

WORKING TOGETHER – 12 AGREEMENTS FOR REFERRAL & ASSESSMENT Revised April 2004

As agreed to by the Literacy & Basic Skills agencies in Waterloo-Wellington: Action Read, The Literacy Group of Waterloo Region, Wellington County Learning Centre, Conestoga College (Cambridge, Guelph & Waterloo Campuses), Wellington Centre for Continuing Education (Upper Grand District School Board), Waterloo Catholic District School Board, and Waterloo Region District School Board.

The 12 Agreements create a comprehensive referral network amongst LBS agencies. Our collective goal is to support adults to access and attend literacy services (assessment & training) in the most appropriate program based on individual needs and goals. Support is the key to student success within the adult education and training system.

Literacy & Basic Skills (LBS) Programs are funded by the Ministry of Training, Colleges, & Universities to provide:

- ✓ Information & Referral
- ✓ Assessment & Training Plan development
- ✓ Training
- ✓ Evaluation of learning
- ✓ Follow-Up

The 3 Goal Pathways for learners in LBS are:

- ✓ Employment
- ✓ Further Education & Training
- ✓ Independence

The 12 Agreements in this document were created and revised by the frontline staff at LBS agencies in Waterloo-Wellington. Project READ Literacy Network facilitates the review of this document as part of our ongoing support to learners, agencies and practitioners. Please contact us with any questions about this document.

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Agreement # 1 – Referral Guidelines

Prospective students are assessed to see if an agency is best suited to serve them, and if it is not, they are referred to the most appropriate agency.

- 1) Each agency will do a referral or placement assessment as part of the entry/intake process or the initial assessment (i.e. Is this adult in the best place to meet hi/her needs?)
- 2) When the intake process involved non-LBS staff members, agencies will endeavour to ensure intake personnel understand and implement their responsibility for directing the prudential student to the most appropriate agency.
- 3) When the intake process involves phone contact or a “walk in” and the learner is not appropriate for your agency, take the person’s name and phone number and refer the person to the next, most appropriate agency. Call or email this agency with the person’s information.
- 4) Information about WHERE to refer student (when in doubt) is available from Project READ Literacy Network.
- 5) The receiving Agency must call the referring Agency to confirm when/if the learner has made contact.

PERFORMANCE INDICATORS:

- Agency track referrals they make and receive.
- Tracking results are presented and discussed at the Literacy Services Planning (LSP) Committees (Waterloo and/or Wellington) on a regular basis.

Agreement #2 – Intake Interview & Initial Assessment

For those students participating in the LBS Learning

Outcomes for the first time, the intake/ initial assessment process include:

- 1) Referral or placement assessment (agreement #1) at intake which includes:
biographical information, signed release of information form, an overview of the organization and an indication of how the person heard about the program
- 2) Goals (long-term and short-term)
- 3) Skill levels (present student level; gap between present level and goal)
- 4) Background info – employment/education history/transferable skills
- 5) Needs/interests/learning styles

PERFORMANCE INDICATORS:

- Completed Intake Forms/Referral Forms
- Complete Training Plans include/reflect the above items.

Agreement #3 - Assessment

Agencies accept and use the assessment results and training plans from other LBS agencies.

- 1) This agreement applies to students who enter training at an LBS agency less than one year from the time of exit from another LBS agency or program.
- 2) In these cases, the initial assessment process is NOT repeated in full. Agencies accept “as is” rather than reassess:
 - ✓ **goal statements**
 - ✓ **personal student data**
 - ✓ **training supports required (e.g. child care, transportation, etc)**
 - ✓ **learning style**
 - ✓ **LBS levels, although these may be reassessed briefly (rather than in full) to ensure placement in program in valid.**
- 3) Agencies may clarify information to ensure it is current.
- 4) Agencies ensure a release of information form has been explained, agreed upon, and signed by referred students before information is passed among agencies.

PERFORMANCE INDICATOR:

- Completed Exit Training Plans or Actual Assessment documents

AGREEMENT #4 – Self-Direction/Self-Management

Self-directed and self-management skills are important aspects of literacy learning. LBS agencies help student gain these skills, and assess form them, as relevant to the individual's goal(s).

- 1) Front-line staff identified skills and abilities that help students make successful transitions among their LBS agencies. These include but are not limited to:
 - work independently
 - get along with others
 - make decisions
 - be organized
 - attend regularly
 - arrive on time
 - complete assignments
- 2) Literacy level is sometimes secondary to the level of self-management and self-direction, particularly if the student is moving into a classroom. Students with lower reading, writing, and numeracy skills may successfully make the transition to an agency's program if he or she has effective self-direction and self-management skills.
- 3) Agencies that plan to refer students to a classroom as the "next-step" will work to help the individual gain self-direction and self-management skills.

PERFORMANCE INDICATOR:

- Self-management and self-directions skills that have been demonstrated by the student are listed accompanying the Exit Training Plan or Assessment documents.

Agreement #5 – The Portfolio

Agencies help student prepare a learning portfolio. The student takes the portfolio to the LBS agency upon referral.

- 1) A student's demonstration activities from the exit assessment will be included in the learning portfolio.
- 2) The referring agency keeps a copy of the portfolio on file for a reasonable amount of time after exit in case the student misplaces his or her copy

PERFORMANCE INDICATOR:

- Agencies follow-up on student referrals to see if further information or clarification is required.

Agreement # 6 – Current LBS Levels of the Student

When LBS levels are used to describe a student’s literacy skill, they refer to the level in which the student is CURRENTLY WORKING.

For example: Let’s say an agency has an entry requirement for level 2 reading. This means that a student should be currently WORKING WITHIN level 2 on those learning outcome/success maker areas relevant to his or her goal, not that he or she has already ACHIEVED level 2.

Agreement # 7 – The Training Plan

The Training Plan is forwarded with the student.

- 1) The student brings his/her Training Plan to the LBS Agency.
- 2) Agencies may forward the student’s Training Plan directly to the LBS Agency, if the student has signed a release of information form. The student may also request that the Plan be forwarded.

PERFORMANCE INDICATOR:

Referring agencies keep a copy of a student’s Training Plan on file for minimum of one year after exit (individual agencies may retain records longer as per organizational policies).

Agreement # 8 – LBS Levels by Outcomes

The Training Plan records LBS LEVEL by learning outcome(s), and includes the exit demonstration(s) or the most recent demonstration(s).

- 1) The Training Plan records LBS levels by learning outcome(s) as relevant to the goal, rather than simply providing an overall LBS level.

Agreement # 9 – Referral Cover Sheet

A “Student Referral Cover Sheet” is included with the Training Plan of students being referred to a LBS agency.

- 1) A common “Student Referral Cover Sheet “is used throughout Waterloo-Wellington (see attached)
- 2) The “Student Referral Cover Sheet” provides the information agencies require so they do not have to repeat the entire initial assessment process with a referred student. (Front-line staff identified information/categories on the referral cover sheet.)
- 3) It is not mandatory that all of the information be completed. The student and referring agency make the decision about which information is relevant to the individual’s learning.
- 4) The “Student Referral Cover Sheet” includes the student’s long-term goals and the goal path, particularly the role of the agency to which the student is being referred.

See “Student Referral Cover Sheet” on next page.

**Waterloo Region/Wellington County
Student Referral Cover Sheet**

Agency/Program where student referred:

Referring Agency:

Assessor's Name:

Student's Name:

Address:

Caseworker:

Income Source: Employment OW ODSP EI Other

Education Background:

LBS Levels at Exit: Reading Writing Speaking/Listen Numeracy

Self-Direction/Self Management Skills:

- Works independently Attends regularly Works well in a group
 Completes assignments Organized Shows decision-making
Gets along with others Works well in a group

Learning Style: Visual Auditory Kinesthetic/Tactile Other:

Date Student entered program:

LBS Level at entry:

Number of hours of training per week:

Long-Term Goal:

Goal Path:

- 1.
- 2.
- 3.
- 4.

Transferable Skills:

Health Issues: Vision Hearing Mobility Medication Other:

Required Supports: Transportation Childcare Other

Will the learner bring: Portfolio? Yes No Demonstrations: Yes No

Training Plan? Yes No

Additional Comments:

"I, _____, give permission for the release of information, "Yes No
(print student's name)

Student's Signature

Date

Assessor's Signature

Agreement # 10 – Delivery Niches

The following skill/task lists are used as a guide to help a student prepare for transition to a LBS agency.

Transition to LBS programs offered by the Wellington Centre for Continuing Education (school board):

- Read simple instructions and process them.
- Follow simple oral instructions
- Do independent work
- Write simple and compound sentences
- Write a group of related sentences on a topic of personal interest.
- Understand and apply basic math operations.
- Understand basic money concept
- Communicate orally in English

Transition to LBS programs offered by the Waterloo Catholic District School Board or the Waterloo Region District School Board:

- Know basic phonics and the alphabet
- Write name and address
- Write a complete sentence
- Read 2-3 basic sentences
- Read and follow simple instructions
- Follow simple oral instructions
- Recognize numbers
- Understand basic concept of adding and subtracting

Waterloo Catholic School Board also adds the following suggestions:

- Express through writing an bit about themselves
- Write a simple paragraph or journal entry
- Read a paragraph independently

Transition to LBS programs offered by Conestoga College:

- Read and comprehend 1 to 2 pages of text
- Follow instructions
- Write paragraph of 5 to 6 sentences with some accuracy
- Basic numeracy operations, especially multiplication tables
- Communicate orally in English

- 1) The skills and tasks are suggestions, not mandatory requirements.
- 2) In a few cases, the suggested lists contain items that require a higher literacy skill than the minimum LBS level cited by the particular agency for entry. Discussion showed that there is a difference between MINIMUM literacy skills required for a referral and DESIRED or IDEAL literacy skills that will give the student a better chance for success.

- 3) Many students lack the self-management and self-direction skills to work successfully in their new learning setting. Students who are referred to a LBS agency “just meeting or not quite reaching” the required entry levels, but with good interaction skills, the ability to work independently, and a strong motivation, are more likely to succeed than students lacking these skills, but having higher literacy levels.

Agreement # 11 – Assessment Guidelines

The guidelines on the following pages are used to help assess skills and tasks outlined in Agreement #10

- 1) All assessments for LBS training, the assessment task and expected proficiency level are goal-directed, and designed to fit the needs of the individual students.
- 2) The descriptions are guidelines not exit assessment requirements.

Please refer to next 3 pages for the guidelines.

Reading

LEARNING OUTCOME: reading with understanding for various purposes

Description:

Reading and comprehend a paragraph independently: read basic sentences; do independent work (transition to school board LBS programs).

Related LBS levels:

Level 1 & Level 2 (Waterloo Region & Catholic District School Boards)

Level 2 (Wellington Centre for Continuing Education)

Assessment:

- Text has personal relevance to student and/or related to individual's goal.
- Some assistance can be provided.
- Student has a general overall grasp of text; when reading aloud getting some words wrong, or replacing some words, is acceptable.
- Students can "read and retell" – comprehends what he/she has read.
- Student can orally answer simple questions about what he/she has read.
- Students can read silently on own for 10 minutes
- Student takes initiative and moves along to another task, or another part of the same task, after 10-15 minutes if "stuck" and help isn't immediately available.

Description:

Reading and comprehend 1-2 pages of text (transition to Conestoga College LBS programs)

Related LBS levels: Level 2 (Guelph Campus) & Level 3 (Cambridge & Waterloo Campus)

Assessment:

- Student is working at a LBS Level 2 (Guelph), and LBS level 3 (Cambridge & Waterloo) as a minimum requirement.
- Students reads to follow instructions, such as those required to do a multiple choice test or exercise.
- Student demonstrates the ability to learn how to get help to complete a task, rather than simply sitting there.
- Student reads and works independently for approximately an hour.

Writing

LEARNING OUTCOME: Write clearly to express ideas.

Description:

Write a simple paragraph or journal entry: write a group of related sentences on a topic of person interest; express through writing a bit about themselves (transition to school board LBS programs).

Related LBS LEVELS:

Level 1 & level 2 (Waterloo Catholic and region District School Boards)

Level 2 (Wellington Centre for Con. Ed.)

Assessment:

- Student writes 2 or 3 sentences of personal relevance.
- Student completes the writing independently (not transcribed or corrected by a tutor or instructor).
- Writing sample is first draft (and not polished or rewritten final draft).
- Sentences do not have to be “perfect” (or even nearly perfect!).
- More importantly, the student is able to express his or her idea(s) through the writing, and demonstrates the confidence to write independently, or is eager/willing to try, in order to learn.

Description:

Write paragraphs or 5 to 6 sentences in length with some accuracy (transition to Conestoga College Programs).

Related LBS Levels: Level 2 & 3

Assessment:

- Writing is logical; recognizable
- The quality / standard of performance required is linked to the student’s goal, his or her reading and numeracy levels, and self-management and self-direction abilities.
- For example, a student able to read reasonably well and work independently may be successful with lower level writing skills upon entry.

Following Instructions

Learning Outcome: Speak and listen effectively; Read with understanding for various purposes

Description:

Follows simple oral instructions; reads basic instructions; reads simple instructions and processes them (transition to school board LBS programs)

Related LBS levels:

Level 1 & level 2 (Waterloo Catholic and region District School Boards)

Level 2 (Wellington Centre for Con. Ed.)

Assessment:

- Student is comfortable interacting/ following instructions within a group setting.
- Student follows simple instructions, both oral and written.
- Student processes simple instructions from a variety of texts.
- Student comprehends what he/she reads, and can summarize.
- Student is familiar with basic common conventions of instructions in text; i.e. sequential numbering, bold print.

Description:

Follows instructions (transition to Conestoga College LBS programs)

Related LBS Levels: Level 2 & 3

Assessment:

- Student is comfortable interacting / following instructions within a group setting.
- Student is able to apply instructions, both written and oral.
- Student completes the task in an appropriate amount of time.
- Student is able to develop the skill of knowing when to ask questions, and when to reread for clarification.
- Student uses skimming and scanning skills.

Agreement # 12 – Implementation of Agreements

Each agency is responsible to communicate to staff the 12 agreements and encourages and facilitates their implementation.

Performance Indicators:

- ✓ Project READ Literacy Network prints and distributes the agreement to each LBS agency in Waterloo-Wellington.
- ✓ Each agency distributes the agreements to their front-line LBS staff, including assessors, instructors, intake personnel and others whose duties involve related responsibilities.
- ✓ Each agency ensures new LBS staff members receive the agreements and provide explanation as required.
- ✓ Annual training is delivered to front line staff on common understanding of assessment (either Network-wide and/or within an agency).
- ✓ Opportunities are provided for frontline staff across the region to meet and discuss issues of common concern.
- ✓ Frontline staff members are surveyed annually to see if the agreements are being implemented.
- ✓ Info & Referral is a regular agenda item at LSP meetings.