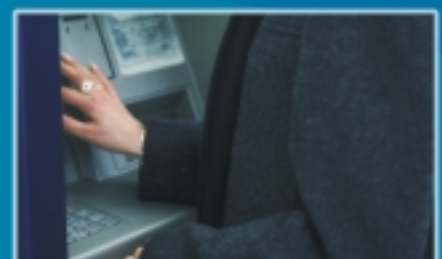




In Their Own Words:

POLICY IMPLICATIONS FROM THE
WANGANUI ADULT LITERACY AND
EMPLOYMENT RESEARCH PROGRAMME

Frank Sligo ♦ Niki Culligan ♦ Margie
Comrie ♦ Elspeth Tilley ♦ Franco
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Massey University

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This report is dedicated to the memory of the late
Dr Su Olsson (1942–2005), friend, colleague, and objective leader in the
Literacy and Employment Programme.

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1. Introduction

Internationally there is not a large amount of high-quality research into adult literacy, and in New Zealand (while some research has been completed by researchers, practitioners, and the Ministry of Education), there have been no longitudinal studies of what makes for success in literacy teaching and learning. In particular, as noted in a major report on Māori adult literacy, *Te Kāwai Ora* (2001), “there is a dearth of research available in the field of adult literacy for informing the development of effective policy” (p. 22).

The FRST-funded, longitudinal Wanganui Literacy and Employment (L&E) research programme is therefore significant internationally in its attempt to take a comprehensive, multi-method, multi-theoretical approach to researching this topic. Substantial triangulation of research findings is now becoming possible because of the large number of methodologies and projects (22) underway there, along with several associated spin-off studies being conducted in the Rangitikei, the Manawatu, Wellington (two projects), and Rotorua, each of which is 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 fruitful 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.

In this report we consider implications for national policy and practice pertaining to adult literacy arising from this research programme. A novel feature is that as its basis we have chosen to foreground a series of actual quotations derived from our interviews with people of low functional literacy in English. All 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 who originally made 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.

Our objectives for this approach were:

1. to document interviewees' experiences in a vivid manner
2. to seek ways to keep interviewees' words in a prominent place in the forefront of the research
3. to find ways in which interviewees' words might have an appropriate influence in debate about national literacy and employment policy.

The illustrations in the current report comprise a subset of a forthcoming document in our *Adult Literacy and Employment in Wanganui* series, to be entitled *Voices from the Wanganui Literacy and Employment Research Programme*. The origins of the current and the forthcoming *Voices* reports were that as researchers we were highly impressed with the penetrating insights often provided to us by the persons of low formal literacy in English whom we were interviewing. We believed it was important to seek innovative ways to privilege these voices to the extent possible.

One major intention for the forthcoming *Voices* publication is that we will use it in repeat interviews in the longitudinal research programme, to provide feedback to the same and new interviewees on what we learned in earlier interviews. Additional objectives for that publication will be:

1. to provide feedback to interviewees on what they and others had said in a supportive and accessible manner
2. to indicate to interviewees that they were usually not alone in being of low functional literacy
3. to use the illustrations as a stimulus to further draw out interviewees' experiences and perceptions.

Meanwhile, for the current policy report, we have chosen 12 salient issues, each represented by one of the illustrations, and each germane to current pol-

icy debates or issues. In each instance we have provided a commentary and a reflection on relevant national policy.

This report also proposes what the authors believe are policy changes needed to encourage productivity at work. The Workplace Productivity Working Group (2004) states 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). Yet the importance of literacy for all in building a more developed society has often been identified – as stated in *Te Kāwai Ora*, “literacy is, at its very heart, a pivotal component of nation building” (p. 19).

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 included.

All those researchers and other facilitators in this programme who interviewed people of low functional literacy in English stressed the privilege of working with them. We heard accounts of privation and great achievement. Attaining high levels of literacy is a complex and demanding process at the best of times. When the dice are heavily loaded against people for a myriad of socio-economic reasons, their achievements in literacy are even more impressive and admirable.

We hope these depictions of ordinary citizens speaking in everyday Wanganui settings will help advance their points of view to where they should be in the foreground of policy consideration and action.

2. Barrier to Literacy: Health-related or Physical Issues



Commentary

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

We noted that many of our respondents described these barriers of health, schooling and goals many times, from which we inferred that these are the barriers to literacy about which our respondents were most passionate or troubled. They were also the barriers mentioned by the largest number of respondents, that is, they 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. Statistical analysis of data from the NZ IALS and national censuses (Culligan, Arnold, Noble, & Sligo, 2004) then indicated that learning disability or health impairments prevalent for 6 months or more had a strong association with low achievement of literacy (p. 47).

Many of our respondents who described health as a barrier to literacy also described the adverse impacts of too much 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, complex and persisting follow-up solutions.

Reflections on policy

One of the useful insights for policy makers arising from this is that strong interconnections exist between low literacy attainment and health, schooling, personal goals, and family environment. This suggests what we take to be a holistic link of such issues.

A holistic interpretation of literacy, health and their concomitants might also evoke traditional perspectives on Māori health. This is more than just well-being or lack of it for an individual. Māori health is often depicted as being linked to whānau health and wellbeing more than to the individual, and is also connected 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 gave 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, evidence from the current research suggests that a holistic perspective on health and literacy is likewise appropriate for members of other ethnicities interviewed in this programme. The approach taken in *Te Kāwai Ora* (2001) is therefore of general relevance, as indicating a "need for a view of 'waioara', or total well-being, to underpin the (adult literacy) strategy" (p. 44).

The magnitude of health and physical problems impeding literacy learning indicates the urgency of addressing ways to ensure children who miss school are helped to catch up. Such interviews suggest better identification and support systems are needed for people with poor eyesight, hearing loss, ADHD, dyslexia, and related conditions that undermine 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. In discussions on 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, which would be one attempt to try to stop the cycle of non-learning brought about by alcohol, drug and peer pressure problems, thus stopping adult literacy services from being the "ambulance at the bottom of the cliff" (Sligo, Culligan, Comrie, & Vaccarino, 2006).

3. Barrier to Literacy: Motivation to Learn



Commentary

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 discounted their own efficacy and have written themselves off as potential learners. We found in our interviews that motivation to learn often receives a boost at the point when a person takes stock of their life, often following positive influence from a trusted person such as a family member or highly respected school teacher. At this point too it helps greatly if a person has a specific target in mind, then has the insight that learning can be an enjoyable experience, and that former feelings of inadequacy about learning can be mitigated.

When a person returns to learning, motivation to learn needs sufficient space in which to continue developing. By this we mean that that a series of facilitators need to be in place, for example:

- regular and predictable transport is needed to the learning venue;
- fees must be low enough or free so as to not daunt people on low incomes;
- sufficient time must be available, free from work or family commitments, so that the complex task of learning within and beyond the classroom can happen;
- literacy classes should have no waiting lists so that the newly found resolve to learn is not dashed through lack of opportunity.

In the absence of any of these facilitators, while motivation to learn may well be high, any reason may deter a person from committing to or completing a course of learning.

Reflections on policy

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. We have noted that at the point when a person gets a job, their attendance at literacy courses and therefore their formal literacy capability-building often ceases. We surmise this is because the challenge of undertaking often full-time work, perhaps coupled with ongoing family requirements, makes allocation of time to classroom learning too difficult.

This means the individual has possibly entered a relatively low-level job, and development of their human capital is probably uneven at best thereafter. Should an economic downturn occur, the individual is once again at risk of being made redundant. This cessation of learning is therefore likely to be unsatisfactory for the individual's progress in competency building, development in the stock of organisational capital, or achieving national goals of prosperity and social inclusiveness.

The current funding climate in adult literacy provision calls for programmes where "the focus will be 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).

While providers in the Wanganui region would support this, they emphasised that there is “no quick fix” to problems of adult literacy. Some felt this view received little recognition; therefore funding does not reflect it. 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 implementation of this policy through the funding and outcome assessments currently in use raises questions about whether lifelong learning approaches are truly being employed.

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).

Urgent and continuing efforts are needed to engage people at the lowest levels of functional literacy in on-going training and development. Research in both 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 where success is measured entirely or mainly on getting people into work, 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 training schemes that cover both 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, 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 the provider knows 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 and work ethic skills such as time management and punctuality. Often, this training would need to be held within work time.

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

The providers of literacy services to whom we talked 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 all these dimensions in their teaching practice. 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.

In a recent discussion with many Wanganui providers on assessment procedures used to measure outcomes within adult literacy provision, it was emphasised that while unit standard achievements and employment outcome measurement required by TEC were useful, they were by no means 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. 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 the cessation of drug and alcohol use can be critical steps in an individual's learning life. 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 in importance 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 undertaken in the United Kingdom in measuring soft outcomes (Cookson, forthcoming), both to present such outcomes in ways suitable for reporting to funding bodies and to use with individual learners to show their progress.

Fortunately, there is a developing re-orientation of national educational policy to the much broader field of competencies (skills, knowledge, values, and attitudes) and away from a focus simply on the limited area of skills (Ministry of Education, 2005b). This appears to have good prospects for building a more comprehensive perspective on adult literacy, given that values and attitudes dimensions 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, much more is demanded of them than if skills alone are the focus. However, this approach needs to be supported with adequate funding and resourcing.

Providers of adult literacy services generally supported the use of core competencies as a baseline to develop ways to measure learner progress and outcomes. A provider noted that many literacies might be needed to prepare an individual for a career in a given workplace – which may differ markedly from the literacies required elsewhere.

As the purpose of a provider's funding is to enhance the employability of its learners, it follows that providers need to build learners' skills not only to attain a job, but to maintain it. The suggestions above for a post-placement support programme and the need to recognise and fund the importance of developing soft as well as 'hard' skills are essential in optimising employment.

4. Barrier to Literacy: Difficulties at School



Commentary

This category of difficulties at school includes problems with learning styles, where respondents often stated 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 often wanted to talk about such issues. Many respondents 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 also commented on the feelings of dysfunction and alienation 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 all believed 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 students 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, believing the school system should provide both communication and life skills.

Educationalists have often been at pains to contradict any such employers' notions that schools exist merely 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.

For some time now a statistic mentioned in educational circles and elsewhere is that around 20% of school leavers have poor literacy and numeracy. By way of validation, the 2004 NCEA results showed that 21% of school leavers that year had less than level 1 of the NCEA. In all 13% had no credits or fewer than 14 credits, and eight% had 14 credits but had not achieved NCEA level 1. Commenting on these figures, Education Review Office CEO Karen Sewell offered the view 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).

Reflections on policy

The employers we have interviewed still lack understanding of how the NZQA qualifications system works. They seek intuitively straightforward benchmarks, such as in the form of pass or fail statistics, to provide them with insights into how to rate a job applicant. There is also confusion (especially among small employers) about what is perceived as a very 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 NCEA is finding some slow and gradual acceptance among some employers.

One suggestion from providers to ease the transition from old Certificate based systems to that of unit standards, is to reformat the way in which the Record of Learning is presented. Each individual is usually required to insert their Record of Learning into their curriculum vitae, which shows a potential employer a numerically ordered list of the individual's credits. Wanganui providers suggest that the Record of Learning credits be, by default, clustered instead under their relevant unit standard, or clustered under subject headings (for example, 'English') to allow for a more general understanding of the relevance of the credits to particular subjects.

Wanganui literacy providers agreed that employers consistently sought a vocational or functional approach to workplace literacy. The providers were broadly in agreement with this, noting that courses that resulted in a qualification or practical outcome possessed a strong appeal that would attract 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.

The practitioners whom we interviewed would support the point made recently in a Ministry of Education report to the effect that effective teaching might well feature “explicit teaching of literacy” (Ministry of Education, 2005a, p. 4). That is, to meet individual needs, literacy teaching and learning as such need 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 of the practical problems with a vocational-focused literacy policy is that no-one can claim to have a clear grasp of the needs of industry in the medium term. In this rapidly changing world, new job categories constantly emerge and current work specialisations evolve quickly.

Therefore, human capital development targeted only at existing vocational needs is, in effect, planning for the past. Sophisticated literacy policy, effective within both vocational and community settings, is needed that genuinely builds adaptable, connected, and confident citizens with a high level of problem-solving and analytical abilities. These citizens are necessary both for growth of the enterprises in which they may be employed, but also for community development. A tolerant, enduring, and inclusive society is built on active local voluntary organisations, successful businesses, and socially bridging networks that sustain a prosperous economy.

Literacy providers, of course, have diverse goals, and some, along with other concerned community agencies, were strongly of 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 other 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 in 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 emphasized on several occasions. While the need for qualified tutors was endorsed by all providers interviewed, 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 in community-based adult literacy provision were non-existent.

We believe a clear focus for policy must be how to keep learners in school. New Zealand research has demonstrated that the level of educational attainment is the “strongest predictor of subsequent adult literacy proficiency” (Culligan, Arnold, Noble, & Sligo, 2004, p. 53). This study also noted that “the effect of educational attainment could be mediated by a variety of other factors, not least of which were early childhood family and school experiences” (p. 53).

Of course such provision for people of low functional literacy does not come cheap. Yet, 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, why should New Zealand once again not be an international model for excellence in social policy?

5. Barrier to Literacy: Lack of Transport; Isolation



Commentary

Multiple forms of disadvantage were often evident, 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. Privilege seems unitary and simple in comparison with disadvantage, which is seen 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, young people at risk might for the first time, 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.

Reflections on policy

Our provincial stakeholders in this research have remarked that policy often seems designed for the cities and larger towns, and does not sufficiently take account of the needs of people in small towns and rural New Zealand. In discussions on 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 in Wanganui because of its provincial location. An employers' representative noted that it is very hard to encourage ITOs to come to the provinces. Better flexibility in response to individual circumstances is sought to ensure 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.

We believe Wanganui has some justifiable claim as a model for such collaboration at provincial level, with local collaboration existing there essentially from a local awareness that this is a sensible and appropriate action to take, rather than flowing from any national initiative or mandating. We recommend similar collaboration in other, less obviously cooperative regions, should be rewarded and encouraged from Wellington.

6. Barrier to Literacy: Low Confidence



Commentary

Lack of self-belief is a substantial barrier to acquisition of literacy abilities as an adult. Low self-belief does not, of course, emerge from nowhere, but is usually painfully instilled over time. Thus it has deep and persisting effects on individuals' self-esteem and what they are prepared to venture in their lives.

What is needed is nothing less than a national transition to a society in which the vast majority of citizens see educational self-cultivation first as a goal in its own right, and then as a means to attain professional and social success. Associated with this is the need to instil the belief that persistent effort and self-discipline are worthwhile, and will have transformational effects in a person's life. People already understand this in relation to sporting success – why don't we believe it in regard to the rest of our lives?

Of particular concern is the already noted failure of around 20% of school-leavers to attain good literacy. But it is not enough to load expectations for achieving this solely on the over-burdened school system. Parents in particular, through their strong relational bonds and emotional support, shape their children's achievement for better or ill, most especially in the formative years, but also beyond.

Yet parents themselves often need focused support, not necessarily just from the state, but from community sources by means of the networks that comprise (or ideally should comprise) various forms of social capital.

Reflections on policy

A national transition to a society as pictured above is of course a huge ask. Some impetus in this direction will be obtained from a sequence of ambitious, multi-method, and enduring social marketing campaigns, targeted in particular at the importance of education 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.

Also critical, however, is carefully targeted reinforcement for such campaigns by a variety of means at the community level. It is necessary to insert into community groups' mores and assumptions the view that education and success are linked, and 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 become a full participant in the global knowledge economy. Piecemeal, insufficiently focused, essentially uncoordinated policies and programmes will not suffice.

One of the unaddressed challenges in adult literacy is that for every individual who undertakes literacy training, there are several or many others with low literacy and/or with a poor self-conception of themselves as adult learners, who are not yet in training. Johnston (2004) estimates that over half a million New Zealanders may currently be at IALS level one (p. 6). Culligan, Arnold, Noble, and Sligo (2004) used the 1996 and 2001 Censuses in combination with the 1996 IALS survey to build a statistical model to predict the current number and proportions of people at IALS levels one and two. They estimated that 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).

A number of those people we interviewed who were not participating in literacy training shared stories of disrupted schooling, low confidence and low self-esteem affecting their study, thus creating learning barriers. These people also need foundation training and lifelong learning. Certainly foundation training alone is insufficient for individuals, for companies, and for the nation. The current, narrowly focused, short-term training system cannot solve the underlying, broader literacy problem and will not create the basis for lifelong learning.

Our interviewees sometimes told us that through their literacy learning they also gained in confidence building, time management, and resilience at work, all of which employers seek. Yet when such outcomes did occur, they were more happenstance, resulting from quality provider teaching, than the outcome of rigorous lifelong learning policy.

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. As noted earlier, 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.

As noted earlier, there may also be a role in this regard for ITOs to collaborate with employer organisations, but there are problems of scale in more remote regions. In addition, there is both a lack of awareness of these sources of potential collaboration and the practical barrier of attracting ITOs to provincial centres like Wanganui, let alone to rural businesses. Collaborative activities among ITOs may be part of the solution.

At national level the TES 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 cooperation and coordination are important and could lead to improved outcomes for clients and providers alike.

Yet there are systemic difficulties in the way these small and isolated providers feel 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 it promotes collaboration not competition among providers. The literacy provision system is simply too fragile, ill-resourced, and urgently in need of sharing of best practices, to justify a competitive arrangement.

There are also indications that systems of contracting literacy services can be destructive of capacity building, and may 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).

Further, the short-term nature of available 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.

The close link between the provision of adult literacy training and successful employment outcomes offers an interesting conundrum in terms of the often-expressed need for lifelong learning. The overwhelming response from the community survey was that the need to find or keep a job was the main reason people would undertake further training or education. The provider survey also indicated that the main reason people were in training programmes was to obtain a job.

Providers whose funding is particularly linked to getting students into employment note that acquiring a job is a major (and acceptable) reason for students not finishing the course, raising the question of any further development of literacy and life skills. This narrow interpretation of the purpose of learning and training is further reinforced by the continuous messages given by government funding bodies and various employers' representatives.

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

Further, while employers are generally happy to provide job-specific training, they do not believe it is their role to become involved with teaching functional literacy to employees. 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 about correlations among advances in competencies and beneficial outcomes for the firm, that employers find credible, is needed.

We believe the policy and funding focus on functional literacy and employment training hinders endeavours to provide the environment needed for lifelong learning and thus, a knowledge economy. 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 motivational challenges 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 of students or for students to continue further learning once the immediate objective of a job is obtained. The challenge at governmental level is to move beyond the rhetoric to institute practices that can truly encourage the growth of lifelong learning. While some research has been undertaken in the New Zealand context on this topic (e.g., Benseman, 2005a; Benseman, 2005b; Culligan, Comrie, Vaccarino, & Sligo, in press), more is needed to explore its implications for both community and enterprises.

Our surveys of literacy providers also raised concerns about the impact of funding systems on the ability to deliver effective teaching and learning. In a feedback meeting when we shared research results with management and

tutors from training providers, tutors strongly voiced the view that funding levels were inadequate for the job, reflecting their recognition of the importance of additional holistic development support for students. The survey found a widely expressed need for more money for resources, programmes, and staff development.

One adult literacy provider reflected on the potential development of 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. Another useful professional development tool is research. Research funding, however, 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.

Other points made during by Wanganui literacy providers included the following, which we include here, more-or-less verbatim, since they provide a clear overview of current problems and issues:

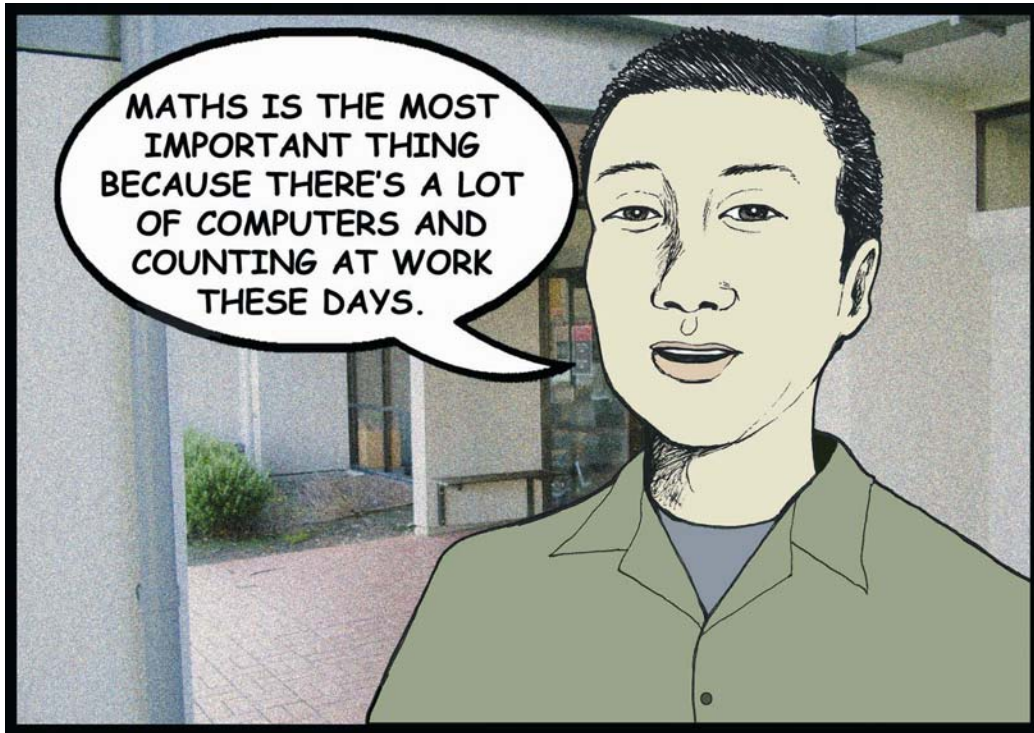
- Providers should have a strong professional association. Currently, providers have access to a newly-formed professional association which, like any organisation of this type, will require substantial resources and development to play its part in the field.
- Obtaining sustainable long-term funding is a major issue for all providers. They do not have clear accessible information about the full range of available funding or the criteria that apply to it. It would be helpful to have a clearing-house of information about funding sources and resources rather than each provider having to seek out and interpret their own information.
- Local employers do not contribute to the cost of work-based follow-up training, which impacts negatively on the amount of follow-up support to

learners in the work-place. There is some support, but usually only to meet demands of the funder, and there is not enough resourcing to provide ongoing support to learners.

- Two providers saw TEC's funding of workplace training as having potential for Wanganui. However, the criteria need to be interpreted flexibly to enable providers to deliver to more than one organisation at a time.
- 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.
- There should be the opportunity to group together learners so providers can collectively qualify for funding.
- It is a challenge trying to meet the full literacy needs of students within what is often an unrealistic funding regime. There are gaps between what funders identify as outcomes and what resourcing will provide. There are often unrealistic restrictions in terms of funding which determines the duration and depth of training.
- Funders expect providers to have a commitment to professional development and continuous improvement, but many providers have been of the view that funding levels have not made a sufficient contribution to this.
- Nevertheless, providers are being asked to identify professional development needs when applying for funding. TEC advises that the funding given should include this, but more clarity is needed as to which elements in the funding should be targeted for professional development.
- Marketing and collaboration. In light of the lack of knowledge about providers, what they do, and who to contact, providers agreed that there is a need to market PTEs as a group as well as individual organisations.
- Some local providers spoke of Australian models they had experienced (in Victoria and NSW) where there is much greater involvement by the employers, and employers contribute to the cost of programmes. In Australia there appears to be more continuity between learning on the programme/ course and learning on the job.
- Several providers commented that the Literacy and Employment research project had raised the profile of several of the agencies, and had also provided a potential 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".

- There was agreement that while 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.
- Some felt that the goal of common assessment could have pitfalls in trying to achieve “one size to fit all” when there are marked differences between courses and programmes, participants and providers. Providers placed more value on measuring progress throughout a programme than on formal assessment. What will work with one provider with a particular group or individual may be inappropriate with another.
- Records of learning. There is still much work to do to determine how best to process information, and to cluster data in ways that effectively meet the needs of learners, funders and providers.
- The question was asked, “How can the various organisations and stakeholders (providers, ITOs, TEC, DOL) work together to optimise positive links between programme learning and on the job learning?” Providers observed that they had not yet identified how best to integrate learning in a course or programme with learning on the job. At present, there is no clear role for the provider in this continuation of studies. Learners can often be self-limiting in terms of their literacy: once they have gained employment they are not motivated to continue with their learning.
- Providers reported that they got a mixed reaction from employers about unit standards, and it was accepted that many employers found these standards confusing.
- Employers are reluctant to release employees to attend courses, reflecting the small size of local businesses. They cannot afford to lose time and productivity.
- Potential learners with literacy and numeracy problems may be unlikely to undertake correspondence and other distance education options.

7. Literacy Need: Numeracy



Commentary

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. We found no indications that the advent of computers at virtually all points in the workplace meant people 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. Even if a person has been trained in how to use a spreadsheet, garbage in is still going to be garbage out.

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 group 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.

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

Reflections on policy

We found that the integration of literacy and numeracy into vocational or other such courses is supported, overall, but creates significant difficulties for some literacy training providers. On one level integrated literacy and numeracy training makes sense and we support it, as a logical and appropriate attempt to locate foundation abilities in occupations and 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 entirely.

Most providers support integrated literacy; although some are unclear 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.

All our research suggests substantial variability in literacy and numeracy levels among learners, which makes for unsatisfactory individual and group 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 1 day a week to learn particular skills or units.

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.

Feelings of estrangement and loss of confidence also occur for those with lower levels of literacy who are removed from the larger group of learners. They feel they no longer belong, which isolates them from their learning and undermines their capacity to continue. Similar concerns apply to literacy as to numeracy. Just as a person has to feel confident in their ability to think mathematically, they still need confidence along with word and sentence attack skills in their literacy. It is certainly a good idea to embed numeracy and literacy within contexts that help build broader forms of human capital, along with organisational capital. However, there has to be something to embed, i.e. people still need a solid basis of literacy and numeracy capability.

Some adult literacy providers sought more guidance on how to integrate literacy and numeracy tasks within a vocationally-based course. As different occupations require varying applications of literacy and numeracy (once a solid basis of literacy and numeracy capability has been ensured), guidelines for use within vocational programmes would be useful.

In our view, the current TEC practice of requiring providers to include functional literacy as a component part of other training courses is appropriate as 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. It is important that the 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.

In particular, literacy should not be seen as purely a means to some other end, such as heightened performance in a particular job. Aptitudes in traditional literacy are associated with so many other important qualities in the modern work environment (such as communication competency, self-confidence, self-esteem, self-efficacy) that even from a functionalist work perspective alone, building literacy is important in its own right.

8. Literacy Need: Formal Workplace Qualifications



Commentary

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 the light of the 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.

Reflections on policy

We are aware that the Government's Industry Training 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 at the date of writing the evol-

ing tertiary reforms before government that will result in a new Tertiary Education Strategy and Statement of Tertiary Education Priorities.

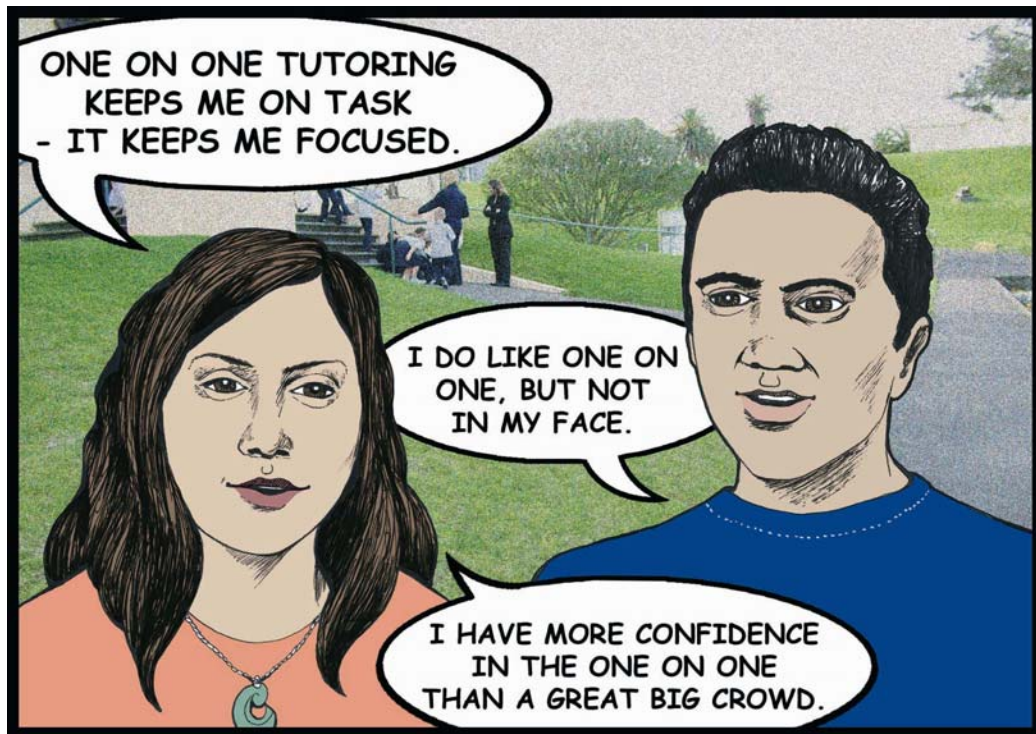
However, we believe it is necessary for a new Industry Training Strategy, or rather, an Industry Training and Development Strategy, to be prepared. This would provide high-level direction for the business implications of this important area, to be explicitly linked with the new TES and what we see as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

An Industry Training and Development Strategy would be one useful step in integrating the relevant Government strategies, especially the Adult Literacy Strategy (ALS), the Tertiary Education Strategy (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.

However, we currently see unevenness in these strategies' articulation and their outcomes. In particular, work needs to be done in the area of the meaning of lifelong learning, what is being sought here, and how it is to be encouraged. Lifelong learning appears more as an optimistic goal, rather than as an outcome that is being pursued by some logical and systematic means.

It is also important to guard against the rhetoric of lifelong learning being used to promote workers' education in a way that serves only to narrow job needs, and offer learners little in a holistic sense (Thursfield & Henderson, 2004).

9. Literacy Need: Learning One to One



Commentary

Our interviewees expressed a range of perspectives on whether learning needed to occur one-to-one, or whether participation in a class with others was sufficient. We found that the most vulnerable individuals possessing a serious lack of confidence needed significant support in getting ready to become competent adult learners. Frequently, before much progress could be made with literacy as such, people needed to build their communication competencies, self-esteem and self-confidence, on which 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 we found that in many instances they were capable of working through these anxieties when they realised that this new literacy learning experience was very different from school. In such a transition, as learners were coming 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 learners' old apprehensions about being picked on or feeling inadequate if they did not know 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.

As already noted, it is normal for a wide range of abilities to be evident in a given group of learners. Steps need to be taken to ensure that if it is evident to the provider that one or several persons are slipping behind, special provision on a one-to-one basis needs to be made if previous gains are to be maintained and built upon. While no exact prescription is possible on whether new literacy learners need one-to-one or group-based learning, for more vulnerable learners, and if progress is slower, there should be provision for one-to-one support.

As also noted earlier, policy-makers may struggle with how to measure the benefits of enhancements in soft skills. Yet it is clear to us that without such soft skills development, literacy development is unlikely to follow. The interplay between soft skills and a person's early progression into a developing literacy, in turn indicates what form of learning is needed for that individual's circumstances.

It is predictable that there will be no causal relationships discernable between literacy and soft skills training at the level of the firm. In the absence of ways to measure soft skills' outcomes in a quantitative sense, qualitative assessments should be sought. Indeed, observational and self-report data are gathered by some providers to substantiate quantitative data sent at reporting intervals to funding agencies. Other potential qualitative approaches to measuring soft skills are likely to include correlational studies of soft skills development and beneficial work outcomes such as greater problem identification; an increase in suggestion scheme proposals; an increase in workable proposals from such schemes; testimonials from managers and staff; or case studies and incident studies of benefits linked to literacy learning.

Reflections on policy

Policy needs to be sufficiently flexible 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 on the relative value of one-to-one or group support, underlines how important it is that literacy providers should in fact be permitted to act as professionals, and be regarded as such. Professionalism implies conditions: a strong professional association for providers needs to be well-resourced; providers should derive insights from and contribute to a shared body of knowledge; they should have access to appropriate training; have job security; have a realistic career path and associated pay scale; be mentored in supportive ways; be paid as professionals; and be able to keep up with new developments in literacy learning and technology.

At present, a scenario of this kind is an ideal, and a long way from the current situation which features a *mélange* of providers working to competitively sought, short-term contracts (often of only one year's duration) oriented to economic-related outputs. Yet it is only when literacy provision has made it to the next level of professional evolution that appropriate decisions can be made on a case-by-case basis on which form of learning is best suited to the individual who presents for literacy training.

In terms of literacy interventions at work, we know that workplaces are sites of complexity and normally resist easy cause and effect assessments of what outcomes were "caused" by which interventions. Managers and other organisational stakeholders need tools that will help them understand, in multifaceted conditions of organisational change and development, what correlational rather than causal evidence is available when deciding about outcomes from literacy training. Often correlational data are the best available.

10. Literacy Need: Digital Literacy



Commentary

Digital literacy is clearly one of the more important clusters of competencies and attributes for the 21st century. And, like many other aptitudes, what young people grow up with in their home environment and assume to be normal will hold no fears for them; mastering new technology comes relatively easily when people are surrounded by it from an early age. However, those concerned to put right the “digital divide” often assume 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 6 months, it is uncertain they will 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 there-fore 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 com-puters appear for the first time in people's homes. For example, our research with some refugee families has indicated that e-mail gives them an opportu-nity to connect with extended family in other countries, thus providing an impetus for them to improve their own reading and writing.

Reflections on policy

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. Among them is quality of hardware. Machines supplied under such schemes as the Computers in Homes initiative should not be cast-off ones that 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 through 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 Com-puters in Homes need to be guaranteed as accessible to the families involved for at least 2 years, to give time for technological aptitudes to bed in.

11. Pathway to Literacy: The Power of Personal Recommendation



Commentary

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

Yet we found major mismatches between what individuals originally thought literacy comprised, and the actual growth and development 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 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.

In general, therefore, mental associations with literacy were either a blank, or negative. 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 needing to be done to deliberately target potential participants. Considering how enthusiastic our interviewees were about the transformational outcomes they experienced, we believe many possibilities exist for systematic marketing and promotion of literacy courses. Yet that potential remains unrealised. Literacy providers themselves generally do not have the funding or the expertise to engage in high-quality marketing. Provider organisations tend to be fragmented and necessarily focused on short-to medium-term survival, and so, realistically, cannot undertake 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 publicise 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.

Reflections on policy

To enable 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, future research needs to investigate the dynamics of bonding and bridging ties along with relationships of trust, which comprise an individual's social capital.

If adult literacy policy is to be truly inclusive, it needs to contain the wherewithal to market courses to potential participants in ways 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. It must also allow genuine insights into the excellent depth and range of learning available from many courses.

It is relevant that in the 1996 IALS survey, 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 community survey that most community members took adult literacy for granted and assumed most people possessed such abilities. Predictably for a community that had little idea of literacy problems, our survey respondents lacked awareness of literacy providers to whom 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 this was the mindset among most, even educators, before the 1996 IALS survey revealed widespread problems with the population's level of literacy capabilities suitable for modern and complex work environments. This lack of awareness of literacy issues and services come together to indicate the importance of creating general awareness of what excellent literacy comprises.

We believe that if policy is to drive the formation of a high social command of literacy, then both government and providers need to raise community awareness of adult literacy as an issue in our society and a basic prerequisite to employment.

12. Pathway to Literacy: Goal Orientation



Commentary

For many of our interviewees, the impetus for their becoming engaged in literacy learning was some kind of personal goal orientation. Sources of such goals were diverse, ranging from a newly identified desirable career or occupation, rejection of continued low income, a sense of family obligation or the 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 had to.

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 therefore both reinforce people'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 unpredictable.

Reflections on policy

We believe comprehensive directional support systems are needed, including counselling for career and life direction, and ways through which people can access strong role models. An important element in strengthening and formalising an individual's goal orientation is personal development plans. A trend towards personal development plans has been noted such as in larger organisations in other countries, e.g. in the UK (Personal development plans, n.d.). These development plans 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 adult literacy providers) as a focused way to help literacy learners more clearly define their personal aspirations and then reach them.

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 change luck or chance processes into a more formalised part of a person's development.

Fig. 1 below (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.

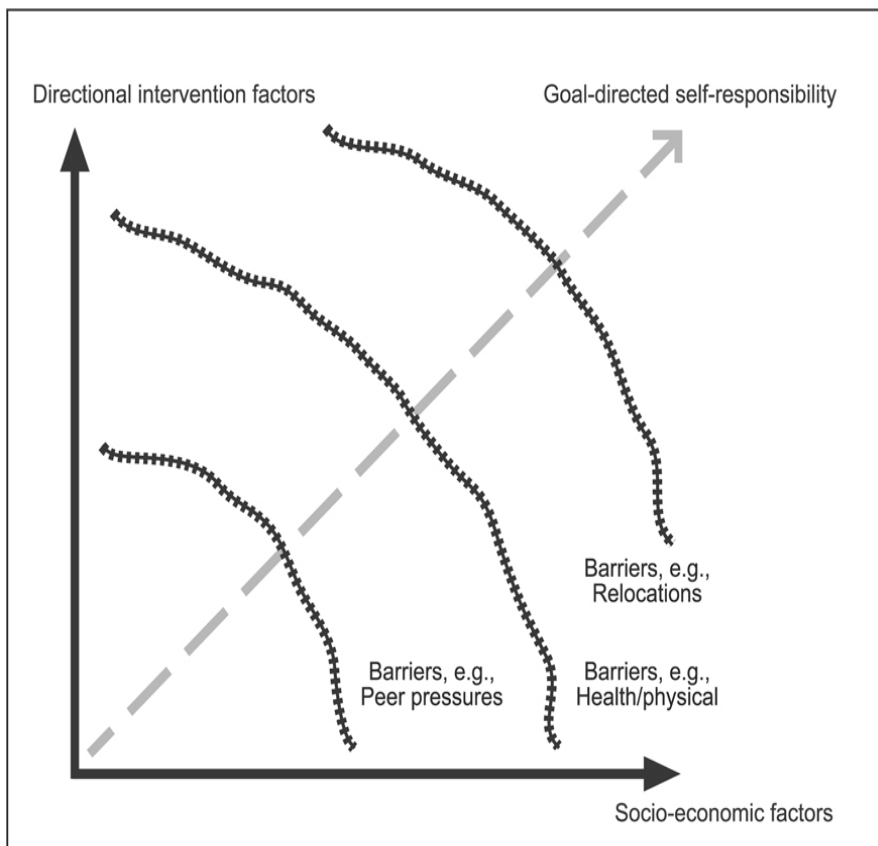


Figure 1. Barriers and personal development plans

A low score on both axes signals a condition of deprivation and low self-image, self-esteem, motivation, and confidence. In conjunction with this is the probability of lessened goal-directed self-responsibility for learning. Yet if socio-economic barriers are reduced, and a stronger sense of purpose is instilled, improvements in self-responsibility in learning should result.

For improved learning to occur, factors on **both** axes need to strengthen, and individuals themselves need to see the point of personal commitment to a goal. However, even if a person has been inspired by someone who has shown them a pathway to attaining 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 a series of 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.

13. Benefits of Literacy: Communication Competency



Commentary

Many of those we interviewed identified better communication and interactional competencies as highly beneficial outcomes from their literacy learning. They also recognised the extent to which such abilities are linked to feelings of success or actual promotion at work. Certainly there is a close relationship between advances in literacy in the workplace and a series of other attributes. Improvements in literacy often correlate positively with a person's growing ability to suggest changes or improvements, their sense of being trusted to be competent, their openness to reveal when they do not understand something properly (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 social and work institutions, then social policy has a better chance of actually having more positive effects. Multiple literacies, of course, reveal themselves in subtle and diverse ways. For example,

a person of relatively lesser status at work may nevertheless be sought out by workmates on account of his or her special expertise in some area, social facilitation skills, or for an opinion leadership role within the organisation's informal communication. Such individuals often serve liaison roles within an organisation or occupational group of some kind. They may serve to facilitate interactions in and between diverse groups and systems, thus creating social connectedness and building potentially high levels of bridging social capital.

Reflections on policy

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 something similar. There is justification for this, in any event, in the often-noted association between literacy learning and development of other, communication-related competencies.

For businesses, too, transaction and compliance costs (such as costs of supervision and quality monitoring) diminish as staff develop the competencies to form themselves into successful self-managing teams and carry out control and quality functions by informal means. In this way the national need to upskill the existing workforce is served not so much because of any government intervention, but more because of a progressive evolution to a higher quality workplace model.

Research has often noted the propensity for very cohesive teams that have strong group performance norms to achieve excellent 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 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, and is complemented by other facets we have already discussed, such as interactional skills, and self-confidence in decision-making and in identifying workplace improvements. But human capital needs to be understood in a context of organisational capital, meaning the application of human competencies within particular work-

place environments. It is the progressive application and rising sophistication of such abilities at work that spurs social and economic benefit.

Therefore, in our view literacy policy needs to be tied more securely not just to broader considerations of human capital at high levels of human performance, but also to a clearer set of intentions pertaining 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.

As noted previously, we believe 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 the case in SMEs, where the opportunities for formal training as such are normally poor, but where opportunities for personal development may exist via various in-house and external initiatives.

Government initiatives such as upskilling the existing workforce are at risk of being too restricted if they focus mainly 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, attitudes, 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 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 adult literacy development and other forms of human capital development deserves explicit recognition in policy.

In our view, the Adult Literacy Strategy has served a useful purpose in allowing a variety of stakeholders to address issues of adult literacy and to point a direction forward. However, we believe its alignment to the problems of low literacy is now outmoded. It should be replaced with a Lifelong Learning Strategy that should include foundation learning at its base, but beyond this be oriented both to the needs of nation-building and the formation of 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 WPWG states 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 is fragmented, poorly resourced, and lacking in direction. Even if an ITO sees the need for better adult literacy in its industry, the high costs and dubious outcomes from such engagements tend to prevent or limit its involvement.

We believe 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 to Modern Apprenticeships where necessary, and generally to promote their transition to Industry Training and Development Organisations.

14. Discussion

National confidence in adult literacy ability was heavily dented by the 1996 International Adult Literacy Survey, findings from which suggested nearly half of adult New Zealanders had literacy abilities lower than those deemed necessary to function within the context of a modern knowledge economy (OECD, 2000). These findings prompted the development of a national Adult Literacy Strategy (ALS) emphasising quality control and increased access. Yet this area still features a diverse patchwork of different adult literacy training providers, usually working on short-term contracts, charged with delivering specific, economic-related outputs.

It is clearly an urgent national goal for New Zealand to transform itself into an export-oriented economy with substantial value-added resulting from a high level of capabilities. The government's growth and innovation strategy in fact has set out a pathway for helping businesses move up the value chain and get them focused on export strategies.

However, too many New Zealand businesses are confined within a mindset and collection of industrial practices that both rely on and assume the long-term availability of low-cost labour. Investment in physical capital including technology is less likely when relatively cheap labour is on site.

In turn, when businesspeople assume they do not need to invest in more sophisticated plant, there is little encouragement to assume they should also invest in organisational capital (individual and team capability-building in work processes). All this is the antithesis of a learning organisation, whose leaders assume both managers and staff need life-long learning, and that advances in human capital development need to track alongside enhancements of physical and organisational capital.

The 2002/07 Tertiary Education Strategy (TES) states that literacy and numeracy form the basis for lifelong learning. However, our research reveals a number of problems with this. First, there appears to be confusion in the public mind and specifically among employers as to what "literacy" means. For many it will still mean something like an ability to display a reasonable command of reading, writing, and arithmetic. Literacy has also, on occasion, been understood in a binary sense – a single cut-off with those above the line literate and those below, illiterate.

However, the IALS-based perspective on literacy advances beyond this, employing a continuum comprising a one to five scale from lowest to highest achievement. In so doing, IALS goes beyond simple tests of reading and writing, and has a particular accent on assessing a person's ability to solve problems. For example, Johnston (2004) describes IALS as measuring "how adaptable people's literacy skills are to other contexts" (p. 12). Such directions in description of literacy go a long way beyond the "three Rs." We believe a more thorough definition of literacy is needed and important.

A mismatch between older but still extant views of literacy, in comparison with the problem-solving emphasis of modern ways of thinking about literacy, helps explain the lack of clear focus on what low literacy "is" and therefore what may be done about it. Beyond this, it also undermines formation of consensus on a consistent national policy and economic implementation framework around building literacy. This is not just an academic debate. Until NZ has a reasonably broad level of national consensus on what literacy means and on its relationship to national and social goals, direction of funding and support for literacy programmes will lack focus.

On the one hand, policy acknowledges ideals of lifelong learning, but in practice we have not yet been able to achieve such ideals nationally. We might all acknowledge in a generalised or knee-jerk manner that "of course literacy is important." This may be a fundamental value to which most would subscribe if challenged on the question whether a low-literacy or high-literacy society was more desirable. However, in important ways, this country has not yet re-imagined itself as a high-skills, high-wage economy, and has not put into place the mechanisms to produce such an economy.

14.1 Foundation, fundamental, and functional skills (or competencies)

In order to permit growth in the knowledge economy, the TES describes the role of fundamental skills in shaping a highly skilled workforce. However, by these fundamental skills the TES means not just functional literacy skills, but "high-level generic skills, such as interpersonal skills, adaptability, critical thinking, creative and problem solving skills ... built upon basic skills such as literacy and numeracy, [which] create a very strong foundation for lifelong learning and ongoing personal development" (Ministry of Education, 2002, pp. 46–47). The TES goes further, stating that while these skills are important

in a developing a knowledge society, they are also critical to a “healthy democracy, and to the development of engaged and productive citizens” (p. 47).

Definitional issues now emerge, as foundation skills seem to be associated with basic language and numerical literacy, fundamental skills are as noted above, and functional skills appear to mean specific preparation for the workplace. While in a nuanced language like English we should not expect completely different denotative meanings, the degree of overlap among these concepts has potential for confusion.

We believe a more consistent and encompassing focus on lifelong learning would permit policy to reduce the use of foundation, fundamental, and functional, in favour of the broader, educationally oriented emphasis inherent in the lifelong concept.

14.2 Lifelong learning

Human development needs inherent in the modern, technologically dependent workplace are complex in nature, and point to the demand for a highly skilled workforce. To achieve this outcome, 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 term 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 the TEAC 2000 report, learning was broadly conceived as including tertiary education and lifelong learning, as well as “the promotion of citizenship and participation in society” (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).

There seems to be a disjuncture, however, between this orientation to lifelong learning in the TES, and the approach embodied in the Adult Literacy Strategy (ALS). The latter is mainly oriented to the problematic absence of literacy, which is a deficit model, and exists in the constraints of the International Adult Literacy Survey (IALS) of 1996. The ALS talks of the need to increase functional literacy levels of adults as quickly as possible. This is a perfectly reasonable aim, but sends quite different signals to policy makers and the sector compared with the TES’s orientation to the positive characteristics of lifelong learning.

This means that in respect of literacy one key difference between the TES and the ALS is literacy level. As mentioned, the ALS is oriented to IALS, and is especially concerned about the manifestations of low literacy. In contrast, the TES describes the need for:

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).

All this locates literacy within a broad and holistic conception of lifelong learning and excellent employment outcomes, rather than focusing on low literacy and its solutions. However, one point of similarity is that both the TES and the ALS indicate coordination of various affected policies and government agencies is needed to maximise literacy policy success.

Thus insufficient coordination exists among the government strategies for Adult Literacy, Industry Training, and Tertiary Education and conflicting signals are 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, as already noted, all need a clear and fo-

cused orientation to lifelong learning. This will ensure consistent signals that the country is serious about lifelong learning and will facilitate this with workable funding and training. In the absence of such consistency, clarity of national intention will be absent and progress to such a goal will be fragmented and uncertain.

We strongly support the current transition in educational policy focus to 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 IALS.

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 that can be measured at the level of individual competence without reference to context (e.g., Barton & Hamilton, 1998; Barton, Hamilton, & Ivanic, 2000; Gee, Hull, & Lankshear, 1996; Street, 1984). However, IALS was a means of bringing issues of adult literacy to the fore and providing a way of addressing them.

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. An approach that tends to focus thinking on functional literacy is therefore ultimately inadequate and will not provide the basis for holistic educational policy.

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).

We have found that people take many varied paths to 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 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 less complete literacy measurements.

As noted earlier, 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 indicates the desirability of raising public awareness of what comprises excellent literacy.

Our Wanganui survey of the public and our interviews with employers likewise demonstrated a low general awareness of deficiencies in national literacy ability. If individuals of a relatively low level of literacy likewise have few insights into their need to develop further, then remedial action is unlikely to be effective.

14.3 Managers and 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). Yet the 1996 NZ IALS result indicates that of people in employment categorising themselves as "Legislators, Professionals, Associate Professionals, Technicians, Senior Officials and Managers", about 29% were of low (IALS levels one and two) document literacy. 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. 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" while 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 managerial/ professionals 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 slightly fewer were at levels one and two, but a similar proportion were at level three.

These data suggest a scenario perhaps common to many enterprises. Managers mainly without high literacy skills (including problem-solving attributes) may or may not be attempting to institute innovative, fleet-of-foot strategies for workplace contingencies, in conjunction with workers who could, however, possess the same low level of literacy or lower literacy again.

If this is correct, it does not auger particularly 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 can be assumed to bear some relationship to the subtle, intellectual decision-making capabilities associated with education. As the WPWG report points out, “most increases in productivity and in living standards 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 and highly literate people have significant advantages in knowing how to find then apply new knowledge, even when it is hard to come by.

At this point the following might be raised – is it not the case that New Zealanders have a liking for new technology, being “early adopters and good adaptors of technology” (Workplace Productivity Working Group, 2004, p. 63)? This may well be so, but it also appears to be the case that we are less good at obtaining 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 and 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.

Recent commentary (e.g., the WPWG 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 by arguing that our quite sudden improvement in employment statistics has meant that formerly unemployed people with a lack of recent work experience have now re-entered the workplace and are re-adjusting to it. It is not therefore 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 a quarter of managers are at the lowest IALS levels, and around two-thirds are at levels one to three, then there is likely to be a leadership and managerial capability deficit of some magnitude.

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.

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.

14.4 Where to from here?

Johnston (2004) has stated “there is good evidence for the benefits of literacy (but) there is 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). Yet in this we see ambiguities and confusion 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 refers to efforts to develop skills at quite low levels of performance.

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

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

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 may well be problematic. Social capital researchers usually draw a distinction between bonding and bridging social capital (Putnam,

2000). A person's reliance on those closest to him or her (bonding capital) contains 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 policy 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).

Before his influential *Bowling Alone* (2000), Putnam's (1993) analysis of social capital in southern and northern Italy linked the north's greater economic 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 relevant to social capital in New Zealand has been carried out (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.

We have already suggested that application of technology without attention to the human and organisational dimension 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 all three forms of capital (human, social, and organisational) are needed for people genuinely to 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 already 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.

As stated in *Te Kāwai Ora* (2001), "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. While they do seek ways to create the conditions that will generate quality employment, such 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.

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 FRST-funded 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 funded by 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. As we have argued, while literacy and numeracy may under some circumstances need focused, stand-alone training, 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 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 the 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 a 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.

15. The 39 Steps: Key Conclusions and Recommendations

1. Learning disability or health impairments prevalent for 6 months or more have a strong association with low achievement of literacy (section 2).
2. Better identification and support systems are needed for people with problems of poor eyesight, hearing loss, ADHD, dyslexia, and related conditions which undermine their ability to build literacy (section 2).
3. Specialist training is needed for those who work with people presenting with multiple health and welfare needs (section 2).
4. Leaving literacy training for employment should no longer necessarily be regarded as positive (section 3). Wider recognition is needed that ceasing literacy training to enter employment does not necessarily serve the students' long term interests or the wider goals of building a knowledge economy.
5. Training schemes that both cover the transition to the workplace and provide follow-up of top-up training are needed for both clients and employers (section 3).
6. Providers were concerned about the inability to measure 'soft' wellbeing outcomes as a reflection of their work and an individual's progress. Progress is needed in measuring soft outcomes and seeing them as a valid and essential aspect of preparation for literacy learning (section 3).
7. There is a need to strengthen existing transitional school to work programmes, so that academic literacy can be transformed into workplace literacies (section 4).
8. A clear focus for policy must be how to keep learners in school, given that a person's level of educational attainment is the strongest predictor of subsequent adult literacy proficiency (section 4).
9. Much better availability of literacy teaching is needed, given that possibly up to 1.2 million adults may have low levels of literacy and perhaps three-quarters of a million are not participating in training (section 6).
10. Client-centred systems within government agencies are needed to make it very straightforward for small businesses to access information and funding (section 6).
11. Competition among small providers for funds promotes secrecy, and results in failure to build on local successes and erosion of community service obligations (section 6).
12. The New Zealand literacy provision system is too fragile, and ill-resourced, and is urgently in need of sharing of best practices, to justify competitive arrangements (section 6).

13. Systems of contracting literacy services can be destructive of capacity building, and may make funders ignore outcomes in favour of a checklist approach to accountability. They may also play down performance improvement in favour of compliance (section 6).
14. The short-term nature of available funding does not acknowledge the reality of the long lead time inherent in the development of proper client training, staff training, and building up of pedagogical resources (section 6).
15. Obtaining sustainable long-term funding is a major issue for all providers. They do not have clear accessible information about the full range of available funding or the criteria that apply to it. A clearing-house of information about funding sources and resources is needed (section 6).
16. 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 of developing and purchasing resources. Funders expect providers to have a commitment to professional development and continuous improvement, but funding levels are considered as insufficient for this (section 6).
17. The integration of literacy and numeracy into vocational or other such courses is supported but is creating problems for some literacy training providers. Providers propose that funding for literacy services needs to be more transparent and stable over time. Providers believe funding for literacy services has been removed, though TEC advises funding remains, but is now provided in aggregated form (section 7).
18. Providers support integrated literacy, although some are unclear on how they are meant to do it. This requires assistance in the form of guidance from specialist literacy tutors to devise and test programmes (section 7).
19. A new Industry Training Strategy, in the form of an Industry Training and Development Strategy, is needed, to provide high-level direction in respect of the business implications of workplace training and development. This needs to be explicitly linked with the new TES and a re-thought Lifelong Learning Strategy (section 8).
20. There is unevenness in the articulation and outcomes of the relevant Government strategies, especially the Adult Literacy Strategy (ALS), the Tertiary Education Strategy (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 (sections 8 and 14.1).
21. Better definition is needed of what lifelong learning means, what is being sought, and how it is to be encouraged. Lifelong learning appears more

as an optimistic goal, rather than as an outcome which is being pursued by some logical and systematic means (section 8).

22. Only when literacy provision is on a more professional footing, 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 9).
23. 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 (section 10).
24. Recruitment into literacy training is often insufficiently structured, with more to be done to deliberately target potential participants (section 11).
25. The competitive nature of provider funding makes it difficult or impossible for providers to deploy resources and energies to publicising their programmes in the community (section 11).¹
26. Adult literacy policy needs to contain the wherewithal to market courses to potential participants in ways that that they find attractive and engaging. Marketing and promotion need to leverage off the important dimension of peer sanction so that interpersonal networks continue to do the work of attracting participants (section 11).
27. 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 (section 12).
28. 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. Literacy and lifelong learning policy needs to be tied more securely not just to broader considerations of human capital at high levels of human performance, but also to a clearer set of intentions pertaining to the development of national organisational capital (section 13).
29. Government initiatives such as upskilling the existing workforce will be too restricted if their focus is mainly just on skills. To build individual and workplace capability, skills needs to be conceptualised more broadly as competencies (section 13).
30. The Adult Literacy Strategy served a useful purpose in getting stakeholders to address issues of adult literacy. However, its alignment to

¹ It should be acknowledged however, that there is sharing of ideas and collaboration across the local Wanganui sector, particularly through the PTE Association and the ACE network. However, it can be argued that this collaboration is not yet optimal due to the competitive nature of funding structures.

problems of low literacy is now outmoded and it should be replaced with a Lifelong Learning Strategy (section 13).

31. In association with reform of the ITS and the ALS, the role and function of ITOs need to be re-thought. The ITOs have often not worked well for small business or in the provinces (section 13).
32. There is still no clear focus on what low literacy is and therefore what may be done about it. This undermines formation of consensus on a consistent national policy and economic implementation framework around building literacy (section 14).
33. Higher order literacies and adequate systems for innovation and continuous improvements often appear to be lacking at firm level, resulting from insufficient high-level literacies. If it is correct that around two-thirds of managers are at IALS levels one to three, a significant national deficit in managerial capability may exist (section 14.3).
34. New Zealand's relatively low labour productivity rate indicates a capability deficit at work, probably including those at work who lack both competencies and systematic opportunities in the workplace to create innovative change and improvements (section 14.3).
35. Smarter technology demands 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; advanced literacy abilities are once again implied (section 14.3).
36. Specialist literacies (human capital) demand a strong basis of social capital (trust, interaction, mutual support) and organisational capital (work skills in actual enterprise settings). But enhancing human capital (e.g., literacy or other skill building) alone is not enough to create high value employment. Creating all three forms of capital is needed if people are genuinely to perform as competent life-long learners and if enterprises are to create high value jobs (section 14.4).
37. 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 (section 14.4).
38. Many government and community agencies understand the need for "joined-up" inter-agency policy, and seek ways to create the conditions that will generate quality employment. Yet strong, effective ways of doing so have not yet been devised, indicating the importance of jointly sponsored research (section 14.4)

39. 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 of learning. 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 a job (section 14.4).

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This paper takes an overview of policy implications arising from evidence gathered to date within the Wanganui Literacy and Employment research programme. As its basis and starting point we have selected a series of statements made by participants in adult literacy classes, whom we interviewed in order to obtain quality, first-hand insights into the experience

of low functional literacy in English and its implications for employment. In this report we have attempted to provide both an emphasis on the experience of these participants, and a comprehensive discussion of ways in which we believe that national literacy policy may evolve for greater effectiveness.

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