Right from the Start

Five-step Toolkit

NALA

National Adult Literacy Agency
Áisíneacht Náisiúnta Litearthachta do Aosaigh

Literacy Advisory Service
Helping you to enhance your work

Right from the Start
Five-step Toolkit

How to use this toolkit

We have produced this toolkit of forms and checklists as a companion to our main guide *Right from the Start.* The guide describes what it means to be a literacy-friendly organisation, offers best practice guidelines and case studies and outlines a five-step process for your organisation to take to address the needs of adults with literacy difficulties.

When you are ready to use this toolkit, you will be working with a literacy advisor who will guide you through the process and help you to review, develop, adapt and evaluate your:

- policies and procedures,

- communications, and

- staff training.

Each form and checklist is numbered to fit in with each of the five steps in the process. If more than one form is needed for a given step, we add a, b or c to distinguish each of them.

Depending on your organisation's resources, you may decide to use the toolkit for the whole organisation or, if it is more useful, for one department or section at a time. Your literacy advisor will be able to help you with any questions you have. Good luck!

Form 1: Identifying staff to be part of initial literacy briefing group

Consider the range of staff who will help to advance the approach to becoming a literacy-friendly organisation. At what point should they take part in a literacy briefing?

To focus your discussion, ask yourselves:

- Who are the first people your customers contact when they deal with the organisation?

- Who are the first people your customers or partners meet if they visit your premises?

- Who are the people with whom your customers or staff interact if they have a query or a problem?

- Who carries the final responsibility for the quality of the goods or services the organisation provides?

Staff due for literacy briefing	Right away	Later	Not needed until in-house briefing
The team			
Front-line staff who interact with customers			
IT experts who design and administer IT systems			
Supervisors, line managers who organise staff			
Senior managers			
HR staff who handle recruitment, staff appraisal			
Essential services staff who provide maintenance, cleaning, canteen services			
Contract workers and consultants			
Other?			

Form 2a: Record and rating of existing policies and procedures

1. Jot down the policies and procedures for each of your main activities.

2. Based on the good practice guidelines in the main guide, use the 'Rating' row to identify if the policies and procedures are literacy friendly. Write 'yes', 'could be better', 'no' or 'n/a' (not applicable) as needed.

3. Use the 'Comments' box to jot down any further notes, for example any reasons why some policies are better than others or early ideas for improvement.

Customer service activity	Policy	Procedure (including the extent of reading and writing involved)
Initial contact with organisation		
Rating		
Accessing services		
Rating		
Complaints		
Rating		
Other (specify)		
Rating		

Comments – customer activity

Staff activity	Policy	Procedure (including the extent of reading and writing involved)
Recruitment (job specs, application process, advertising)		
Rating		
Consultations		
Rating		
Entitlements and obligations		
Rating		
Other (specify)		
Rating		

Comments – staff activity

Form 2b: Record and rating of how you communicate

1. Jot down how you communicate inside and outside your organisation.

2. Based on the good practice guidelines in the main guide, use the 'Rating' row to identify if the methods of communication are as literacy friendly as possible. Write 'yes', 'could be better', 'no' or 'n/a' (not applicable) as needed.

3. Use the 'Comments' box to jot down any further notes, for example any reasons why some methods are better than others or early ideas for improvement.

Customer service activities	Written only	Written, with images	Face to face	By phone	Online	Other
Initial contact						
Rating						
Making appointments						
Rating						
Directions and instructions						
Rating						
Essential information (entitlements, legal notices)						
Rating						

Customer service activities	Written only	Written, with images	Face to face	By phone	Online	Other
Dealing with complaints						
Rating						
Surveys and feedback						
Rating						
Other (specify)						
Rating						

Comments – customer activity

Staffing activities	Written only	Written, with supporting images	Face to face	By phone	Online
Advertising vacancies					
Rating					
Feedback and appraisals					
Rating					
Surveys					
Rating					
Key policies and employment information					
Rating					
Grievance and disciplinary procedures					
Rating					

Staffing activities	Written only	Written, with supporting images	Face to face	By phone	Online
Instructions (health and safety notices, job procedures and so on)					
Rating					
Other (specify)					
Rating					

Comments – staffing activity

Form 2c: Record and rating of existing staff training and development

1. Jot down how you organise and provide training for your staff.

2. Based on the good practice guidelines in the main guide, use the 'Rating' row to identify if the your approach to training is as literacy friendly as possible. Write 'yes', 'could be better', 'no' or 'n/a' (not applicable) as needed.

3. Use the 'Comments' box to jot down any further notes, for example any reasons why some training methods are better than others or early ideas for improvement.

Training activity	When it happens	Scope (range of topics and range of staff)	Method
Induction			
Rating			
Literacy awareness training for key staff			
Rating			
Dedicated literacy tuition			
Rating			
Training needs analysis			
Rating			
Integrating literacy into training design			
Rating			

Training activity	When it happens	Scope (range of topics and range of staff)	Method
Integrating literacy into training delivery			
Rating			
Assessment			
Rating			
Evaluating impact of training			
Rating			
Other (specify)			
Rating			
Comments – training activities			

Form 3a: Action plans by area

In the left-hand column, fill in the area that you are addressing: policies and procedures, communications or training and development. It may also help to further specify whether the processes apply to customer service or to staff. Once again, you may choose to devise action plans across the whole organisation or for each section of the organisation in turn to start off.

Area	Actions	Person responsible	To be done by (when)	Monitoring by (method, date)
	1			
	2			
	3			
	4			
	5			
	6			
	7			
	8			

Form 3b: Indicators of progress

Identify the area of activity in the first row and then list the actions and signs of progress for each one.

Area of activity:		
Actions and steps	Indicators of progress	Goal(s) of actions

Sample completed form

Area of activity: Policies and procedures - staffing		
Actions and steps	Indicators of achievement	Goal(s) of actions
Review and amend job descriptions for new and promoted posts so that they are easy to understand and list only essential literacy and other requirements for the role		To receive applications that are completed correctly To receive a wider range of applications for positions
1. Gather drafts of all forthcoming job descriptions from Dept heads – EMcS gets this.	A written list of jobs plus job description is supplied by all Dept heads by due date.	
2. Audit each against plain English and integrating literacy guidelines.	EMcS supplies redrafted version to team meeting by due date.	
3. Re-draft where needed and circulate to Dept heads for comment.	Comments received from all Dept heads.	
4. Revise and produce final versions.	Final versions for all new jobs produced before next recruitment drive on (date).	

Form 4a: Checklist for plain English documents

This checklist offers a quick way for you to review a letter, leaflet, booklet or short report to see whether it uses plain English and is easy to follow. Not all questions will apply to every document, but try to answer 'yes' as much as possible to the questions that do apply.

Language, punctuation and grammar	Yes	No
1. Does the document use 'you' and 'we', where possible?		
2. Does it use the active voice most of the time?		
3. Does it keep technical terms and abbreviations to a minimum?		
4. Does it define any necessary terms and abbreviations clearly?		
5. Does it keep 'corporate jargon' to a minimum?		
6. Does it avoid Latin and French phrases and Latin abbreviations?		
7. Does it use the same term for the same concept throughout?		
8. Does it have an average of 15 to 20 words in each sentence?		
9. Does it use the simplest verb tense possible?		
10. Does it avoid abstract nouns where possible?		
11. Does it use correct punctuation?		
12. Do nouns and verbs agree (singular noun with singular verb, for example)?		
Structure		
13. Does it organise information according to the reader's needs and interests?		
14. Does it use informative headings or questions to break up text?		
15. Does it include a natural flow from one point to the next?		
16. Are paragraphs relatively short?		
17. Does it use bullet point lists for detailed or complicated information?		
Page design		
18. Does it avoid underlining, groups of italics and unnecessary capital letters?		
19. Is text in a readable typeface (font), aligned to the left and 1.5 spaced?		
20. Are images, charts or blocks of colour, if any, clear and relevant to the text?		

Form 4b: Checklist for plain English forms

This checklist offers a quick way for you to review a form to see whether it uses clear language and is easy to follow. Not all questions will apply to every document, but try to answer 'yes' as much as possible to the questions that do apply.

Language, punctuation and grammar	Yes	No
1. Does the document use 'you' and 'we', where possible?		
2. Are most questions in the active voice?		
3. Are questions written clearly and unambiguously?		
4. Does the form define any necessary terms and abbreviations clearly?		
5. Does the form avoid Latin and French phrases and Latin abbreviations?		
6. Are questions punctuated correctly?		
7. Do similar questions use similar words and punctuation?		
8. Do questions use the simplest verb tense possible?		
9. Do questions avoid abstract nouns?		
Structure		
10. Does the form include clear instructions at the start?		
11. Are 'official use only' sections, if any, near the end of the form?		
12. Does the form ask questions in a logical order?		
13. Does it avoid unnecessary or repeated questions?		
14. Does it group similar questions together under useful headings?		
15. Does it keep numbering as simple as possible?		
Page design		
16. Does it avoid underlining, groups of italics and unnecessary capital letters?		
17. Does the form use a typeface (font) that is easy to read?		
18. Is it clear where to answer?		
19. Is there enough space to answer?		
20. Does the form use tick-the-box questions where possible?		

Form 4c: Audit for literacy awareness training

Send this form to relevant staff – and give staff the opportunity to answer verbally if necessary – to identify how best to deliver literacy awareness training. Each person should answer only for themselves, ticking under a, b, c or d after each question.

a = I know a lot about this
b = I don't know much and would like to learn more.
c = I don't know much and would like to delegate this to a colleague.
d = This is not relevant for my work.

Literacy and numeracy topic	a	b	c	d
General knowledge of literacy and numeracy issues				
1. Overall awareness of literacy issues – causes, facts, figures, effects				
2. Knowledge of literacy and numeracy in the wider environment				
3. How to notice if someone may have literacy difficulty				
4. How to respond if someone does have a literacy difficulty				
Specific knowledge and skill in literacy issues				
5. Identifying literacy and numeracy in the general training or working environment				
6. Identifying literacy and numeracy demands of particular jobs				
7. Practical tips for an initial interview or meeting to help identify if a new recruit has a literacy or numeracy need				
Taking concrete action to support literacy development				
9. What action to take if a literacy or numeracy difficulty is identified				
10. Different ways of working on literacy and numeracy and who provides the service				
11. Tips on making the work environment literacy-friendly				
12. How to make documents and events more literacy friendly				
13. Building literacy and numeracy work into induction				
14. Building literacy and numeracy work into goal-setting				
15. Integrating literacy into training design and delivery				
16. Encouraging a person to take action to work on their literacy				
17. Organising access to literacy tuition				
18. Building a relationship with the local adult literacy service				
Supporting progression				
19. Monitoring a person's progress in literacy and numeracy				
20. Exploring the practicalities of literacy issues in job-seeking and further training				
Total				

Form 4d: Setting up a workplace basic education programme

The following checklist is based on elements of Irish and international best practice in workplace basic education programmes.

	Yes	No
Development of WBE programme		
1. Did you use a partnership approach, involving employers, employees, trade union reps and literacy tutors?		
2. Did you appoint an existing staff member as a liason person in the workplace?		
3. Did you appoint a co-ordinator to promote and recruit participants?		
4. Did you use a range of methods to promote the programme?		
5. Were you aware of the sensitivities that employees can feel?		
6. Did you ensure confidentiality is maintained?		
7. Is all participation voluntary?		
8. Is the programme integrated into the organisation's overall training and development programme?		
9. Will the course take place on-site?		
10. Will the course take place on work time?		
Design of course		
11. Are there agreed learning objectives?		
12. Do these take account of the particular needs of participants?		
13. Did you consider the number of tuition hours based on the level and needs of each participant?		
14. Are class sizes agreed based on participants' abilities and needs?		
15. Are there no more than seven to eight people in a group?		
16. Was the initial assessment flexible, informal and appreciative of achievements? Were a variety of methods used?		
Delivery of course		
17. Was the curriculum negotiated with relevant stakeholders?		
18. Is the course delivered using many methods and approaches?		
19. Is the delivery flexible?		
20. Are extra literacy supports available to participants?		
21. Are you offering accreditation (should be optional and voluntary)?		
22. Does the course allow for progression?		
Evaluation		
23. Has the course got built-in ongoing feedback from participants?		
24. Will you evaluate it?		

Form 4e: Integrating literacy into training

This checklist offers a quick way for you to review whether your staff training and development across all skills and areas takes effective account of literacy issues.

	Yes	No
Recruitment		
1. Are the documents you use to advertise staff training in plain English and laid out in an easy-to-read format?		
2. Does course information state that difficulties with reading and writing will not prevent people from taking part?		
Analysis of all training and development courses		
3. Do you identify what specific types of reading, writing and language or numeracy skills are involved in courses so that you can design or organise staff training and development that includes adults with literacy difficulties?		
Course design, delivery and evaluation		
4. Are courses designed to include a range of teaching and learning methods, aside from text-based?		
5. Are courses designed so that any printed materials are clearly laid out and are in easy-to-read language and format?		
6. Does the course design aim to reduce literacy barriers to taking part in and learning on the course?		
7. If appropriate, does the course design include activities that build participants' confidence and skill in literacy in the context of the main course topic?		
8. Do course delivery plans include methods that specifically address the language, literacy and numeracy issues identified in the earlier course analysis?		
9. Can participants evaluate the training using a range of methods, not just forms and writing?		
10. Does evaluation invite participants to comment on and give suggestions about any reading and writing activities and materials involved in the course?		
Training for trainers		
11. Are trainers and facilitators of staff development courses themselves trained in how to design, deliver and evaluate programmes that take account of literacy issues?		

Form 5a: Monitoring sheet by area

Use this form to keep track of progress in achieving the actions. Depending on the range of activities, you may decide to use one form for the whole organisation for each unit in turn.

Area of activity:				
Action	Indicators of progress	Started	In progress	Done

Form 5b: Assessment of how well the actions are achieving the intended goals

Use this form to assess how well each of your planned actions is meeting its intended result(s).

Area of activity:						
Action	Goal	Yes	Mostly	A little	No	Comments