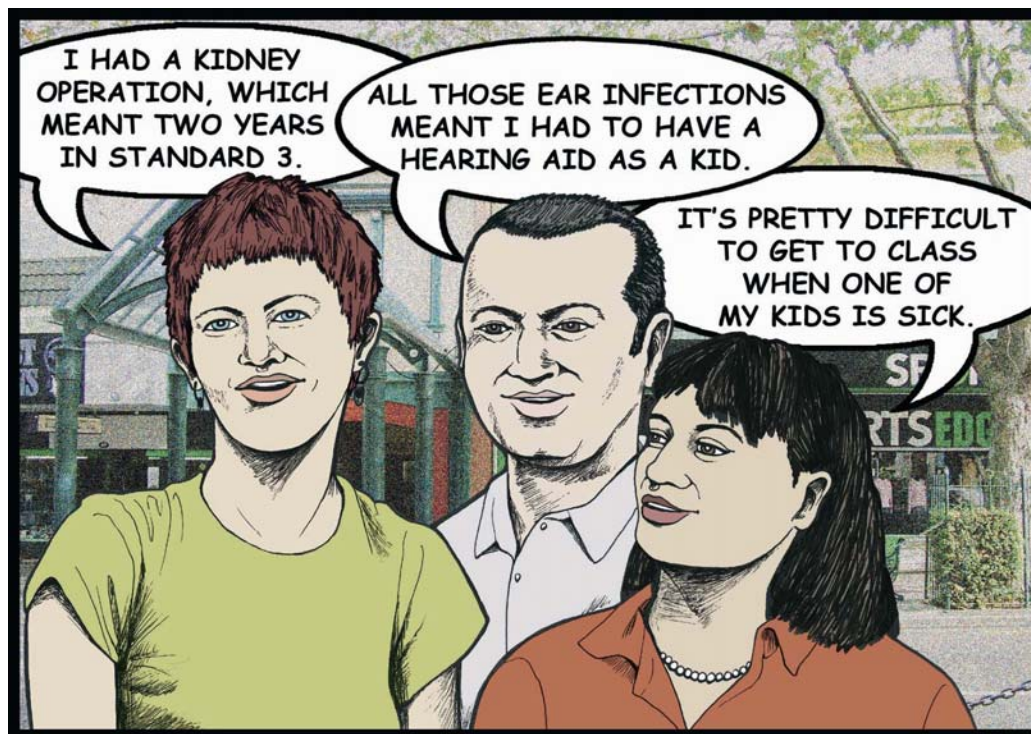
In respect of literacy, then, a key difference between the TES and the ALS is literacy level. As mentioned, the ALS is oriented to IALS, and thus is concerned about manifestations of low literacy. In contrast, the TES points to:

high levels of literacy and numeracy and intensive levels of lifelong education and training, in particular within the existing workforce (and) a comprehensive set of educational pathways to cater for modern lifestyles and employment patterns, informed by vastly better links between employers, unions, and the tertiary education system (Ministry of Education, 2002, p.12).

This latter locates literacy within a holistic view of lifelong learning, rather than focusing on low literacy and its solutions. However, a point of similarity is that both the TES and the ALS indicate that coordination of various affected policies and government agencies is needed to maximise literacy policy success.

Section C. Barriers to Literacy

C1 Barriers to Literacy - Health-related or Physical



In our interviews with people of low functional literacy in English, the most frequently mentioned individual barrier to literacy had to do with health-related or physical problems. Of most significance next was the issue of schooling not meeting people's needs, then, what interviewees saw as either absence of personal goal orientation or an inability to attain a set personal goal.

Many respondents described these three barriers of health, schooling and goals very frequently, indicating these three as the barriers to literacy about which they were most passionate or troubled. Health, schooling and goals were also the three barriers to successful adult literacy mentioned by the largest number of respondents. That is, these three items are more widespread, and of more intense concern, than all other barriers. In a number of cases interviewees indicated that missing school because of illness was a low point in their learning and that their subsequent educational achievement had not recovered from it.

In the UK, Fawcett (2003) found that the persistence of self-reported learning disability was highest for people at IALS level one. Then, statistical analysis of

data from the NZ IALS and national censuses (Culligan, Arnold, Noble, & Sligo, 2004) indicated that learning disability or health impairments prevalent for six months or more had a strong association with low literacy (p. 47).

Many respondents who described health as a literacy barrier also talked about disruption in their lives caused by health problems combined with family dislocation, emotional turmoil of various kinds, and the grinding effects of family deprivation. We believe that messy, intractable problems affecting individuals require sophisticated, multi-faceted, and persisting follow-up solutions.

A useful insight for policy makers from this is that strong interconnections exist among low literacy attainment and health, schooling, personal goals and family environment. This suggests what we take to be a holistic linkage of such issues.

A holistic interpretation of literacy, health, and their concomitants might also evoke traditional perspectives on Māori health. This has more to do than just wellness or lack of it for an individual. Māori health is often depicted as being linked to whānau health and wellbeing more than that of the individual, and as well is interconnected with tinana (physical aspects), hinengaro (a person's mental state), wairua (the spirit), along with te reo Māori (the language), and te ao tūroa (environment) (e.g., Cram, Smith & Johnstone, 2003; Durie, 1998; King & Turia, 2002; Smith, 1999). The *Te Kāwai Ora* report also featured close attention to the role of te reo, recommending that "multiple pathways towards the goal of biliteracy are provided for in te reo Māori and in English" (p. 17).

While a holistic perspective of this nature is undoubtedly correct for Māori, we suggest that a holistic perspective on health and literacy is also appropriate for people of other ethnicities interviewed. The approach taken in *Te Kāwai Ora* (2001) is therefore of general relevance, as indicating a "need for a view of 'waiora', or total well-being, to underpin the (adult literacy) strategy" (p. 44).

In practice this probably means creating both better inter-agency connectedness among the providers of social and educational services, and the provision of single reference-points within communities. The repositioning of the Australian Department of Social Security as 'CentreLink', a node for accessing a wide diversity of services which removed much of the stigma associated with 'dole' offices as catering only to the unemployed, may provide a model which goes at least part way towards offering a clear source of information for everyone, and co-ordinating services such as careers or life planning, training, and employment acquisition or transition.

C2 Barriers to Literacy - Attitude or Motivation



Close links exist among self-esteem, self-belief, self-confidence, self-efficacy, and motivation to learn. Achieving higher standards of literacy does not seem especially relevant to people who have written themselves off as potential learners. But motivation to learn may increase when a person takes stock of their life, often following positive influence from a trusted person such as a family member or respected school teacher. Here too it helps if a person has a target in mind, then has the insight that learning can be an enjoyable experience, and that former feelings of inadequacy around learning can be mitigated.

When an individual returns to learning, motivation to study needs a sufficient space in which to develop. This means that a person's life circumstances have to be such that a series of facilitators are in place. Regular and predictable transport is needed to the learning venue. Fees must be small enough so as not to daunt people on low incomes. A person must have sufficient time in the day free from work or family commitments so that the complex task of learning within and beyond the classroom can occur. Literacy classes should have no waiting lists so that a newly-found resolve to learn is not dashed through lack

of opportunity. If any of these facilitators are missing, a person may be well motivated to learn but lack the ability to complete a course of study.

The Ministry's *Lighting the Way* report (Ministry of Education, 2005a) observes that "Leaving (literacy training) for employment is considered as a positive outcome for vocational programmes here, regardless of the extent of any literacy, numeracy and language skills gained" (p. 11).

In our view, leaving literacy training for employment should no longer necessarily be regarded as positive. When a person gets a job, their attendance at literacy courses and their formal literacy capability-building often ceases. This may be because the challenge of full-time work, often coupled with family requirements, makes allocation of time to classroom learning too difficult.

At this point the individual has entered probably a relatively low-level job, but development of their human capital is predictably uneven at best thereafter. Should an economic downturn occur, the individual is once again at risk of being made redundant. Cessation of learning therefore contributes nothing to individual competency building, development of organisational capital, or to achieving national goals of prosperity and social inclusiveness.

Current funding arrangements for adult literacy mandate a focus "on achieving literacy gains for learners as quickly as possible. We must be working to develop effective programmes and skilled teachers who can maximise learning gains in literacy in the shortest possible time" (Ministry of Education, 2001, p. 6). Wanganui providers would support this but emphasise there is "no quick fix" to problems of adult literacy. Providers described the need for lifelong learning in functional and multiple literacies both before and within employment. This is acknowledged to some extent within the Tertiary Education Strategy (TES) 2002-2007 (Ministry of Education, 2002). However, the nature of the funding and outcome assessments currently in use raise questions about whether lifelong learning approaches are truly being employed.

C3 Barriers to Literacy - Lack of Confidence



Often a constellation of support factors has to be in place before a person has the confidence to move forward with their learning. Numerous support factors may already be present, without anyone having given it much thought, within a prosperous, secure, healthy family environment. But if there are severe limitations on income, security, health, or many other supports that underpin a young person's readiness to learn, then the early steps towards a profession or trade may indeed be too big an ask.

People need specific training in functional literacy in order to move ahead. Yet literacy providers are concerned about lack of funding for functional literacy and numeracy training as standalone subjects, with the current orientation being to fund mainly vocational training with functional literacy incorporated.

One problem arises when a person with levels of literacy sharply lower than the rest of the group enrolls in a vocational training course which is also supposed to address literacy. For the sake of collective progress, the tutor virtually has to extract the person with much lower literacy from the group. But if a person is removed to enable the others to move forward, they feel that they do not

belong anymore, further isolating them from their learning and undermining their confidence to persist.

Our research suggests substantial variability in literacy and numeracy levels among trainees, making for unsatisfactory learning. A provider will not want to hold some students back in the context of vocationally oriented teaching while still trying to teach others, especially in a context where they have the whole class only for one day a week to learn particular skills or units.

In our view the integration of literacy and numeracy into vocational or other such courses makes sense on one level and is supported, overall, but is creating difficulties for some literacy training providers. We see the benefits of integrated literacy and numeracy training, as a logical and appropriate attempt to locate foundation abilities in settings that learners are familiar with or interested in. Yet, providers tell us, funding for functional literacy and numeracy as stand-alone subjects is either harder to come by or has been removed. It is certainly a good idea to embed numeracy and literacy within specified contexts. However, there has to be something to embed, i.e., people still need a solid basis of literacy and numeracy capability.

Most providers support integrated literacy although some are unclear on how they are meant to do it. Essentially they require assistance in the form of guidance from specialist literacy tutors to devise and test programmes. Interviews with participants indicated that hands-on forms of literacy training (numeracy particularly) seemed particularly effective. Yet the uncertainty about the future of specialist funding does not promote effective planning.

Therefore as already noted, we were happy to see the reference in the recent Ministry of Education paper, *Lighting the Way* (Ministry of Education, 2005a) that specific attention to literacy and numeracy competencies may be needed.

The current TEC practice of requiring providers to include functional literacy as a component part of other training courses is appropriate so far as it goes. However this needs to be only one element in a comprehensive package of approaches to increasing workplace literacy and worker success. Importantly, inclusion of basic literacy within other training does not obviate the need for teaching of literacy in a stand-alone manner when the situation requires it.

C4 Barriers to Literacy - Economic Barrier



When severe uncertainties exist about where the next meal is coming from, or how to pay the rent, or the power bill, then getting oneself off to an adult literacy class will not have a high priority.

We believe that an urgent focus for literacy policy must be how to keep children in school. It is especially while at school that children from low-income families can be supported in their literacy attainment. The traditional US insistence on the importance for a child of getting their high school diploma is an appropriate model. Once children have left school it is vastly harder for them to build literacy capability as adults. New Zealand research has demonstrated that a person's level of educational attainment is the "strongest predictor of subsequent adult literacy proficiency" (Culligan, Arnold, Noble, & Sligo, 2004, p. 53). This means that once students have prematurely given up on school, or vice versa, their likelihood of ever achieving a high level of literacy is slender.

However, beyond issues of staying at school, literacy providers may well have among the clearest set of insights in the community into low adult literacy and its concomitants, such as deprivation in a variety of social and economic

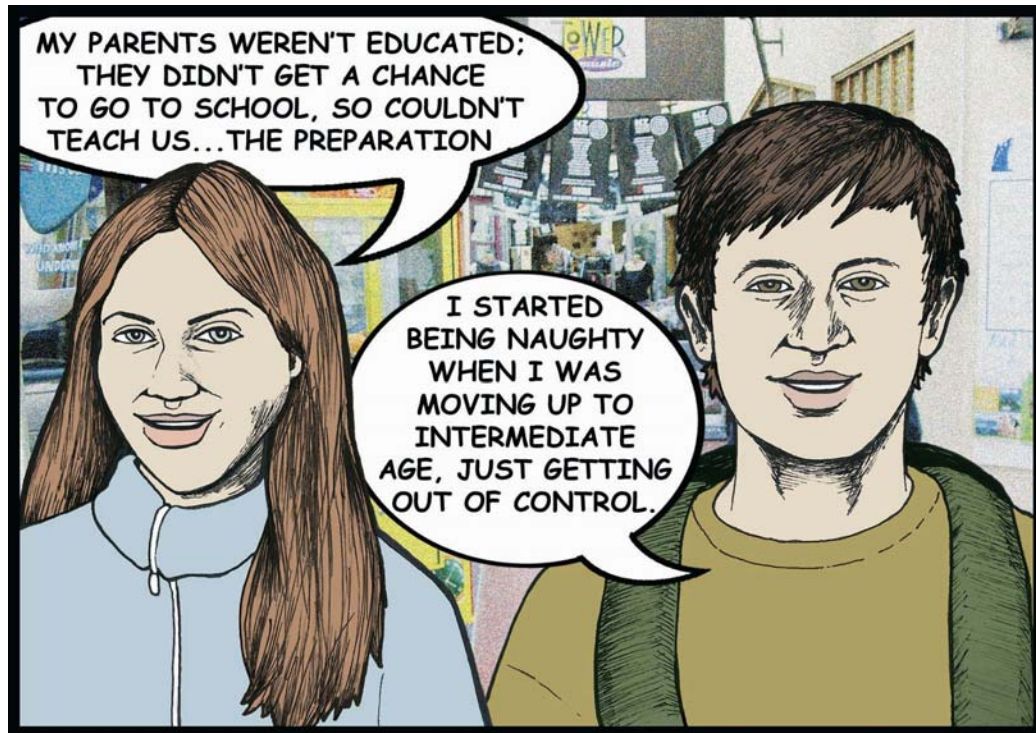
spheres. They are well aware of the uphill battle many people of low income face in a range of areas in their lives, including literacy. Therefore these providers, along with other concerned community agencies, emphasise the view that society needs its citizens to possess basic literacy for reasons of social inclusiveness and justice. We also note that literacy provision geared entirely or mainly to vocational needs likewise offers little to a society that seeks to foster a socially engaged citizenry and a resilient civil society.

Literacy providers whom we interviewed described various impediments to their success. These included: insufficient provision for multicultural needs, the absence of standard assessment tools, more time needed with trainees to meet individual needs, professional marketing and promotion, and changes needed to how literacy is understood in respect of the impact of new technology at work and home.

Providers also sought better-quality funding and pay scales for tutors, and more thorough research into literacy. The importance of realistic pay scales for tutors was emphasised on several occasions. While providers endorsed the need for qualified tutors, they stressed the difficulty of finding and maintaining quality staff given they lacked the ability to reward qualifications and experience through an appropriate pay scale. Some practitioners volunteered the view that monetary incentives to work within community-based adult literacy provision were non-existent.

Of course comprehensive provision for people of low functional literacy does not come cheap. Though, as Johnston (2004, p. 46) observes, “modest investments produce modest gains”. And if there is genuinely consistent and coherent national policy affecting literacy, along with excellent liaison among national and local stakeholders, then why should New Zealand once again not be an international model for excellence in social policy?

C5 Barriers to Literacy - Family Environment



As noted in our earlier *Barriers* report (Sligo, Comrie, Olsson, Culligan, & Tilley, 2005) adult literacy policy needs to take into account all three of the dimensions: A, foundation literacy or functional competency; B, the whole person, along with their needs, aspirations, and abilities; and C, the person's lifeworld in all its complexity and diversity. Intractable barriers to adult literacy may occur in any or all of these three dimensions. Therefore in our view implementation of literacy policy needs to address all three areas simultaneously.

We found that providers of literacy services are broadly in agreement with this model, or else have some other holistic perspective on literacy learning. Hence they usually already do their best to incorporate in their teaching practice all these dimensions. Yet, so long as adult literacy policy and funding are not required to address the needs of the whole person, positive outcomes are likely to be haphazard and uncertain.

Urgent and continuing efforts are needed to engage people at the lowest levels of functional literacy in on-going training and development. Research both from the OECD (2000) and New Zealand (Culligan, Arnold, Noble, & Sligo, 2004) has demonstrated that participation in adult literacy training increases as

literacy proficiency increases, while those at the lowest levels participate least in adult training. This suggests a kind of “Matthew effect” (Sligo, 1997) whereby “to those that hath, it shall be given; from those that hath not, it shall be taken away.”

Patterns of social and economic disadvantage are highly varied, and remedial literacy action needs to take that diversity into account, on a case by case basis. Policy whose success is measured entirely or mainly on getting people into work, thus does not necessarily achieve personal, organisational, or national needs. This is especially the case given that much initial employment is “flexible” or short term. We believe that training schemes which both cover the transition to the workplace and provide follow-up of some top-up training are important for clients and employers.

Specifically, one provider suggested a post-placement support programme of a year’s duration, and to be implemented by one provider only. Previous programmes have been split in some instances across three providers, with one provider responsible for general support of the individual, another responsible for mentoring, and yet another responsible for on-job training. This fragments and undermines post-placement support.

A provider reported that past clients have returned to them for on-job training support as they know the individual and how best they learn, only to have to refer the client on as they were not funded for this purpose.

Further characteristics of improved transition training include being funded for post-placement support including in-job training and unit-standards provision, along with other employer-valued skills such as time management and punctuality. Often, this training would need to be held within work time.

Again, this points to the need for consideration of new ways to provide workplace training, and better co-ordination of services at the point of interface with individual learners.

C6 Barriers to Literacy - Lack of Transport; Isolation



Multiple forms of disadvantage were often evident in our research, with problems such as poverty, transport difficulties, and a family propensity or need to shift locations, coming into a complex, compounding relationship, thus limiting achievement such as literacy. As earlier noted, privilege seems unitary and simple in comparison to disadvantage, which presents as pluralistic, "wicked," and intractable.

Achievements such as sporting success are potentially of great transformational importance in a young person's life. As such, they may comprise a promising conduit into a new personal (and possibly family) frame of reference. With their first taste of success, a young person at risk might for the first time ever, recognise the desirability and relevance of upgrading their literacy among other aptitudes. Yet socio-economic forms of disadvantage combine to undermine any success such as in sports. A young person who feels cheated out of some opportunity might or might not be able to rise above such a challenge in the short to medium term.

Our Wanganui-based stakeholders in this research have remarked that policy often seems designed for the cities and larger towns, and does not sufficiently take into account the needs of people in small towns and rural New Zealand. In discussions about knowledge of funding opportunities available, adult literacy providers mentioned funding available through Industry Training Organisations (ITOs) for workplace literacy programmes. However, this funding was not generally available within Wanganui because of its provincial location. An employers' representative noted that it is very hard to encourage ITOs to come out to the provinces. Better flexibility in response to individual circumstances is sought to ensure that geographical location is not a determinant of social or economic achievement.

More than this, "many of the policy failures of the last half-century can be attributed in large part to the limited vision of those who have proposed that changing one part of the social-economic structure will fix multiple ailments" (Svendsen & Svendsen, 2004, p. xiv). The UK Labour Government's attempts to produce "joined-up solutions" (e.g., Department for Communities, 2004) has its counterpart in the efforts by government entities in this country to produce inter-agency solutions to intractable social and economic problems. Yet more active collaboration is needed, both at national and provincial level.

However, we believe that Wanganui has some justifiable claim to being a model for such collaboration at provincial level. We observe nevertheless that local collaboration exists there essentially from a local awareness that this is a sensible and appropriate thing to do, rather than flowing from any national initiative or mandating. We recommend that similar collaboration in other, less obviously cooperative regions, should be rewarded and encouraged from Wellington.

C7 Barriers to Literacy - Goal Orientation



Figure 1 (originally in Sligo, Comrie, Olsson, Culligan, & Tilley, 2005) shows barriers to literacy broadly categorised into economic and social factors on the one hand, and directional intervention factors on the other.

The horizontal axis indicates socio-economic factors such as few resources in the home, isolation, or economic related work pressures. The vertical axis has directional interventions, such as a teacher's encouragement, goal planning, and active family support for a person's aspirations. Laterally, a variety of barriers constitute impediments but ultimately a sense of purpose associated with a professional or life goal indicates ways to overcome such barriers.

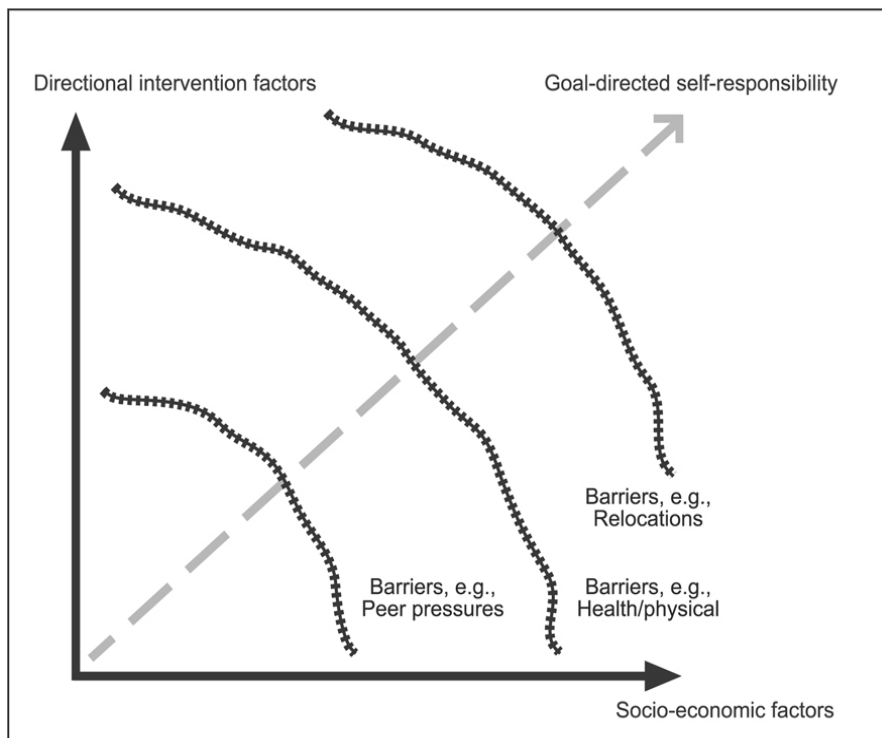


Figure 1. Barriers and personal development plans

A low score on both axes signals deprivation, low self-image, motivation and confidence. Along with this is a lesser goal-directed self-responsibility for learning. If socio-economic barriers reduce, and a stronger sense of purpose is instilled, improvements in self-responsibility in learning may result.

Yet factors on **both** axes need to strengthen for improved learning to occur. Individuals themselves need to see the point of a personal goal. Yet even if a person has been inspired by someone who has shown them a pathway to their aspirations, little progress is likely if the resources are not there to pay the bills.

Along the way an individual's learning has to break through other barriers, the mix of which will be unique to each person. These barriers may include peer pressure (negative social capital), health difficulties, frequent family relocation, and the like. But when the individual experiences capacity-building on each of the two axes (i.e., directional intervention resulting in strong goal orientation, and improved socio-economic capacity) higher motivation should follow.

C8 Barriers to Literacy - Problems at School



This category of difficulties at school includes problems with learning styles, where respondents often stated that they found it difficult to relate to forms of teaching, such as ways in which material was presented in the classroom. Although this research did not formally set out to explore differing ways of learning, respondents generally wanted to talk about such issues. Many found themselves unable to access academic ways of knowing, and would often comment on how they learned best via activities of some kind. Schools might observe that they are not well resourced to meet a variety of students' differing learning styles in the one classroom.

Our interviewees went on to comment on feelings of dysfunction and alienation that they encountered once they had determined that school was not meeting their needs. Learning difficulties typically resulted in behavioural and attitudinal problems and early exit from the school system.

The employers whom we interviewed were all of the opinion that literacy problems are embedded deeply in the educational system. Small employers in particular called for schools to take a more directive approach in preparing stu-

dents for work, which would include more on the three Rs. A lack of alignment was also stated among schools, tertiary education, and workplace needs. Linked to this view was the claim that the education system has done a disservice to young people by pushing them towards university rather than preparing them for trades or other forms of work that might better suit their abilities.

This supports the view in the Workplace Productivity Working Group's report (2004) that:

Many employers are dissatisfied with current education and training systems ... there is widespread concern about the progression from school and work. Many employers are worried about the lack of 'work readiness' in the youth market. They believe basic skills of numeracy, literacy and communication all need to be improved (p. 23).

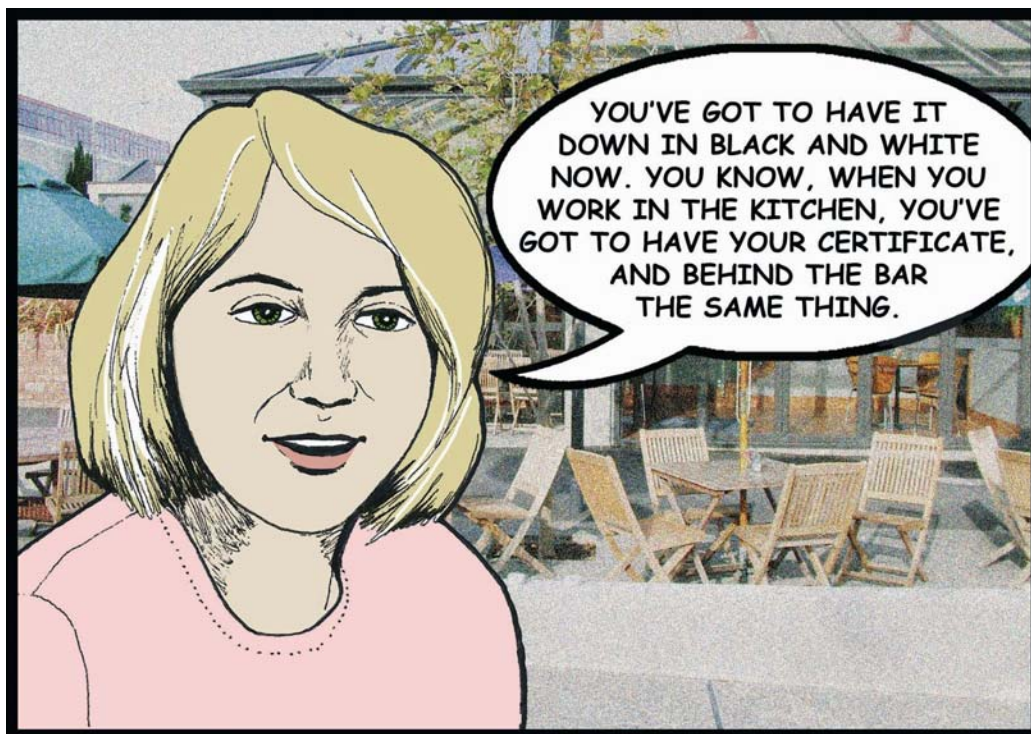
It was interesting that our Wanganui employers tended to equate literacy and communication competency, with remarks like "if you can't communicate, and I think literacy is a form of communication, you're at a distinct disadvantage." They generally accepted they needed to supply workplace training. Yet they were adamant it was not their role to train in literacy, being of the view that the school system should provide both communication and life skills.

Often educationalists have been at pains to contradict any such employers' notions that schools exist just to prepare students for work. But it would be unwise to discount the level of frustration among employers who are shocked by what they believe to be the poor literacy and work-preparedness of many job seekers. We believe this shows a need to strengthen existing transitional school to work programmes, so that academic literacy can be transformed into workplace literacies.

Our research also pointed to a need for better-funded schools with smaller classes, more (and a wider range of) teaching resources, and greater attention to pastoral care so that students with different needs were identified and supported, rather than labelled 'difficult'. The number of respondents who had felt negatively labelled during their schooling was alarmingly high, and they frequently identified this as contributing long-term to their life outcomes beyond school.

Section D. Barriers to Employment

D1 Barriers to Employment - Need for Formal Qualifications



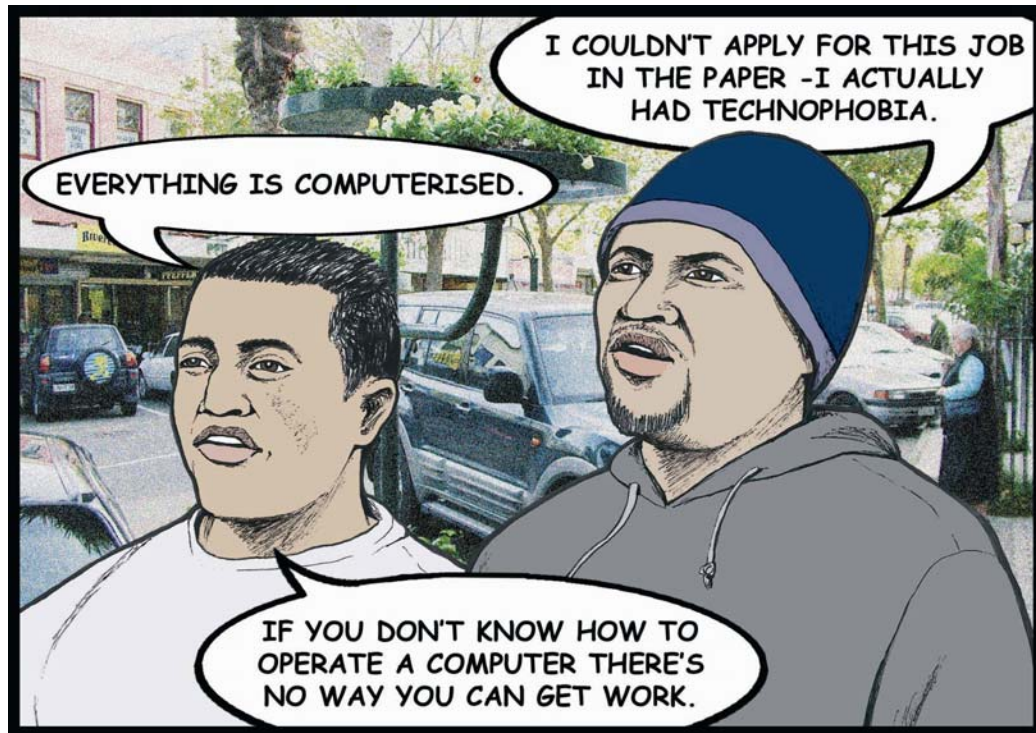
If qualifications are not obtained at school, then for individual, organisational and national reasons, they need to be obtained later, often via adult training providers. But as already noted, the provision of such training is fragile and much in need of development. Particularly needed are the following points made by Wanganui literacy providers, in order to transform the field of adult literacy provision, which we include here more or less verbatim, since they provide a clear overview of current problems and issues:

- Obtaining sustainable long-term funding is a major issue. Clear, accessible information is lacking about the range of available funding or applicable criteria. A clearing-house of information about funding sources and resources is needed, rather than each provider having to seek out and interpret their own information.
- Funding regimes should take into account all the associated costs, especially of working one-to-one with students when needed, of working with

small groups, of professional development, and developing and purchasing resources.

- It is a challenge trying to meet the full literacy needs of students within what is often an unrealistic funding regime. Gaps exist between what funders identify as outcomes and what resourcing will provide. Often restrictions in terms of funding determine the duration and depth of training.
- Providers agreed on the need to market PTEs as a group as well as individually, given low community awareness about who the providers are and what they do.
- Some providers spoke of Australian models experienced (in Victoria and NSW), where there is greater involvement by the employers, and employers contribute to the cost of programmes. Australia appears to have more continuity between learning on the programme/ course and learning on the job.
- Providers commented that the Literacy and Employment research project had raised the profile of several agencies, and had also provided the basis for professional development. They saw potential for more action research to build on this. The L&E project has also helped develop collaborative approaches, although this was seen as “competitive collaboration”.
- Providers agree that while functional literacy and numeracy are key issues, the focus has to be on the whole person. Learners have to deal with a raft of personal challenges, including self-image, motivation, health, and work habits. The local initiative of having a social worker collaborate with one provider was proving a success.
- The various stakeholders (e.g., providers, ITOs, TEC, DOL) need to work together to optimise positive links between programme learning and on the job learning.
- Employers are reluctant to release employees to attend courses, in line with the small size of businesses locally. They cannot afford to lose time and productivity.
- Potential learners with literacy and numeracy problems could be considered more unlikely to undertake correspondence and other distance education options.

D2 Barriers to Employment - Need for Technological Skills



Recent commentary (e.g., the Workplace Productivity Working Group report, 2004) has noted that in New Zealand, labour utilisation (LU) is high by OECD standards, but labour productivity (LP) is relatively low. Our high LU rate suggests a national culture quite oriented to work, and a relative lack of people interested in avoiding work. This is reinforced by Growth & Innovation Advisory Board research (2004) which points to indicators that New Zealanders possess "a strong theme of ambition" and "large numbers of respondents claim they make considerable personal effort to improve their life" (p. 10).

Some may account for our low LP rate via the argument that our quite sudden improvement in employment statistics has meant that formerly unemployed people with little recent work experience have now re-entered the workplace and are re-adjusting to it. Therefore it is not realistic to expect significant short-term productivity improvements on their part.

Yet this can be only a partial explanation of inadequate productivity. Beyond this, our relatively unsuccessful LP rate indicates a capability deficit at work. We surmise this includes those at work who lack competencies or opportunities

in the workplace to create innovative change and improvements. And if indeed as already noted over a quarter of managers are at the lowest IALS levels, and around two-thirds are at a poor or middling level of competency, then there is likely to be a leadership and managerial capability deficit of some magnitude as well.

This situation is probably exacerbated by what might be called capital shallowness, being “a lower capital-to-labour ratio than many other countries” (Workplace Productivity Working Group, 2004, p. 30) given that “the more physical capital available to each worker the more each worker can produce” (p. 33). But a higher level of capital investment alone is no silver bullet for low productivity problems. Smarter technology demands smarter and more skilled people to create multiplier effects and leverage value from technology’s potentialities. As more advanced technology permeates the levels of a firm, competency-building must likewise accompany it. Hence advanced literacy abilities are once again implied, with embedded multi-level training programmes a possible solution.

Recent government/ private sector initiatives to provide resources for businesses, such as the on-line Workplace Productivity Agenda (Workplace productivity, n.d.) or Project Collaboration (Ministry of Economic Development, n.d.) are potentially of great value to some. Good quality diagnostic tools are appearing on the sites identified here. But they will come into their own only when managers have accepted a culture of continuous improvement, when they want to use such tools, and when they have the competencies, especially literacy, to research new ideas in structured, logical ways.

D3 Barriers to Employment - Health or Physical Barrier



The magnitude of health and physical problems as impeding literacy learning indicates the urgency of addressing ways to ensure that people with current (or major previous) health problems are helped to catch up. Better identification and support systems are needed for people with problems of poor eyesight, hearing loss, ADHD, dyslexia, and related conditions which have undermined their ability to participate in classroom activities. Specific support to catch up on literacy attainment is the next required step.

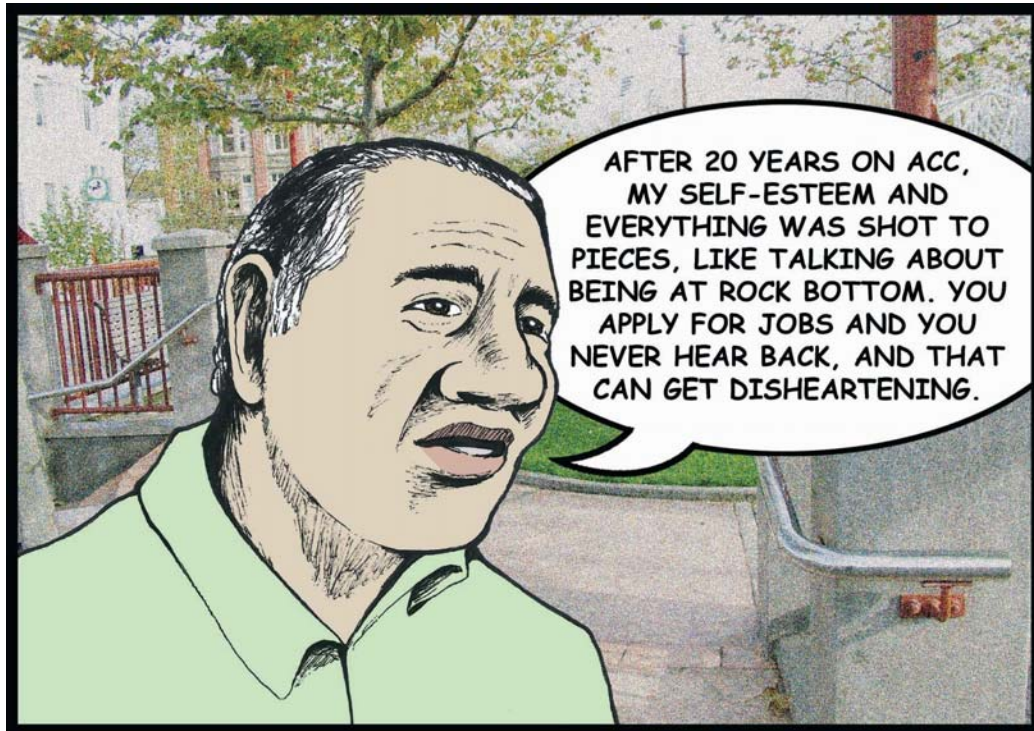
Further health issues and the concomitant factors of personal goals and family environment are evident as barriers to participation in learning in adulthood and/or employment opportunities. In discussions surrounding the policy implications of the research to date, providers of adult literacy services noted the importance of being funded for and therefore able to address drug and alcohol issues in their programmes. These were addressed currently through peer influence (from those participants who had 'been there before') and via appropriate role modelling.

This has been noted before, such as in the *Te Kāwai Ora* Report (2001):

Of increasing concern among literacy tutors is the need for specialist training for those who work with people presenting with multiple health and welfare needs. The needs of those who are recovering from mental health disorders, suffering from addictions and those in recovery programmes are adding major challenges to an already demanding field (p. 49).

Within the realm of personal goals, self-esteem, and self-confidence (all qualities important to achieve before learning can even begin), appropriate, credible role models and mentors were seen as essential. These mentors were even mentioned as a possible intervention to be implemented within secondary school. This would be one attempt to try to stop the cycle of non-learning brought about by alcohol, drug and peer pressure problems, thus to stop adult literacy services from being the “ambulance at the bottom of the cliff” (Sligo, Culligan, Comrie, & Vaccarino, 2006).

D4 Barriers to Employment - Lack of Confidence



Workplace competencies are more than just skill-sets. Especially in a context of very low unemployment, often a business has to do what it can for a person with dramatically lowered self-esteem and lack of self-confidence that impede their ability to make a contribution. However, managers may have little training to equip them to assist such individuals.

Of concern is the absence of support systems for people in literacy learning once they enter employment. Even though some funding for this purpose is available from the Tertiary Education Commission, small employers in particular are unable to cope with the compliance costs inherent in finding out about opportunities, then applying for such funding. Post-placement support programmes require a long time period and cannot be adequately implemented within the short time frame currently endorsed under TEC funding. Once again client-centred systems within government agencies are needed to make it very straightforward for small businesses to access information and funding.

There also may be a role in this regard for ITOs to collaborate with employer organisations, but there are problems of scale in more remote regions. In addi-

tion, there is a lack of awareness of these sources of potential collaboration as well as a practical barrier of attracting ITOs out to provincial centres like Wanganui, let alone rural businesses. Collaborative activities among ITOs may be part of the solution.

At national level the Tertiary Education Strategy acknowledges that lifelong learning is complex, requiring a multi-disciplinary strategy involving a variety of government departments. Similarly, at the local level, adult literacy providers in Wanganui recognise co-operation and coordination are important and could lead to improved outcomes for clients and providers alike.

Yet systemic difficulties occur in small and isolated providers being able to share resources, staff, and expertise with others. Most prominent among the factors impeding more systematic advances in collaboration is competitiveness among literacy providers, driven by the Government's funding regime. As noted in research into Australian social service provision (McDonald, 2002) competition among small providers for funds promotes secrecy, and results in failure to build upon local successes and erosion of community service obligations. New Zealand's adult literacy funding regime needs reform to ensure that it promotes collaboration among providers, not competition. The literacy provision system is simply too fragile, ill-resourced, and urgently in need of sharing of best practices, to justify a competitive arrangement.

Systems of contracting literacy services may further make funders ignore outcomes in favour of a checklist approach to accountability. They may also play down performance improvement in favour of compliance (Schick, 1998). The short term nature of funding does not acknowledge the reality of the long lead time inherent in development of proper client training, staff training, and building up of pedagogical resources.

D5 Barriers to Employment - Jobseekers' Attitudes



In a fraught and contested site such as adult literacy and employment, feelings tend to run high. Old puritan, blaming attitudes from the past may not be far beneath the surface. Undoubtedly there is a frustration in the community with people who are not perceived as pulling their weight.

Often the media's handling of sensitive social problems has been at fault. We are probably all familiar with simplistic versions of reality, using the language of moral panic, which turn up in tabloid journalism. Emotive accounts of social dysfunction may be more part of the problem than the solution, and cheap shots in the news media do nothing to acquaint people with the complexity of endemic under-privilege associated with low functional literacy.

That said, it is also true that a small minority of people do decide not to fully enter or re-enter the workforce. Yet, as noted already, this country's high labour utilisation rate illustrates that this group is a relatively small one.

Adult literacy providers always note the complexity inherent in helping people re-enter the workforce. While unit standard achievements and TEC employ-

ment outcome measurements are useful, they are not the full picture. One provider stated that “the statistics are not showing what is really happening”. Providers spoke of increased trust, self-confidence and self-esteem that occur when learners start to succeed. Some identified cessation of drug and alcohol abuse and removal of other barriers to participation. Any of these may need to be addressed before an individual becomes engaged and learning can begin.

Increases in confidence, self-esteem, trust, and cessation of drug and alcohol abuse can be critical steps in an individual’s learning. However, it is difficult to communicate these outcomes (without which learning does not occur) to government departments in statistical form. Nor are they weighted as equal to tangible outcomes of gaining unit standards or achieving employment.

Providers were concerned about the inability to measure ‘soft’ wellbeing outcomes as a reflection of their work and an individual’s progress. Some initial work has been done in the UK in measuring soft outcomes (Cookson, forthcoming). This aims to present such outcomes in ways suitable for reporting to funders, and to use with individual learners to show their progress.

Fortunately, there is a developing re-orientation of national educational policy to the broader field of competencies (skills, knowledge, values, and attitudes) and away from just the limited area of skills (Ministry of Education, 2005b). This has good prospects for building a more comprehensive perspective on adult literacy, given that values and attitudes in particular are intimately linked to the circumstances of the individual and their life. As soon as an educator accepts responsibility for addressing learners’ knowledge, attitudes, and values, more is demanded of them than if skills alone are the focus. However, this approach needs to be supported with adequate funding and resourcing.

D6 Barriers to Employment - Need for "3 Rs" Literacy



While employers are generally happy to provide job-specific training, they do not believe it is their role to teach functional literacy. One contradiction is that employers are not generally supportive of broader "literacy" programmes that might include a number of communication abilities and the wider benefits of life skills, even though they say they seek these in employees. Quality evidence that employers find credible, about correlations among advances in competencies and beneficial outcomes for the firm, is needed.

The policy and funding focus on functional literacy and employment training appears to hinder endeavours to provide the environment needed for lifelong learning and thus, a knowledge society. A large number of adult literacy trainees are sent on courses as a condition of continuing to receive government welfare income. This aspect of compulsion results in many no-shows, drop-outs, and a motivation challenge for providers, challenges that are often successfully met by addressing the learner holistically.

However, current policies and funding offer little incentive for trainers to address whole person development or for students to continue further learning

once they have got a job. The challenge for government is to move beyond the rhetoric to institute practices that will encourage lifelong learning. Some New Zealand research exists (e.g., Benseman, 2005a; Benseman, 2005b; Culligan, Comrie, Vaccarino, & Sligo, in press), but more is needed in order to explore its implications for both community and enterprises.

Our surveys of literacy providers also raised concerns about the impact of funding systems on effective teaching and learning. Literacy tutors strongly voiced the view that funding levels were inadequate, reflecting their recognition of the importance of additional holistic development support for students, in the form of more money for resources, programmes, and staff development.

One adult literacy provider reflected on the potential for professional development within the sector and noted the following:

Professional development should link organisational and individual needs with funding allocated equitably amongst providers. Targeted funding would usefully include allocations to develop and run professional practice groups both in-house (within providers), and within local cluster groups. Research funding needs to respect the knowledge of communities and promote approaches that facilitate participatory action and mobilise community research capacity. Funding mechanisms should ensure that community engagement in research is a valid professional development tool, that engagement is acknowledged and valued. Funding for the development stages of community research projects is essential if projects are to be purposeful. Collaborative arrangements between academic and community researchers must be carefully constructed.

D7 Barriers to Employment - Lack of Work Experience



Government innovations such as transition from school to work schemes and work experience schemes, are all steps in the right direction. Likewise the Modern Apprenticeships programme is clearly serving a useful purpose in supporting young people to develop the broad capabilities of work readiness.

In our view the Adult Literacy Strategy (ALS) has also served a useful purpose in getting a variety of stakeholders to address issues of adult literacy and to point a direction forward. However, we believe that its relatively narrow alignment to the problems of low literacy is now outmoded. It should be replaced with a Lifelong Learning Strategy, which may include foundation learning at its base, but beyond this be oriented to both the needs of nation-building and the formation of human and organisational capital.

In association with reform of the ITS and the ALS, we need to re-think the role and function of ITOs. The ITOs have often not worked well for small business or in the provinces. For one thing, "training" alone is reductionist and simply unavailable or unaffordable in direct or opportunity costs for many small businesses. Instead, the formation of more sophisticated organisational capital

must be encouraged by policy initiatives that go beyond training alone and promote organisational development.

The Workforce Productivity Working Group stated that it is necessary to “ensure that ITOs are involved in workplace-based training for foundation skills and training for SMEs” (2004, p. 16). Yet historically ITOs have declined to become involved in foundation skills training. They question whether this is really their primary role; they are well aware that achieving gains in adult literacy training is difficult, time-consuming, and costly; and they know that the adult literacy training field lacks direction, is fragmented, and poorly resourced. Even if an ITO sees the need for better adult literacy in its industry, the high costs and dubious outcomes from such engagement tend to prevent or limit its involvement.

We believe that a redefinition of the outcomes sought for the ITOs, including broadening their vision beyond training outcomes alone, accompanied by better resourcing, will be necessary before they can be expected to include foundation skills training at the base of their pyramid of activities.

The WPWG goes on to note that consideration is needed of “the role that ITOs can play as a delivery agency and how this can be encouraged (and identify other appropriate organisations where no ITO exists)” (2004, p. 17). To this, we would add that it is necessary to look for ways to break down the silo mentality within the ITOs that is encouraged by their current role, to provide incentives for them to engage in joint activities where appropriate, to strengthen their connections where necessary to Modern Apprenticeships, and generally to promote their transition to Industry Training and Development Organisations.

D8 Barriers to Employment - Family Commitments



Barriers to literacy and barriers to employment are often quite similar. Family commitments that impede an individual's ability to undertake personal or professional opportunities constitute barriers to either or both of literacy and the workplace, and were identified by many respondents. Interviewees pointed to the need for better childcare support and a more flexible working environment, which come together to create family-friendly workplaces. A family-friendly workplace may be more important to a job-seeker than a high rate of pay or other economic benefits.

However, usually large organisations will find it much easier to provide benefits such as a crèche than small employers, and so this again represents a challenge for New Zealand's numerous medium and micro enterprises. In recent times the government has taken action to provide more support for childcare, especially for lower-income families, but difficulties in affording childcare are probably a significant constraint still for caregivers who want to re-enter the workforce.

In respect of support for childcare, New Zealand appears to have significantly less adequate provision than Australia, our nearest (though far from only) significant competitor for skilled personnel. Pressures associated with being a family caregiver often seem to have a compounding effect on other barriers to both employment and literacy.

For example, as the costs associated with raising a family increase, the perceived difficulties associated with undertaking or paying back a student loan become greater in magnitude. That is, when a person is faced with long-term demands of a family, their commitment to their own professional development is likely to diminish in favour of their family's needs.

Where to from here?

We have already suggested that application of technology without attention to the human and organisational dimensions is unlikely to do much for productivity. And similarly, our Wanganui research to date suggests that enhancing human capital (e.g., literacy or other skill building) alone is not enough to create high value employment. We believe that all three forms of capital (human, social, and organisational) are needed for people to genuinely perform as competent life-long learners and for enterprises to create high value jobs. It is important to discover valid evidence of what actual literacy and literacies competencies are demanded when a firm steps up to a new level of performance, such as seeking to engage in global enterprise. To date we have not been able to discover good research of this nature.

This, then, is the connection point urgently needing elucidation among multiple forms of literacy and social and organisational capital, linking the structure and strength of a community's social capital to participation in quality employment. Further research is needed to explore how quality employment and productivity enhancements rely on the interpersonal networks, mutual obligations, and manifestations of trust that comprise a community's social capital, as well as on the embedded, work-based competencies of organisational capital.

A persisting workforce skills shortage (of which low workforce literacy is a key element) has been identified. Various agencies (e.g., Labour, Education, and TEC) have called for research to support capability development in workforce upskilling. Yet there is a limited New Zealand knowledge base.

Substantial government investment exists in building adult literacy with the aim of increasing work placements. However, as noted, our Wanganui research has shown that once literacy learners find employment, their participation in learning often ceases, potentially closing off avenues to higher-quality work. This is not a satisfactory social, employment, or personal outcome, and does not advance the national goal to build a knowledge economy employing a skilled, literate population.

Government initiatives such as upskilling the existing workforce are at risk of being too limited if their focus is mainly just on skills. To be helpful in building individual and workplace capability, what might have formerly been thought of as skills need to be conceptualised more broadly as competencies. The latter term is now generally regarded as inclusive of key knowledge, values, atti-

tudes, and skills that enable a person to perform well in given tasks (Ministry of Education, 2005b) while skills are more narrowly defined.

Benefits in human development in the workplace include creation of both human capital and organisational capital. Any broader conceptualisation of valid outcomes of this nature will of course take time to develop and negotiate, probably on a case-by-case basis. Yet the often-demonstrated association between building adult literacy and other forms of human and organisational capital development deserves explicit recognition in policy.

Te Kāwai Ora (2001) stated that “literacy is too critical an issue for patch protection to obscure the issues and delay intervention” (p. 43). Nevertheless, many government and community agencies understand the need for “joined-up” and less sectorial inter-agency policy, given that many personal and social development needs are intertwined. They do seek ways to create the conditions that will generate quality employment. Yet strong, effective ways of doing so have not yet been devised, and what is proposed here is beyond any individual agency’s research capability, demonstrating the importance of jointly-sponsored research and action.

Progress is needed to identify and depict interdependencies among these three forms of capital. This has the prospect of articulating then mobilising value creation approaches for individuals and the enterprises that employ them. An outcome should be recommendations for a range of inter-agency policy initiatives to permit participation in quality employment.

The Literacy and Employment research programme has enjoyed from the outset very strong interest, support, and involvement in Wanganui and Districts from government departments, local authorities, literacy providers, Iwi, employers, and statutory agencies. As noted, new research projects associated with this programme have now spun off into the Rangitikei, the Manawatu, Wellington (two projects), and Rotorua. For these reasons Wanganui should be developed further as a test site for ongoing literacy-based research.

Such community collaboration is a valuable asset for research designed to cross agency boundaries and demonstrate interconnected, inter-agency solutions in employment and social inclusion. Agencies are aware of the complexity of the literacy/ social capital/ organisational capital nexus. They seek excellent research, well grounded in supportive community contexts, which will create new ways of thinking about policy, funding, and fostering quality employment.

In our view this is the way in which research into literacy and employment should evolve. The Ministry of Education's recent discussion document on competencies (Ministry of Education, 2005b) observes that "competencies should be taught and assessed in meaningful contexts with proficiency inferred from performance in those contexts" (p. 14). The same applies to building capability in adult literacy at whatever level. We have argued that literacy and numeracy may under some circumstances need focused, stand-alone training. Yet it is not sufficient to see literacy as an autonomous element in its own right, to be measured in isolation from other things.

Rather, successful literacy is to be inferred within a context of a whole person living within a social framework, who is performing activities within a community or work context. Making accurate inferences about learners' current ability and needs for development, calls for a high quality profession of adult educators as described above.

There is also evidence that funding systems for improved foundation abilities are not really serving to lift economic performance or productivity in optimum ways. Our research suggests a tendency for employers to tacitly accept that a low-skills, low-wage economy is our national reality and a framework within which they must work. An informal social acceptance of New Zealand as an economy of this nature will require intervention on a series of levels if it is to change.

A high-value, high-wage economy does not of course depend on literacy alone. However, given the demonstrated correlation between literacy and income (Johnston, 2004; *Literacy skills for the knowledge society*, n.d.) a person who enjoys high literacy is also likely to have more economic and social options than a person of low literacy in English. The same person is likely to be more self-confident and, as an informed generalisation, is more likely to set themselves relatively more demanding life targets.

Nationally, there seems to be a gap between what we hope for and what we are actually creating. What we hope for is to build fundamental competencies as a way to get people started on a life-long staircase to learning and practising more sophisticated professional aptitudes. What we are getting is funding and delivery practice that emphasises (mainly low-level) employment outcomes for those with limited education, the provision of which tends to cease when a person actually achieves any job.

As Johnston (2004) points out, “adult literacy training ... is a developing field, and governments in a number of countries are considering a major expansion of provision” (p. 36). If the ante is being raised worldwide and our major trading partners and competitors are serious about upgrading workplace literacy generally, New Zealand has few options other than to do likewise. In so doing, though, we believe that an important challenge is to avoid the trap of “more of the same” adult literacy training, by stepping up to the next stage of lifelong learning that works both at community and organisational levels.

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In this report, we have followed the structure of the issues that adult literacy training participants themselves told us were most important to them, to create a series of 32 “Tipping points” that represent the crux of literacy issues for adult literacy learners. These points represent the needs, pathways, and barriers to literacy and employment that interviewees told us had changed or were changing their lives.

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