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Report **December 2002**



Success by Design What Works in Workforce Development

EDUCATION AND LEARNING



The Conference Board of Canada Report to The Association of Joint Labor-Management Educational Programs
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Success by Design: What Works in Workforce Development
by *Michael Bloom and Alison Campbell*

About The Conference Board of Canada

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Preface

Joint workplace education programs harness the power of collaboration between unions and management to produce exceptional training results that benefit everyone involved. They are successful by design—not by accident. This study looks at successful practices in joint labor/management workplace education programs in the United States. The report highlights the benefits of these collaborative training programs and explains how and why they are successful.

Our research included in-depth study of nine training cohorts in the health care, information technology/telecommunications, and hospitality sectors. As people and organizations start (or improve) their own joint training programs, they can use this report to identify and articulate what outcomes, benefits, and impacts they stand to gain. A blueprint for action, based on 12 key program design elements, is presented, along with options for developing and delivering similar initiatives.

The research for this report was funded by The Association of Joint Labor-Management Education Programs. **The Association of Joint Labor-Management Educational Programs** is a 501(c) 3 non-profit organization. Association members are co-operative ventures between leading unions and employers. They address the educational needs of more than 1,000,000 organized workers in 11 labor unions and over 400 employers in a variety of industries. Union members participating in these programs seek a range of opportunities, from basic skills to job training to post-secondary degrees.

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Success by Design

What Works in Workforce Development

Workplace education programs, jointly developed and managed by employers and unions, are successful by design. By drawing from a core group of a dozen design elements, Joint Training Program (JTP) developers are able to design workplace education programs, whose structures and processes allow large numbers of workers to gain skills that yield personal benefits for them in the workplace. The study's main objective is to identify and showcase what makes Joint Training Programs successful, especially the key design elements that contribute to positive outcomes. It does this by studying JTPs that have already achieved recognized, demonstrated success, and by investigating the underpinnings of that achievement.

Success by Design highlights the benefits of JTPs and explains how and why the design elements make them successful, based on the in-depth study of nine training

cohorts in the health care, information technology/telecommunications, and hospitality sectors. As people and organizations start or improve their own Joint Training Programs, they can use this report to identify and articulate what outcomes, benefits, and impacts they stand to gain.

SKILL GAINS AND BENEFITS

Joint Training Programs (JTPs) give workers, employers, and unions a wide range of benefits due to the skills gained through study and training. Worker skill gains translate into major performance gains for their employers which, in turn, increase profitability. The same programs provide unions with significant benefits stemming from their members' higher job satisfaction. Their perception is that most of the credit for the Joint Training Programs they like so much is owed to their unions (see tables 1, 2 and 3).

<p>Table 1 Employers' Perspective: Current Skill Gains and Benefits of JTPs</p> <hr/> <p>Skill Gains</p> <ul style="list-style-type: none">• improved literacy skills• improved job-specific skills• improved communications skills• better personal management• increased self-confidence <hr/> <p>Benefits</p> <ul style="list-style-type: none">• improved customer service• improved quality of work• increased productivity• fewer errors• better communication with co-workers and managers• better understanding of job tasks• greater appreciation of learning <p>Source: The Conference Board of Canada.</p>
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<p>Table 2 Union Perspective: Current Skill Gains and Benefits of JTPs</p> <hr/> <p>Skill Gains</p> <ul style="list-style-type: none">• improved literacy skills• improved communications skills• increased self-confidence• improved decision-making• greater adaptability <hr/> <p>Benefits</p> <ul style="list-style-type: none">• improved quality of work• improved attitude towards union• better understanding of union activities• increased application of skills in union activities• better communication with other members• greater appreciation of learning <p>Source: The Conference Board of Canada.</p>
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<p>Table 3 Workers' Perspective: Current Skill Gains and Benefits of JTPs</p> <hr/> <p>Skill Gains</p> <ul style="list-style-type: none">• improved literacy skills• improved job-specific skills• improved communications skills• better personal management• improved decision-making• greater adaptability• increased self-confidence <hr/> <p>Benefits</p> <ul style="list-style-type: none">• improved quality of work• increased productivity• fewer errors• better communication with co-workers and managers• better understanding of job tasks• greater appreciation of learning <p>Source: The Conference Board of Canada.</p>
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PROGRAM DESIGN ELEMENTS— KEY SUCCESS FACTORS

The program design elements are the most important dimension for understanding why joint labor–management training programs are successful. For employers and unions, they are also the keys to building or replicating Joint Training Programs in their own workplaces. *Success by Design* explores in-depth the practices of joint labor–management models of workforce development through training.

The 12 key design elements that contribute most to the success of JTPs were identified in this study:

1. Continuous process of balanced, collaborative consultation between labor and management, based on concurrence developed through collective bargaining
2. Learning needs analysis during program development process
3. Career/educational planning services available (career ladders)
4. Access to continuing educational opportunities
5. Access to financial assistance for education and training
6. Program marketing and promotion
7. Measuring and evaluating program effectiveness
8. Dual training focus: meeting worker and workplace needs
9. Voluntary participation of workers, whenever possible
10. Worker involvement in designing, implementing, and evaluating training
11. Multiple learning strategies for worker-students
12. Specific criteria for selecting and evaluating educational and training providers

Joint Training Program Profiles

The Conference Board studied the nature and impact of workplace education programs developed and delivered by Joint Training Programs in three sectors: health care, information technology/telecommunications, and hospitality. Over 60 employer, worker, union, and trainer interviews were conducted, covering three Joint Training Programs:

- The Alliance for Employee Growth and Development (The Alliance), New Jersey
- The Hospital League/1199 Training and Upgrading Fund (1199 TUF), New York
- The Culinary Training Academy (CTA), Nevada

IMPORTANCE OF “JOINTNESS”

The “joint” nature of these programs is crucial to success. When employers provide training opportunities and workers take part in them, it is often a demonstration that both parties want and expect the employer–worker relationship to continue, and that they both use the training as an incentive to continue the working relationship.¹ By partnering with employers to provide training, unions show their interest in developing positive relationships to help their members. In the joint labor–management training model context, both management and union leaders take responsibility for leading the processes of change, communicating with worker-members, and maintaining the integrity of the partnership.²

PROGRAM DEVELOPMENT PROCESS

To help employers, unions, and workers build the important design elements into their own programs or replicate successful models, this report provides a Program Development Process (PDP) for developing and delivering effective Joint Training Programs. The Program Development Process (PDP) is intended to help management and unions work effectively together, at every stage in the development of their Joint Training Programs. It shows program developers how they can apply the 12 key design elements to their existing planning processes, and helps them to get on the right track if they are entering the start-up phase.

CONCLUSIONS

Joint Training Programs harness the power of collaboration between unions and management to produce exceptional training results. When using the full set of 12 design elements, JTPs can simultaneously build workforce capacity to meet employers’ needs and improve the performance and prospects of individual workers, to their benefit, and to the benefit of the unions to which they belong.

While there are many successful Joint Training Programs already in place in the United States and elsewhere, improvements can always be made, and effective practices shared with others. The report’s Program Development Process builds on the successes already achieved by JTPs, by providing a blueprint for action based on the 12 design elements.

1 Douglas Kruse and Joseph Blasi, *The New Employee/Employer Relationship* (Washington, DC: The Aspen Institute Domestic Strategy Group, 1998). www.aspeninstitute.org/dsg/dsg/_meeting_workplace98_new.html [accessed August 15].

2 David Kusnet, “Rewiring Quality: How a Major Manufacturing Union Promotes High Performance Workplaces” in *Workforce Development and the New Unions*, Ed. Penn Kemble (Washington, DC: New Economy Information Service, 2002), pp. 99-113.

Issues and Context

Workplace education programs, jointly developed and managed by employers and unions, are successful by design. By drawing from a core group of a dozen design elements, Joint Training Program (JTP) developers are able to design workplace education programs whose structures and processes allow large numbers of workers to gain skills that yield personal benefits for them in the workplace. Their skill gains translate into major performance gains for their employers which, in turn, increase profitability. These same programs provide unions with significant benefits stemming from their members' higher job satisfaction. Their perception is that the larger part of the credit for the Joint Training Programs that they like so much is owed to their unions. The most important benefits of JTPs for employers, workers, and their unions are presented in Chapter 3.

Many reports have been written about workplace education, but few of them deal directly with the issue of joint labor–management educational programs. Yet, the “joint” nature of these programs warrants close study because of the consequences of the unusually close relationship between labor and management. When employers provide training opportunities and workers take part in them, it is often a demonstration that both parties want and expect the employer–worker relationship to continue, and that they both use the training as an incentive to continue the working relationship.¹ By partnering with employers to provide training to workers, unions show their interest in developing positive relationships to help their members. In the joint labor–management training model context, both management and union leaders take responsibility for leading the processes of change, communicating with worker-members, and maintaining the integrity of the partnership.²

Success by Design explores in-depth the practices of joint labor–management models of workforce development through training. It asks, in particular, “What elements in the design and structuring of the programs are crucial to their success?” The study’s main objective is to identify and showcase what makes Joint Training Programs successful, especially the key design elements that contribute to positive outcomes. It does this by studying JTPs that have already achieved recognized, demonstrated success and investigating the underpinnings of their achievement. The key design elements that contribute most to the success of JTPs are presented in chapters 5 and 6.

Employers, government officials, union representatives, and workers may wish to build these important design elements into their own programs, or replicate the successful models whose proven track records of results are examined in this study. To help them move forward, this report also presents a number of options for action which promote the development and delivery of effective Joint Training Programs.

OBJECTIVES

This report seeks to articulate the benefits and impacts of joint labor–management educational programs by analyzing nine training cohorts within three major Joint Training Programs. Funded by the United States Department of Labor, this study is a part of a broader study conducted by The Conference Board of Canada and the American Society for Training & Development (ASTD), in partnership with The Association of Joint Labor–management Educational Programs.

In the 16-month-long study, the investment strategies, principal design elements of workplace training and education delivery systems, learning and workplace outcomes, and the resulting economic, organizational, and individual benefits to employers, unions, and workers in a cross-section of industries were examined,

using a multifaceted approach. The Conference Board's research consisted of detailed, in-depth interviews with nine training cohorts from joint labor–management educational programs in the health care, information technology/telecommunications, and hospitality sectors. ASTD's portion of the study consisted of a comprehensive survey conducted with over 20 joint labor–management educational programs, representing a cross-section of industries and public sector organizations. Both the Conference Board and the ASTD supplemented their respective research with a review of the existing research and literature in the field of workforce development, particularly with regard to the impact of joint labor–management programs.

Success by Design summarizes the results of the Conference Board's research. Specifically, it:

- identifies and articulates the outcomes, benefits, and impacts of joint labor–management educational programs;
- identifies and discusses the significance of key program design elements;
- identifies and articulates the key program success factors among the design elements;
- presents models of effective Joint Training Programs; and
- articulates options for action to promote the development and delivery of effective Joint Training Programs.

PREVIOUS RESEARCH

The benefits and impacts of workplace education have been widely discussed, but rarely dissected. This is likely due, in part, to the general difficulty in measuring the impacts of training in a workplace setting. While it is clear that there are direct and indirect benefits due to workplace education programs, there are very few consistent, or representative, measures over time of formal or informal worker training impacts.³ JTPs share the common issues facing all training organizations and systems. The need for measurement of training impacts on workplace performance is generally accepted, although easy-to-use, universal measurement methodologies are scarce. Some models of return on investment (ROI) measures for training are gaining acceptance by employers, but slowly. Developing an ROI process is challenging, and is hampered by the

complexity and misunderstandings surrounding some models, which inhibit employers and human resource practitioners from making use of them.⁴

TRAINING FEATURES

JTPs allow workers to participate in a wide range of training opportunities, including basic skills upgrading and General Educational Development (GED) preparation, job-specific training, and post-secondary level educational programs. The importance of this has been noted in earlier studies.⁵ They point out that jointly sponsored worker training, with its broad range of education and training programs, provides an important bridge over the gap between government-sponsored training (which is typically directed toward disadvantaged groups) and employer-sponsored training (which is usually directed toward highly skilled technical or managerial employees).⁶

Another important aspect of JTPs that has been widely observed, although rarely analyzed, is the flexible nature of the programs. This flexibility, which permits changes to training program offerings, according to the needs of the employers, employees, and unions involved, allows workers to choose a training course of study that most interests them or is most conducive to their career path. The ability to create a tight personal focus tends to motivate workers to stay the course and complete their training. The flexible nature of JTPs also allows for a learning environment in the workplace that can more easily adapt to rapidly shifting markets.⁷

HEALTH CARE SECTOR

Continuous changes in the health care industry, including technological advances and changing population demographics, demand that workers similarly upgrade their skills. In addition to providing medical treatment to patients, hospitals and other health care facilities deliver a complex array of information and services. Accurate and efficient communications and data recording and retrieval systems are vital to the organizations' ability to deliver these services to patients, medical and research staff, members of the community, and other agencies. In a recent study of the information and technology needs of hospital workers in New York City, both departmental directors and staff agreed that basic computer literacy was essential for accessing the computerized information systems typically used in their workplaces. The workers also

believed that additional training about computer systems or cross-training opportunities would help their overall job performance even more.⁸ Improving the information and technology skills of workers in health care who deal with records management and finances can significantly raise the efficiency and operations levels of their organizations.

In a report to New York's Hospital League/1199 Training and Upgrading Fund (1199 TUF) on the effects of subacute care on health care occupations, it was noted that different aspects of the health care system, including reimbursement mechanisms, directly affect the provision of care.⁹ It pointed to the need to provide non-medical, as well as medical, training in the health care field, as a key to the successful and efficient treatment of patients. 1199 TUF provides a variety of job-specific skills upgrading opportunities, as well as educational and career path counselling to eligible workers.¹⁰ A recent study of the impacts of a communications training program, given to health care workers through 1199 TUF, concluded that the training contributed to workers' personal and professional well-being. The newly learned communications skills improved the workers' ability to cope with stressful situations in their jobs and also gave them important skills with which to manage their professional relationships.¹¹ Skills upgrading opportunities that assist workers in their jobs and in their careers, as provided through JTPs, benefit both workers and their industry by raising the bar on health care provision.

HOSPITALITY SECTOR

The hospitality industry has a long-held reputation for having large volumes of low-wage, front-line jobs, leading to frequent staff turnover. One method used increasingly by hospitality employers to stem the tide of a relatively high staff turnover rate is to provide training and career opportunities. Job-relevant skills upgrading and the availability of hospitality industry job opportunities combine to make powerful incentives for workers to enroll in training. As in the case of the Culinary Training Academy (CTA) of Las Vegas, Nevada, Joint Training Programs in the hospitality sector typically arise from a partnership between one union and several employers.¹² Several major resort

hotels in Las Vegas often send recruitment personnel directly to the graduation ceremonies of the Culinary Training Academy. Prospective employers' confidence in the training provided by the CTA is a positive sign that the curriculum combination of classroom work and hands-on experience works well.¹³ From the employer's point of view, a worker who invests his or her own time and effort in training demonstrates commitment to the hospitality industry, and is more likely to want to make hospitality a career with an employing organization.¹⁴

TECHNOLOGY/TELECOMMUNICATIONS SECTOR

The technology and telecommunications sector has been experiencing significant bouts of downsizing in recent years, at the same time as the nature of the jobs in the sector has been changing rapidly. This has created a major demand for training that can prepare workers for new or changed jobs in their company, and also prepare them for finding new employment outside their company, when necessary.¹⁵ The research indicates that, from the employee perspective, JTPs are doing a good job of helping them gain skills in the face of often challenging work conditions, and in finding alternative employment as circumstances dictate.

Creating buy-in from first-line supervisors and managers is an important part of JTP success. Managers, whether consciously or not, give direct and indirect messages to workers about the value and usefulness of training. While many managers are supportive of JTPs, support is not universal. For example, in a study of stakeholder support for the Alliance, only half (54 per cent) of the AT&T managers surveyed felt that the Alliance had a good reputation, and less than half felt that the Alliance had contributed to the overall strengthening of the AT&T workforce. However, this may be due, at least in part, to a lack of effective publicity on the part of the JTP, as less than one-third of the managers perceived the Alliance to be well publicized.¹⁶ If managers have negative views of JTPs, they may influence worker views of taking part in training. JTPs should be aware that managers can act as filters, through which workers learn about and judge the benefits and impacts of training.

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- 1 Douglas Kruse and Joseph Blasi, *The New Employee/Employer Relationship* (Washington, DC: The Aspen Institute Domestic Strategy Group, 1998). www.aspeninstitute.org/dsg/dsg/_meeting_workplace98_new.html [accessed August 15].
 - 2 David Kusnet, "Revving up Quality: How a Major Manufacturing Union Promotes High Performance Workplaces" in *Workforce Development and the New Unions*, Ed. Penn Kemble (Washington DC: New Economy Information Service, 2002), pp. 99-113.
 - 3 Douglas Kruse and Joseph Blasi, *The New Employee/Employer Relationship*.
 - 4 Jack J. Phillips, *Return on Investment in Training and Performance Improvement Programs* (Birmingham, Alabama: PRO Press, 1997), p. 2.
 - 5 Beth Rogers, "Partnering to Train the Next Generation of Electrical Workers" in *Workforce Development and the New Unionism*, Ed. Penn Kemble (Washington, DC: New Economy Information Service, 2002), pp. 55-70. Also appears in *Pathways to the Future: An Evaluation, Council for Adult and Experiential Learning*, (Prepared for Communication Workers of America and US WEST Communications), 1998.
 - 6 C. Jeffrey Waddoups, "Union-Management Training Partnerships in the Hotel Industry: Las Vegas and San Francisco" in *Workforce Development and the New Unionism*, pp. 115-131.
 - 7 Arturo L. Tolentino, *Labor-Management Cooperation for Productivity and Competitiveness* (International Labor Organization, 2000). <http://www.ilo.org/public/english/employment/ent/mandev/publ/pakistan.htm> [accessed September 6].
 - 8 *I.T. in the Workplace: The Impact of Information Systems Technology on the Education and Training Needs of Hospital Workers in New York City* (New York: The Center for Health Workforce Studies, 2001), (Prepared for The Local 1199 Hospital League/Health Care Industry Planning and Placement Fund, Inc.), p. 6.
 - 9 *The Effects of Subacute Care on Health Care Occupations* (New York: City University of New York Graduate School and University Center, 2000), (Prepared for Hospital League/1199 Training and Upgrading Fund), p. 3.
 - 10 *Hospital League/1199 Training and Upgrading Fund Summary Plan Description*, January, 2000, p. 9.
 - 11 *The Impact of Communication Skills Training: An Evaluation* (New York: City University of New York Graduate School and University Center, 2000), (Prepared for Hospital League/1199 Training and Upgrading Fund), p. 2.
 - 12 "Hospitality on the High Road," Working for America Institute. 2002b. <http://www.workingforamerica.org/journals/journals3-2/journal3-2-17.html> [accessed August 30].
 - 13 C. Jeffrey Waddoups, "Union-Management Training Partnerships in the Hotel Industry: Las Vegas and San Francisco," pp. 115-131.
 - 14 "Prep Schools: How Hotel Education Programs are Addressing the Industry's Needs," *Lodging News*, March 2000. http://www.lodgingnews.com/lodgingmag/2000_03/2000_03-02.asp?zone=3 [accessed September 3].
 - 15 *Alliance Participant Survey: AT&T Employees*, (Prepared for the Alliance), (Matters of Fact Inc., 2000), pp. 25-27.
 - 16 *Stakeholder Support for the Alliance: Findings from a Survey of AT&T Managers and CWA and IBEW Local Union Leaders*, (Prepared for the Alliance), (Abt Associates Inc., 1996), pp. 5, 34, 36, 37, 39.

Joint Program Profiles

The Conference Board’s qualitative research examined in detail the nature and impact of workplace education programs developed and delivered by the joint labor–management programs in three sectors: health care, information technology/telecommunications, and hospitality. Altogether, over 60 employers, workers, union representatives, instructors, and joint committee field representatives from the three sectors, involved in nine programs, were interviewed. In-depth telephone interviews were carried out and companion written questionnaires were completed. The interviewees were individuals who were either responsible for developing and delivering the programs, or who successfully took part in them. The Joint Training Programs studied include The Alliance for Employee Growth and Development (The Alliance), a national program headquartered in New Jersey; The Hospital League/1199 Training and Upgrading Fund (1199 TUF) in New York; and The Culinary Training Academy, based in Las Vegas, Nevada.

THE ALLIANCE FOR EMPLOYEE GROWTH AND DEVELOPMENT (THE ALLIANCE)

Formed in 1986, The Alliance is a joint labor–management venture that provides training and educational opportunities to thousands of union-represented employees at AT&T, Avaya, Lucent, and other company work sites across the United States. Funded almost entirely by its core stakeholders, The Alliance is an independent non-profit organization that delivers a variety of programs to active and displaced workers, individually and in group settings. Conceived to enhance worker employability through continuous learning, The Alliance now provides over a million hours of educational opportunities and career support to more than 30,000 represented employees each year.

Funded through the collective bargaining process of AT&T, Avaya, the Communications Workers of America (CWA), the International Brotherhood of

Electrical Workers (IBEW), Lucent Technologies, and others, The Alliance embodies an organizational structure that fosters collaboration between labor and management leaders, which facilitates identification of training needs that really connect to jobs. As a result, Alliance training initiatives provide powerful results for both the unions and companies, by offering training that employees can use right away in their changing jobs—and take with them to other workplaces.

Training Programs Studied:

The Alliance

1. Change Management
 2. Business Writing for E-mail
 3. Computer Software Certification
-

The Alliance is responsive to its stakeholder companies and unions, who are transforming themselves to meet the needs of shifting products, services, competition, political realities, and constant changes for their growth and survival. To this end, it works with industry and stakeholder partners to anticipate and deliver emerging skill sets.

In addition, The Alliance seeks to build skills and to help participants stay current with their evolving jobs. The Alliance fulfills its mission “one person at a time” through programs that motivate, educate, and build longer-term employability. This Joint Program supports individual efforts to develop career and personal growth, and to enhance employability through continuous learning experiences. The success of these individual efforts is enhanced through the co-operative activities of The Alliance and its partners: AT&T, Avaya, CWA, IBEW, Lucent Technologies, and more recently, several other employers.

Table 1
Alliance Statistics: Oct. 1, 2000–Sept. 30, 2001

	Composite	AT&T	Lucent	Avaya	Other
Individuals	26,850	16,587	8,126	1,861	276
Participation rate	42%	48%	39%	23%	–
Enrollments	81,081	51,751	22,725	5,811	794
Enrollments per participant	3.0	3.1	2.8	3.1	2.9
Training hours	1,103,531	661,726	350,236	83,268	8,301
Training hours per individual	41	40	43	45	30

Source: *Annual Report*, The Alliance for Employee Growth and Development, Inc. (2001).

THE HOSPITAL LEAGUE/1199 TRAINING AND UPGRADING FUND (1199 TUF)

The Hospital League-SEIU 1199 Employment, Training and Job Security Program (ETJSP) is one of the largest and oldest sector-based labor–management partnerships in the nation, covering more than 350 employers and 125,000 health care workers in the New York City region. The Hospital League/1199 Training and Upgrading Fund (1199 TUF) is a multi-employer, employee benefit trust fund.

Training Programs Studied:

1199 TUF

1. Billing and Coding
2. Physician’s Assistant
3. Licensed Practical Nurse

It was created in 1969 to give members of the workforce opportunities to “better themselves,” and to strengthen New York City’s health care system. 1199 TUF provides educational benefits to eligible employees in the health care and human services industries, according to collective bargaining agreements entered into between 1199 National Health and Human Services Employee Union (1199), and the League of Voluntary Hospitals and Homes of New York. A variety of educational and training programs in several formats and settings are offered through the 1199 TUF.

The 1199 TUF promotes its worker-centered educational and training system as a “Continuum of Learning.” The Training and Upgrading Fund offers eligible employees a variety of education, training, and counselling programs and services. All programs are

designed to meet the needs of the membership and to create opportunities for career advancement. Through the Training and Upgrading Fund programs, employees can learn new skills for the jobs they have now, and train for the jobs they would like to have in the future. Counselling services provide guidance to employees as they make decisions about their career and training paths. The training programs are intended to help employees move forward and to upgrade to new jobs.

Training programs given through 1199 TUF range from adult education courses, such as GED, ESL, and college preparation, to degree programs at local accredited colleges and universities, such as Licensed Practical Nurse, Registered Nurse, and Physician’s Assistant.

New training programs are offered to 1199 members through the Training and Upgrading Fund when:

- the Trustees approve the program, then set aside a specific amount of money in the budget for that program; and
- the Fund Administrator determines where the classes will be held, what the requirements of the program will be, how many students will participate, as well as which students are eligible and are selected to participate.

THE CULINARY TRAINING ACADEMY

The Culinary Training Academy (CTA) is a single-union, multi-employer, labor–management partnership that covers nearly 50,000 unionized workers in Las Vegas. The Academy first opened its doors in 1993; by 1999 it had graduated more than 13,000 workers. The CTA is the largest provider of occupational training in Nevada. The Culinary Union and local casino companies established the training center to serve

the employment needs of the casino industry and assist Las Vegas workers through education and job skills training.

Training Programs Studied:

Culinary Training Academy

- 1. Housekeeping**
 - 2. Wine Servers**
 - 3. Pantry Cooks**
-

The CTA is the main route by which employers find “work-ready” employees. It is also the vehicle through which entry-level workers and immigrants begin to acquire the skills needed to move up the ladder in the fast-paced hospitality industries. They also acquire a practical appreciation of union-provided benefits, such as training. The goals of the program include the following:

- pre-employment training for new workers;
- upgrade training for incumbent workers; and
- recognition by employers as a resource for trained, skilled, and work-ready employees.

Training is offered to assist employees in becoming more marketable and knowledgeable about jobs in the hospitality and gaming industries. Academy training

counts as work experience with potential employers, giving participants a competitive advantage in the job market. The Culinary Training Academy offers classes for workers who are looking for positions, but do not have the required job skills or work experience. Graduates of beginning job skills classes are given credit by the Culinary Union and the hotels for acceptable work experience, equal to one year of on-the-job experience.

Improving or upgrading their skills allows participants to better position themselves for advancement or promotional opportunities. Upgrade classes in higher-rated job classifications are available for anyone seeking advanced training to prepare for job bidding or promotion. An example of this would be a cook’s helper taking a fry cook class, or a guest room attendant taking a pantry class.

Class fees at the Culinary Training Academy are waived for employees of participating hotels and those who are culinary classified employees. There is a very high demand for graduates of the CTA, and several hotels send representatives to CTA graduation ceremonies in order to recruit graduates directly. Classes in English as a Second Language (ESL) are also offered.

CHAPTER 3

Skill Gains and Benefits

BENEFITS OF WORKPLACE EDUCATION PROGRAMS

Employers, workers, and unions gain higher profits, increased income, higher membership, and a host of other benefits from a broad range of workplace education programs, according to The Conference Board's 1999 report *Turning Skills into*

Profit: Economic Benefits of Workplace Education Programs.¹ More skilful employees save employers time and money, and improve performance and productivity. Other benefits include reduced error rates, a better health and safety record, reduced waste in production of goods and services, and increased customer and employee retention. These benefits translate into financial savings, productivity gains, and higher profits. On top of all that, employees with better basic skills tend to learn more, and faster, when they take job-specific and technical training.

Major benefits of workplace education programs to employers and unions are shown in tables 2 and 3.

Employers who support workplace education programs often enjoy a more conscientious, resourceful, loyal, and dependable workforce as a result. When employees learn that high-quality work is crucial to the success of the organization and to their own job security, they often become more conscientious. Once they become fully aware of what is expected of them and how their efforts fit into the big picture, and then gain the skills to meet those demands, the quality of their work generally rises. Employers often gain, because more skilful employees are more confident employees. Confidence translates into creativity and initiative that, in turn, contributes to the overall performance of the organization.

BENEFITS OF JOINT TRAINING PROGRAMS

Joint Training Programs (JTPs) give individual workers, employers, and unions a wide range of benefits, due to the skills gained through study and training. These benefits echo many of those identified in the Conference Board's study *Turning Skills into Profit: Economic Benefits of Workplace Education Programs* (1999). The specific outcomes (skill gains) and impacts (benefits) that currently result from JTPs are outlined in tables 4 to 6 from the perspective of the participants and funders.

Table 2
Benefits to Employers of Workplace Education Programs

Benefit category	Specific benefits to employers
<i>Bottom-line benefits</i>	<ul style="list-style-type: none"> • increased profitability • better health and safety record • increased customer retention • increased employee retention • enhanced corporate image/employer of choice • improved recruiting
<i>Ability to work smarter and better</i>	<ul style="list-style-type: none"> • increased quality of work • increased output of products and services • reduced time per task • reduced error rate • better health and safety record • reduced wastage in production of products and services
<i>New attitudes</i>	<ul style="list-style-type: none"> • improved capacity to cope with change in the workplace • improved labor–management relations • reduced absenteeism • improved employee morale/self-esteem • positive attitude to lifelong learning • better team performance
<i>Working with others</i>	<ul style="list-style-type: none"> • better team performance • improved effectiveness of supervisory staff • improved understanding of the culture of the group/organization
<i>Basic skills</i>	<ul style="list-style-type: none"> • improved capacity to solve problems • improved capacity to cope with change in the workplace • improved capacity to use new technology • increased capacity to handle on-the-job training
<i>Job-specific skills</i>	<ul style="list-style-type: none"> • more employees participating in job-specific training • improved results in job-specific training • quicker results in job-specific training
<i>Improved human capital</i>	<ul style="list-style-type: none"> • higher success rate in promoting employees within the organization • higher success rate in transferring employees within the organization
<i>Broader benefits</i>	<ul style="list-style-type: none"> • improvements outside the workplace

Source: Michael Bloom and Brenda Lafleur, *Turning Skills into Profit: Economic Benefits of Workplace Education Programs*, Detailed Findings (New York: The Conference Board Inc., 1999), pp. 29, 39, 44, 53, 58, 68, 73, 80.

There is a significant gap between current achievements and potential outcomes and benefits. While already impressive, JTPs could have an even greater impact in the future. Tables 7 to 9 list the range of benefits that are possible in the future.

One way to increase benefits is to increase enrollments. Today, participating workers represent nearly 30 per cent of those eligible for enrollment—a clear indication of the programs’ popularity with workers. However, as some interviewees noted, program impacts could be even greater if more of their fellow workers took part. The solution for achieving enrollments of 50 per cent or more would be to adopt a conscious strategy to increase the number and proportion of workers enrolling in JTPs, while ensuring the quality is maintained, so that each participant would enjoy the same or greater level of skill gain.

“Training has increased my self-confidence in using a computer; now I feel like I am equal to my peers.”

—Student, *The Alliance*

Interviewees report a wide variety of learning gains and other positive impacts from JTPs. Participating workers felt that the programs were generally sensitive to their needs and successfully provided them with significant skill gains that greatly helped them at work. The skill gains include literacy, job-specific skills, communications, and a range of soft skills, including personal management, decision-making, adaptability, and attitudinal changes, as well as self-confidence and a greater understanding of the value of life-long learning and corresponding willingness to learn at work.

“Students learn to react to unexpected situations on instinct.”

—Instructor, *Culinary Training Academy*

First-line supervisors and managers of these workers saw improvements in job performance due to their skill gains. They identified gains, such as better customer

relations, higher work quality, and increased productivity. Managers also stated that trained workers were more likely to be consulted by other workers, and were more highly sought after in the industry. Improved self-confidence and decision-making abilities were not the primary goals of job-specific training programs, but were noticed and appreciated by managers upon workers’ return to their jobs.

Both managers and union representatives reported improvements in labor–management relations due to the increased collaboration and consultation between the two groups in the process of developing and running joint training programs. The opportunity to take part in skills upgrading programs gave worker-students a higher opinion of both their employers and their unions. Again, though, this impact could be greatly increased if more workers took part in training.

Table 3
Benefits to Unions of Workplace Education Programs

Benefit category	Specific benefits to unions
<i>Basic skills</i>	<ul style="list-style-type: none"> improved capacity to cope with change in the workplace improved reading, writing, and numeracy skills improved communications skills improved ability to use new technology improved capacity to solve problems
<i>Job-specific skills</i>	<ul style="list-style-type: none"> more employees participating in job-specific training quicker results in job-specific training improved results in job-specific training
<i>New attitudes</i>	<ul style="list-style-type: none"> improved employee morale/self-esteem increased retention of employees improved capacity to cope with change in the workplace positive attitude to lifelong learning
<i>Working with others</i>	<ul style="list-style-type: none"> improved labor–management relations better team performance improved effectiveness of supervisory staff
<i>Ability to work smarter and better</i>	<ul style="list-style-type: none"> increased output of products and services reduced time per task reduced wastage in production of products and services increased quality of work reduced error rate better health and safety record
<i>Enhanced job opportunities</i>	<ul style="list-style-type: none"> higher success rate in promoting employees within the organization higher success rate in transferring employees within the organization
<i>Broader benefits</i>	<ul style="list-style-type: none"> improvements outside the workplace improved understanding of the culture of the organization improved understanding of the role of the union

Source: Michael Bloom and Brenda Lafleur, *Turning Skills into Profit: Economic Benefits of Workplace Education Programs*, Detailed Findings (New York: The Conference Board Inc., 1999), pp. 114, 117, 119, 121, 124, 126, 128.

“Members use improved note-taking skills to prepare for grievances.”

—Union Representative, The Alliance

CURRENT GAINS AND BENEFITS

Joint Training Programs (JTPs) currently give individual workers, employers, and unions a wide range of benefits due to the skills gained through study and training. The most important skill gains and benefits of JTPs, identified universally by more than 60 employers, workers, and their unions, are indicated in Table 4.

Employers and unions each saw a wider range of current benefits from their own perspectives (see tables 5 and 6).

POTENTIAL GAINS AND BENEFITS

While already impressive, JTPs have the potential to be of greater impact in the future. Employers, workers, and their unions universally agreed that there is a significant gap between current achievements and the potential for skill gains and benefits (see Table 7).

Employers and unions each saw a wider range of potential benefits from their own perspectives (see tables 8 and 9).

Table 4 Current Skill Gains and Benefits of JTPs	
Current skill gains	Current benefits
<ul style="list-style-type: none"> • improved literacy skills • improved communications skills • increased self-confidence 	<ul style="list-style-type: none"> • improved quality of work • better communication with co-workers and managers • greater appreciation of learning
Source: The Conference Board of Canada.	

Table 5 Employers' Perspective: Current Skill Gains and Benefits of JTPs	
Current skill gains	Current benefits
<ul style="list-style-type: none"> • improved literacy skills • improved job-specific skills • improved communications skills • better personal management • increased self-confidence 	<ul style="list-style-type: none"> • improved customer service • improved quality of work • increased productivity • fewer errors • better communication with co-workers and managers • better understanding of job tasks • greater appreciation of learning
Source: The Conference Board of Canada.	

Table 6 Union Perspective: Current Skill Gains and Benefits of JTPs	
Current skill gains	Current benefits
<ul style="list-style-type: none"> • improved literacy skills • improved communications skills • increased self-confidence • improved decision-making • greater adaptability 	<ul style="list-style-type: none"> • improved quality of work • improved attitude towards union • better understanding of union activities • increased application of skills in union activities • better communication with other members • greater appreciation of learning
Source: The Conference Board of Canada.	

Table 7
Potential Skill Gains and Benefits of JTPs

Potential (future) skill gains

- increased ability to deal with change
- improved ability to use new technology
- improved health and safety knowledge

Potential (future) benefits

- increased morale
- more positive attitude toward employer/union
- more positive attitude toward labor–management relations
- greater desire to take part in further training

Source: The Conference Board of Canada.

Table 8
Union Perspective: Potential Skill Gains and Benefits of JTPs

Potential (future) skill gains

- increased ability to deal with change
- improved ability to use new technology
- improved health and safety knowledge

Potential (future) benefits

- eligibility for promotion
- increased morale
- increased participation in union activities
- more positive attitude toward union
- more positive attitude toward labor–management relations
- greater desire to take part in further training

Source: The Conference Board of Canada.

Table 9
Employers' Perspective: Potential Skill Gains and Benefits of JTPs

Potential (future) skill gains

- increased ability to deal with change
- improved ability to use new technology
- improved health and safety knowledge

Potential (future) benefits

- increased customer retention
- decreased worker turnover
- improved morale
- more positive attitude toward employer
- increased participation on committees
- increased ability to make decisions
- better understanding of how job performance affects workplace
- more positive attitude toward labor–management relations
- greater desire to take part in further training

Source: The Conference Board of Canada.

1 Michael Bloom and Brenda Lafleur, *Turning Skills into Profit: Economic Benefits of Workplace Education Programs* (New York: The Conference Board Inc., 1999), p. 5.

Leaders' Perspective

Two leaders from each of the three Joint Programs provided their perspectives on the value and impact of Joint Training Programs, why they are successful, and where they see opportunities for improvement in the future. Their insights reinforce the point that JTPs have significant value to everyone involved with them. They also highlight some of the challenges the programs face today and the importance of broadening and strengthening them.

Program Elements—Keys to Success

A universal theme among the leaders was the importance of a balanced, collaborative process to JTP design, operation, and evaluation. Training and training planning are ongoing activities that involve many levels of management and union leadership. Consultation and engagement of trustees, executives, vice-presidents of human resources, front-line supervisors, union representatives, workers, and others are vital to creating and maintaining buy-in. It also helps to ensure that training is relevant to industry and creates a community of interest that is large enough to work through the collective bargaining process, in order to establish really effective training programs.

Another view shared by the leaders is the importance of promoting the value of JTPs. They agreed that the benefits of skills gained through training should be actively marketed to workers, front-line supervisors, union representatives, and executives. They emphasized that it is important to show students how training leads directly to employment, through skill development and job preparedness. Similarly, employers need to know how investment in JTPs would yield a better-trained workforce, which would, in turn, cut turnover and improve productivity.

Training can and should result in skilful, employable individuals who are competent, motivated employees. Labor and management interest and engagement in JTPs tends to increase once everyone realizes that JTPs can meet the training needs of individuals, industries, and organizations at the same time. To this end,

processes to identify the concurrent skill needs of the industry, organization, and individual worker are crucial to JTP relevancy and to the ultimate determination of program success.

“The number one key is commitment on both sides, which is the basis for action, and communication, which is the basis for widespread action.”

*—Bruce McIver, President
The League of Volunteer Hospitals and
Homes of New York*

The Nature of “Jointness”

The leaders emphasized that having both labor and management at the discussion table allows for a holistic view of training, which is crucial to meeting the dual needs of individuals and employers simultaneously. In working together, labor and management views of training and of workers' development potential tend to expand and become more positive and optimistic. Today, many JTPs are marketed without specific mention of unions or employers, demonstrating that the primary interest of both parties is in developing workers' skills, and not in self-promotion. A suggestion from the leaders for building on “neutral” positioning is to involve outside professionals, who belong neither to the union nor to management, as objective third parties in developing and operating JTPs.

Management/Union Relationship

It has been said that, to work together effectively, labor and management must “learn to walk on both sides of the street.” By working together on JTPs, labor and management gain mutual respect and learn that they share common interests. When both sides are supportive of training efforts, they come together in

a positive frame of mind, with a goal of resolving differences through co-operative negotiations. In this way, training becomes a positive force in the relationship between labor and management, which has a “multiplier effect” on the collective bargaining process.

Struggles

Along with the benefits, there are many obstacles in running large, complex entities, such as JTPs. There are the inevitable administrative difficulties of managing large programs, and of keeping everyone engaged in the processes. At times, supply and demand incompatibilities of both training and jobs in certain industries reduce the impact of JTPs. Resourcing of training is another ongoing source of frustration to the leaders interviewed, who know that the impacts of their programs could reach even farther if more workers had access to them.

Areas for Improvement

The leaders highlighted several ways to improve the impact of JTPs. More widespread inclusion of literacy and basic skills training, leading to attainment of the GED (General Educational Development Diploma)—the high school equivalency diploma—would help workers become better prepared for other JTP offerings. The language in which training is delivered is a significant obstacle for some workers. Access to ESL (English as a Second Language) training could allow them to capitalize on the learning from other training courses. Providing skill needs assessments in various languages may also work toward providing relevant training to individuals.

Leaders also stressed the importance of providing training opportunities that are relevant to existing jobs. Investing in training that is practical and useful to both workers and employers avoids frustration and dissatisfaction.

By connecting training to work process improvement, training results can be more directly applied to the

work. After training, employers and workers can collaborate to find ways of applying the learning to the job.

Ideas were suggested for engaging management more closely in training and design. More training of local joint committees on the mutual gains of using maximum funds for training, rather than using training dollars as bargaining chips in contract negotiations, would heighten commitment at the working level. Encouraging human resource managers to attend training graduation ceremonies would allow them to see the positive impacts of training on worker-student morale and self-esteem. To further elicit a response from management, JTPs can make use of creative marketing to promote the benefits of investing in training. Ongoing discussions with management, regarding their current and future skills needs, can help focus training plans.

Rewards

JTP leaders felt great satisfaction from seeing students graduate, become self-sufficient, enter the workforce, earn a living, and contribute to society. As a conduit to help large numbers of people get and keep jobs, they feel that JTPs have an enormously positive impact on the workforces they serve. The training programs help address staffing shortages in many industries, while they simultaneously allow people to fulfill personal goals. Leaders also expressed personal satisfaction with being involved in a process that improves communication between labor and management, which ultimately improves relations between them.

More broadly, the leaders saw important customer, client, and societal benefits accruing from the success of JTPs. For example, health care training graduates have been essential to reducing nursing shortages in New York, with the result that health care in the city is “markedly better” for tens of thousands of patients every year. Similar results in the hospitality and communications sectors have improved workers’ jobs, while raising customer satisfaction.

Program Design Elements

Key Success Factors

The program design elements are the most important dimension for understanding why joint labor–management training programs are successful. For employers and unions, they are also the key to building or replicating Joint Training Programs in their own workplaces.

JTPs, with their mandated balance of representation, are very helpful in giving workers significant new opportunities to learn, according to an overwhelming number of interviewees. The interviewees identified the principal design elements that are common to the JTPs, and outlined how they contribute to achieving important learning outcomes. The following 12 principal design elements are featured in the detailed analysis:

1. Continuous process of balanced, collaborative consultation between labor and management, based on concurrence developed through collective bargaining
2. Learning needs analysis during program development process
3. Career/educational planning services available (career ladders)
4. Access to continuing educational opportunities
5. Access to financial assistance for education and training
6. Program marketing and promotion
7. Measuring and evaluating program effectiveness
8. Dual training focus: meeting worker and workplace needs
9. Voluntary participation of workers, whenever possible
10. Worker involvement in designing, implementing, and evaluating training
11. Multiple learning strategies for worker-students
12. Specific criteria for selecting and evaluating educational and training providers

All these program design elements have significant impacts on the training given through Joint Training Programs and are key success factors, as well. The precise significance of each of the design elements of the JTPs is outlined below.

1. CONTINUOUS PROCESS OF BALANCED, COLLABORATIVE CONSULTATION BETWEEN LABOR AND MANAGEMENT, BASED ON CONCURRENCE DEVELOPED THROUGH COLLECTIVE BARGAINING

Initially, concurrence is the basis for the continuous collaboration between employers and unions that underlies Joint Training Program success. Based on agreement reached in the collective bargaining process, many contracts specify that employers and unions will share roles and responsibilities equally, although this is not a necessary legal requirement. It is common for the employers and unions involved in JTPs to share equally the tasks and costs of training program conception, design, and development. The frequent mandate for equality has prompted the Joint Training Programs to develop an original strategy to ensure they meet contractual requirements. Most Joint Training Programs engage in a *continuous process of balanced, collaborative consultation* at every stage from conception, design, and development, to program delivery. This collaborative, consultative process is the single most important design element and it underpins every aspect of the JTPs.

While program tasks were shared by labor and management in each program, the interviewees did not fully appreciate the extent of the collaboration involved. In fact, they showed a rather mixed understanding of who designs, pays for, operates, and evaluates the training programs.

JOINT TRAINING PROGRAM PERSPECTIVE

The Joint Training Program administrators liaise with labor and management to discuss workplace and industry skill needs. Training courses, funding, delivery, and evaluation are handled through the Joint Training Program, on behalf of labor and management. Many of the interviewees from management and the JTP incorrectly believe that all parties involved in the training, including the worker-students, are fully aware of the JTP and its role in funding, designing, operating, and evaluating the training. With this misperception of how the training programs are viewed by the worker-students who take part in them, management, unions, and the Joint Training Programs are not likely to change the way they market the programs to workers. The result is a missed opportunity for management and the JTPs to capitalize on worker loyalty.

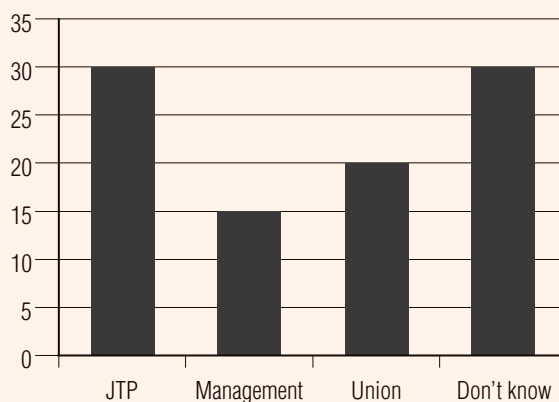
WORKER PERSPECTIVE

While the Joint Training Program representatives, managers, and union representatives had a fair understanding of how the training is designed, paid for, delivered, and evaluated, instructors and workers were less sure. Only about one-third of the worker-students interviewed knew that these aspects of their training were handled by the JTPs. For the most part, when in doubt, workers believed the union to be responsible for the training, especially in the running or operation of the programs. Most striking is the fact that none of the workers knew that management was involved in the operation of the training programs. Their perceptions are affected by how the training programs are marketed, which may result in negative views of their employers, or, at best, viewing employer contributions as minimal. Charts 1 to 4 show the worker-students' perceptions of who handles the various aspects of the training they take part in (according to the worker-students interviewed).

COMMUNICATION

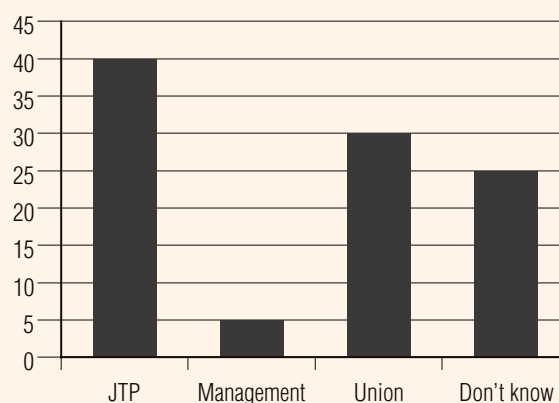
While the findings show that the Joint Training Programs have had a substantial positive impact on the skills of participating workers, they also indicate that these programs could have an even greater impact in the future. In some instances, this would be due to process improvements. Also crucial is the application of learning that occurs after participants return to their work. The research has revealed that, while trained workers' application of learning gained through the JTPs already yields valuable workplace benefits, employers and unions could significantly increase the extent to which these workers apply their learning on the job.

Chart 1
Who Funds Training Programs (N=35)
(percentage of responses)



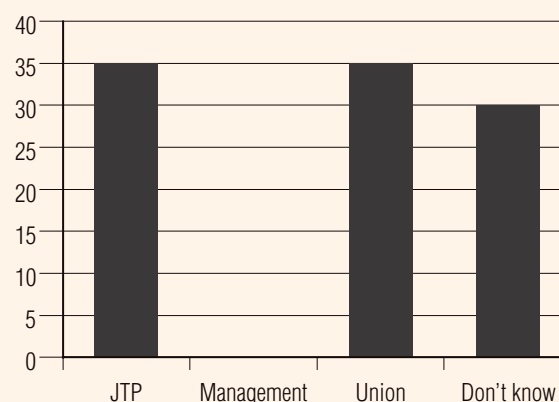
Source: The Conference Board of Canada.

Chart 2
Who Designs Training Programs (N=35)
(percentage of responses)

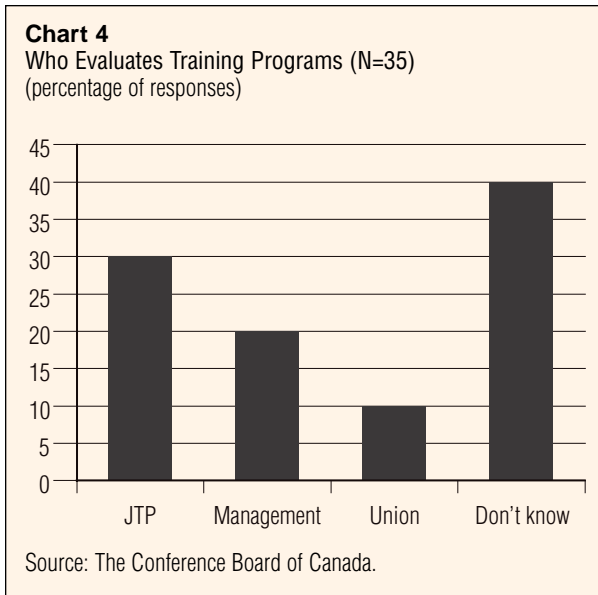


Source: The Conference Board of Canada.

Chart 3
Who Operates Training Programs (N=35)
(percentage of responses)



Source: The Conference Board of Canada.



The main problem is that there is often a gap between the training activities of the Joint Training Programs and what is happening in the workplace. First-line supervisors are often unaware of the extent of management's involvement, through the JTP, in every aspect of the training, including funding, developing, co-ordinating, and program evaluation. As a result, they tend not to look for the connections between the training their employees receive and subsequent work performance. This lack of awareness is a symptom of a communication gap that frequently exists between the workplaces and JTP committees. The communications gap, in turn, can have a negative impact on the willingness and ability of supervisors to incorporate workers' skill gains into their jobs.

Because communications breakdowns mean that supervisors do not fully understand the skills and knowledge gains of workers, they do not take full advantage of them to give trained worker graduates the appropriate additional responsibilities and tasks that they are now capable of performing. The unions, similarly, do not fully appreciate the impact of the training on the capacity of their members to perform at a higher level in their work.

The communications problem is heightened because of the failure of training graduates, their management supervisors, and union representatives to communicate with each other about skill gains. These groups are not sharing important information about skill gains or opportunities for correspondingly expanded roles and responsibilities for worker graduates.

Another aspect of the issue is that unions are not especially attentive to communications, in relation to enhanced work performance. They tend to focus more on the skill gains of their individual members and the value these will have for them, in relation to career development and general employability.

2. LEARNING NEEDS ANALYSIS DURING PROGRAM DEVELOPMENT PROCESS

Learning needs analysis precedes program development and delivery, thereby ensuring that the content and objectives of the training actually address real individual and workplace development needs from the first day of program delivery. To support this, JTPs build two types of learning needs analyses into their processes: individual and workplace. In both cases, the planned training benefits the workers, making them more employable. The individual's workplace also gains when his or her newly upgraded skills are applied on the job, after training. When the training taken allows a worker to be promoted, move into another job, or even another workplace, the industry sector further benefits from the general upgrading of workers in that field.

INDIVIDUAL LEARNING NEEDS ANALYSIS

To achieve the training goal of improving career prospects for the individual worker, individual learning needs analyses were generally offered through the Joint Training Programs' career planning services. Career path counselling (design element no. 3), through the JTPs, commonly includes an assessment of an individual's present skills and an examination of his or her career goals. Training is then used as the vehicle to get workers from where they are now in their careers to where they wish to be. In some of these cases, a pre-screening test was given before entry was permitted to some training courses. Other courses, especially at the college level, had well-defined prerequisites. The Licensed Practical Nursing and Physician's Assistant training programs offered through 1199 TUF are examples of training at the college level that required specific learning credentials before admittance was granted.

Sometimes, workplace needs—as defined by the employer—took precedence over individual learning needs in the training design stage. In these cases, individual learning needs analyses were conducted inconsistently, especially when the focus of the training goals was to improve job performance in a specific workplace. This is an area for attention and improvement.

WORKPLACE LEARNING NEEDS ANALYSIS

Within the employing organizations, needs analyses of the learners were limited. Training planning focused on the skills needed by workplaces for specific jobs, rather than on individual needs. For example, the Alliance training programs were designed to address specific job tasks. Improving efficiency, productivity, and product or service quality are common reasons why employers look to job-specific training. In most cases, the learning needs of the workplace are the first consideration, with job performance acting as the measure of success. However, there is often a lack of formal or well-conceived job performance measurement processes in place to adequately assess the impacts of the training.

3. CAREER/EDUCATIONAL PLANNING SERVICES AVAILABLE (CAREER LADDERS)

Student-worker access to career and educational planning services—career ladders—through the Joint Training Programs plays a significant role in helping employees create and follow their own career paths. Career ladders help to elevate the training experience into a personal development process. This has important implications for the work and career success of employees who take advantage of these services. Their current relative under-use may be a sign that many workers are not yet aware of their availability. Better communications might improve the situation.

Like the training courses themselves, career and educational planning services are available to students on a voluntary basis. Many students took advantage of these services, although they seem generally under-used. It follows that workers who proactively enroll in programs to upgrade their skills are generally interested in advancing their careers. The training programs and career advancement counselling services work in tandem as individual students work to advance their employability.

THE ALLIANCE

The Alliance began in 1986 with the goal of providing employees with opportunities to train for future jobs within the company, and to help people become better equipped to live and work in a changing world. The changing nature of work prompted the move to make employees more employable, rather than more secure in their jobs. The Alliance continues to offer career path counselling, and works to market these services to raise awareness of their existence and value to workers. The rapidly changing nature of work in the technology and telecommunications sectors is a constant consideration in the career planning process. Professional advisors work with employees to find training in time to make job changes, or to prepare for work outside their company. In this sense, the career ladder extends beyond any one workplace.

“I would never have gone into this field if the training hadn’t been offered; I’m a better person for it.”

—Student, Culinary Training Academy

CULINARY TRAINING ACADEMY

The career ladder professionals at the CTA take the initiative to attract workers to their programs with the specific intention of causing them to take a new step along the career path. At the Culinary Training Academy (CTA), workers are encouraged to use the training opportunities to get new and better jobs and to forge new careers. At the CTA, students reported being enticed by the union’s newspaper advertisements for free training. Waived union dues while a student is enrolled in a course is a further incentive to take part. Once in the training system, students felt encouraged to take additional courses. The CTA’s efforts go even further: one of the most popular strategies for building employee capacity is to actively recruit for new entrants into the hospitality sector, who will then be trained at the CTA.

“All students have shown the desire to do more training in this and in other areas of work in the industry.”

—Supervisor, 1199 TUF

HOSPITAL LEAGUE/1199 TUF

With the Hospital League/1199 TUF, many students use the training opportunities as career change agents to gain qualifications and obtain new and better jobs. Many others use it for the more limited purpose of upgrading their skills for continued success in their current jobs. Depending on the type of job and nature of the training taken, training can assist workers to move into different career paths. Training programs such as the Licensed Practical Nursing and Physician’s Assistant are two examples of 1199 TUF training as career change agent. While this is positive for the students, some managers are reluctant to encourage training, since it may mean staff turnover for them. In some instances, such as with the Billing and Coding training program, workers learned skills that could advance their careers, but their workplaces offered limited advancement opportunities.

4. ACCESS TO CONTINUING EDUCATIONAL OPPORTUNITIES

Access to continuing educational opportunities, offered through JTPs, is an important design element because it is an essential complement to the career ladder process. In a sense, the continuing educational opportunities are the rungs on the career ladder. As with the primary training courses, additional training courses are usually voluntary for worker-students. Although most adult worker-students were anxious about returning to the classroom for the initial training course, they often became enthusiastic learners once the initial course was completed. Many of the students interviewed had taken part in more than one training course, or intended to enroll in a second course. The convenience and low cost of the programs offered through the JTPs made it easy for worker-students to continue to participate in training courses. Although most of the students interviewed said they could have received the same training through another source, it

would have been costly, often prohibitively so, for them personally, in terms of convenience and funding.

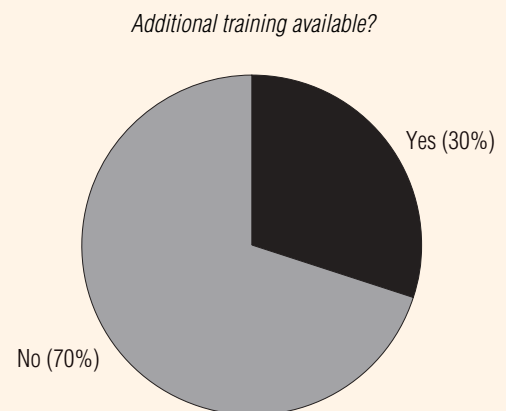
“At this time in the U.S., there is a shortage of qualified people. These students have asked me about certification and further training . . .”

—Instructor, 1199 TUF

Although additional educational opportunities are available through the JTPs studied, many worker-students lack awareness of these options. Fully 70 per cent of the worker interviewees incorrectly thought that additional training, related to the course they were currently enrolled in (or had just completed), was not available to them through the Joint Training Program (see Chart 5).

When a worker takes part in their first training course, a huge hurdle has been jumped. However, to keep them on the path of lifelong learning, it is often not enough simply to make further training options available. The existence of additional training programs needs to be communicated effectively to the worker-students. Students cannot enroll in programs if they don’t know they exist. Better communication about further training opportunities would increase uptake.

Chart 5
Worker Views of Additional Training Available (N=35)



Source: The Conference Board of Canada.

5. ACCESS TO FINANCIAL ASSISTANCE FOR EDUCATION AND TRAINING

Financial assistance for education and training given to workers through the JTPs is both beneficial and necessary. All workers interviewed appreciated the opportunities to improve their skills and move into new careers. Many stated that they could have received the same training through other means (often, in fact, the programs are specially customized and not available elsewhere), but it would have taken them longer, cost more, and been inconvenient. For many, financial assistance was crucial to participating in training over an extended period. Without access to funding, they would have withdrawn—or not begun in the first place.

THE ALLIANCE

Where training was delivered in the workplace, as at the Alliance, there was often no cost to workers. One of the strongest incentives to take part in training, as stated by the workers interviewed, was that “it was free!” Many commented that they had always had an interest in learning and improving their skills, but the financial burden of obtaining training on their own had previously prevented them from doing so. While the JTPs’ offer of free training is a major benefit to workers, workplaces and unions both benefit from the impacts of the increased enrollment of individuals in skills upgrading programs.

1199 TUF

Similar to the situation at the Alliance, training at the 1199 TUF was delivered in the workplace and offered at no cost to 1199 workers. For 1199 TUF training that was given through post-secondary educational institutions, tuition was prepaid, reimbursed, or otherwise covered. The Joint Training Program also paid for students’ books, uniforms, and some additional expenses directly related to training. Although 1199 TUF also covered the expense of backfilling workers who were absent due to training, many workplaces did not take advantage of this. Despite the lifted financial burden, managers found it difficult to make use of the paid backfill option because qualified replacement workers are hard to find. The JTPs’ offer to cover the costs of replacement workers is a substantial incentive for workplaces to encourage training, but there are other obstacles to overcome before this can be used to full advantage.

CULINARY TRAINING ACADEMY

A great many of the Culinary Training Academy’s courses assist workers to find new jobs or to move up to more advanced positions in their occupational fields. The union provides financial incentives to workers by waiving a period of union dues for successful completion of a training course. This not only increases enrollment numbers, but also raises members’ awareness of, respect for, and loyalty to the union. There are some minor costs to students, such as having to fulfill basic dress codes, but the courses themselves are generally free to workers.

6. PROGRAM MARKETING AND PROMOTION

Program marketing and promotion are important to the balanced collaborative process because they are the primary vehicles for communicating training choices and decisions to workers, management, and unions. Ongoing communication to stakeholders of the value of training is a vital step in maintaining the program’s visibility. In fact, marketing and promotion largely determine worker participation and stakeholder buy-in.

There was very little evidence that the Joint Training Programs were advertised directly in the workplaces of the students. Instead, the unions heavily promote training to members, with the result that most students perceive the union to be responsible for all aspects of the training. While the unions are being given too much credit for their share of the training design, funding, operation, and evaluation, management is not being afforded enough.

These findings fit with those of the ASTD,¹ which found that unions invest more effort than management in training marketing and promotion. The problem arises that management is losing out on the chance to gain employee loyalty. Staff turnover in some industries, including telemarketing and hospitality, is high, and is a significant cost. Within the three programs studied, managers stated that the cost of replacing an employee in their organization ranged from \$1,000 to \$35,000. Being an equal partner in a joint educational program could be an excellent selling point for employers to recruit and retain staff. The best part of this benefit is that management would be getting credit for something they are already doing.

“The hotels don’t know how valuable courses like this are to them. If they did, they’d invest much more in this training. Impacts could be far greater, given the huge number of employees in Las Vegas hotels . . .”

—Student, Culinary Training Academy

Program marketing and promotion, in general, is a useful tool for increasing worker enrollment in Joint Training Programs. Almost all workers and managers were highly satisfied with the training they were involved in, and had high praise for the training system, content, and delivery. Those with some experience with the JTP training system could not understand why more workers and workplaces were not involved. There was recognition, at all levels, that the training given through these JTPs, although popular, was still somewhat under-used, considering its potential, and that enormous benefits could be gained if only more people knew about, or made more use of, the training opportunities.

Continuous marketing of the Joint Training Programs’ initiatives to all involved is a primary ingredient for their sustainability. Getting the word out to potential students is not enough: managers, who greatly influence workers’ decisions and availability, also need convincing that worker participation is a benefit and a long-term investment for industry. Similarly, union representatives, who also influence members’ decisions and ways of thinking, are potential catalysts for increasing the enrollment numbers in JTP courses. Marketing the benefits and value of training to managers and union representatives can make JTP “salesmen” out of them, where they, in turn, market the benefits to potential students. The Joint Training Programs can then leverage other stakeholders’ influence on workers to encourage and promote training, hopefully leading to increased enrollment and better use of the JTP services and course offerings.

7. MEASURING AND EVALUATING PROGRAM EFFECTIVENESS

Measuring and evaluating program effectiveness is among the most infrequently employed design elements. Greater use would enhance results and build the case among workers, unions, and senior management about the economic benefits of workplace education for employers and workers. This may seem counter-intuitive, since it is also true that, throughout the Joint Training Programs, there is an overwhelming perception that the training programs are beneficial to the individuals who take the training and to their workplaces and unions. However, in many cases, managers used phrases such as “I assume . . .” and “hopefully . . .” when asked about specifics of the training effectiveness. This limits their capacity to make the case for workplace education to CEOs and other very senior managers, whose buy-in would allow for program growth and intensification.

“The training has resulted in sales increases of at least 20 per cent, in addition to tips.”

—Manager, Culinary Training Academy

CULINARY TRAINING ACADEMY

With the Culinary Training Academy interviewees, the hospitality managers interviewed made reference to a combination of hard measures, such as sales increases, time per task decreases, and improved product knowledge, and to soft measures, such as the self-confidence of workers. Workers tended to judge the effectiveness of the training solely using softer measures, such as gains in self-confidence and competence levels, greater appreciation for learning, and improved abilities to work with co-workers, supervisors, and customers. The hospitality industry traditionally carries the weight of high staff turnover, but the Culinary Training Academy courses help to curb this trend. Managers and Joint Training Program representatives report that CTA graduates are prime recruits for hotels and other businesses because they have confidence in CTA training.

THE ALLIANCE

Alliance workers had a lot to say about softer measures of training effectiveness, including better ability to deal with changes in the workplace and improved ability to communicate with customers. Managers and JTP representatives reported that workers had more positive attitudes towards the union and the companies they worked for, as a result of training. Alliance workplaces make use of a regular internal satisfaction survey to find out about workers' opinions. Some hard measures of training effectiveness were used, such as customer response time and number of worker promotions that resulted from training. Workers self-evaluated their skills before and after taking part in training.

“The average customer response time was reduced to 4.3 minutes—before training, it was 10 minutes.”

—Joint Program Representative, The Alliance

There were some concerns from both managers and workers that the training did not relate closely enough to job tasks. Some also felt that the goals of training were not clear, which hindered the overall effectiveness of the training initiatives. Closer ties between training, personal development, and job activities were suggested. This makes sense and emphasizes that individual career path development and skills upgrading in the workplace need not be separate processes.

“Training has led to an increase in the number of union members graduating and passing the national Board Exams.”

—Union Representative, 1199 TUF

1199 TUF

Performance measures of the impacts of 1199 TUF training were largely subjective. Union representatives cited an increase in professional qualifications and more positive attitudes towards work and unions from workers who took part in training. Managers mentioned increased ability to work as a team and more knowledgeable workers. Fewer errors and overall increased productivity are examples of hard measures also referenced. Workers spoke of soft impacts, such as improved ability to work as a team and increased employability. For some courses, measurement of training effectiveness was limited to job promotion, since workers who successfully completed training moved on to other jobs and other workplaces.

HARD VERSUS SOFT MEASURES

On the whole, the Joint Training Programs rely more heavily on soft measures in evaluating the effectiveness of training. Attitudinal changes towards work, one's employer, and one's union were the most common impacts mentioned by interviewees. While these measures are difficult to quantify, they are important factors to consider, nevertheless. Even courses that focus on task-oriented activities, such as 1199 TUF's Billing and Coding data training, can bring about soft impacts, such as improved teamwork and increased job satisfaction. Soft impacts affect an individual's employability skills and increase the cohesiveness and ability of workplaces to deliver products and services.

Hard impacts, such as time-per-task, increased sales, and increased number of customers served, are always impressive and typically relate directly to the bottom line of the workplace. Finding and measuring hard impacts is not always easy though, and so, is often neglected in workplace training. Neglecting hard measures is risky, since most workplaces require some kind of financial justification to sustain the efforts required for operation of the training programs. When Joint Training Programs measure both hard and soft impacts of training, a clear, comprehensive picture of training effectiveness can result. Used together, hard and soft measures of training provide strong motives for employers and unions to maintain or expand training opportunities.

8. DUAL TRAINING FOCUS: MEETING WORKER AND WORKPLACE NEEDS

A simultaneous dual training focus on the individual worker-student, and on the workplace or organization, helps to ensure that the training plans and delivery are genuinely relevant to the learning needs of both workers and their employers, right from the beginning. The Joint Training Programs differ in their approaches but, in most cases, the attempt to address both focus areas meets with moderate success. The Alliance displayed the strongest means of addressing the learning needs of both the individual worker and the workplace. At the Alliance, there is a strong drive towards promoting lifelong learning, as well as workplace productivity. Alliance training aims to both provide the skills needed to enhance employment security and meet the competitive needs of the business. The training given through the Culinary Training Academy and 1199 TUF also serves individual workers well, through career path planning and job preparation. However, many of their training courses seem to be designed primarily to benefit the industries they serve, rather than individual workplaces, as successful graduates often move into new jobs and/or new workplaces.

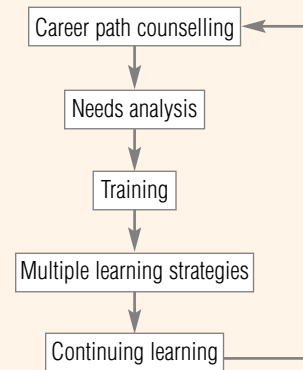
INDIVIDUAL WORKER FOCUS

For individual workers, there is a clear, comprehensive system in place in the great majority of Joint Training Programs (see Figure 1). Career path counselling services are available, which include aid in deciding what training courses would best help the worker reach his or her career goals. Also, different types of learning strategies are usually available to accommodate different learning styles. Additional training in the same area is encouraged, once the worker enters the JTP training system. Then, continuous assessment of the worker's progress is made possible through career path counselling, in which training is adjusted when goals change.

WORKPLACE/ORGANIZATION FOCUS

The plans for skills upgrading to meet employer needs varies among and within JTPs. Some JTPs focus on meeting the aggregated needs of all their members in each course or program they run. Typically, this involves meeting the needs of a group of businesses or organizations in the same sector by focusing on meeting the needs of a broad group of individual learners.

Figure 1
Career Path Counselling



Source: The Conference Board of Canada.

For example, the Culinary Training Academy's stated mission is to upgrade workers' skills to support the changing workplace needs of the entire hospitality sector in Nevada. Its graduates are then free to find appropriate work to match their skills in a workplace of their choosing. Similarly, with the Licensed Practical Nurse and the Physician's Assistant training with 1199 TUF, individual workers who complete training typically move into new jobs, and often, new workplaces. The net gain on skills, then, belongs to the health care industry, rather than to the students' original workplaces.

Some JTPs take a mixed approach. They run some programs that are targeted at specific employer's needs, as well as programs that focus on individual learners' needs and the sector as a whole. For example, 1199 TUF's Billing and Coding training program is workplace and job specific, customized to meet individual employers' needs. The Alliance's programs cover the gamut between customized programs that specifically address individual employer's needs and programs that are entirely worker-focused.

Whatever the thinking behind program design, the importance of skill development, through JTPs, needs to be clearly communicated and the implications for work spelled out to workers, managers, and unions alike. When this does not occur and students complete training and stay with their current workplaces, there is not always a clear link between the training offered and the corporate strategy for upgrading the skills of the workforce. In fact, many interviewees cited

a disconnect in this area, saying that the training did not relate directly to workers' jobs, or that they did not understand the connection between the training and the tasks involved in workers' jobs. This may be due to the training content, a lack of communication between management and workers on the purpose of training, or other factors.

Where interviewees do not see the connection between training and workers' jobs, it is likely that others involved with Joint Training Programs do not fully grasp the purpose of training. If not addressed, the disconnect between organizational strategy and training will ultimately affect employer, union, and worker buy-in of training in a negative way.

9. VOLUNTARY PARTICIPATION OF WORKERS, WHENEVER POSSIBLE

Participation in JTPs is voluntary for workers in the vast majority of cases. This aligns with a basic principle of adult education, which says that adults are more receptive to learning, and retain more of what they have learned, if they are willing and voluntary participants in the training. Those students interviewed in the study were appreciative of the opportunity to take part in training through JTPs. While allowing workers to volunteer for training typically results in lower enrollment figures, it also goes a long way towards creating life-long learners who feel they control their own education plans and careers.

Outside the world of joint labor–management education, voluntary workplace training is less often employer-paid or given on company time. The Joint Training Programs take on considerable risk when they offer voluntary training for free to workers during working hours. Mechanisms to make voluntary learners accountable may be difficult to design and implement, but can offset the risk. Such mechanisms could include tying certification to promotion opportunities and linking successful program completion to increased pay or bonuses.

“Taking a course with co-workers allows us to study together during lunch hours and to encourage each other with our work.”

—Student, 1199 TUF

A CASE FOR MANDATORY PARTICIPATION

In some cases with the Alliance training, workers felt obliged to take part in training. These Alliance training offerings are technically voluntary, but are not promoted to workers as such. When workers arrive at their workplace and are told by their managers to report for training, they perceive the training as mandatory. When participation is mandatory, or perceived to be mandatory, there is a risk of sacrificing the benefits of training and positive attitudes (“buy-in”) of the student workers. The risk undertaken with mandating training is that it goes against the adult education concept of creating a community of learners who participate because they wish to. In the case of the Alliance, the training instructors work to heavily market the value of the training to the workers, as individuals.

Mandatory training is typically employer-paid and given on company time. There are some benefits gained from mandatory training (or training that is perceived by workers as mandatory). Enrollment is normally higher than for voluntary training, and managers can ensure that whole teams of workers take part in training together, giving them the same level of knowledge and skills. Raising the level of customer service, increasing product knowledge, health and safety awareness, or simply maintaining or refreshing existing skills, are reasons used by many companies for mandating training. This type of training is often referred to as “core training” because it affects the very core of their businesses. Done properly, it can prove beneficial to both employers and employees at the same time.

10. WORKER INVOLVEMENT IN DESIGNING, IMPLEMENTING, AND EVALUATING TRAINING

Workers who are members of Joint Training Program Committees play a substantial role in designing, implementing, and evaluating the training programs. The JTP administrators work closely with them, and with managers and unions, who are also committee members, to discuss the training needs of the workplaces so they can plan the training accordingly. Other employees play little or no role in the Joint Training Programs' design, development, and delivery decisions. These findings are substantiated by the ASTD's broad-based study of JTPs, which found that management and union representatives were heavily involved in decisions regarding training needs assessments, promotion of training, and determining training eligibility.² Workers, according to the ASTD, when they did participate, were mostly involved in decisions regarding learning needs assessments, promotion, training design, and training locations.

This method of planning seems to work, as the students interviewed highly commended the content of the training taken. Managers, too, said that the training offered was highly relevant to the students' work, and that the upgraded skills were greatly beneficial to the workplaces. However, these managerial evaluations of the effectiveness of the training were largely informal and based on managers' feelings and perceptions, rather than on formal measures. If workers were more involved in the planning, whether through Joint Training Program Committees or other means, they could offer greater insights into the reality of their job tasks and work environments. JTP decision makers would then be even better informed, with a more complete picture of how training can and should relate to what workers do in their daily jobs.

11. MULTIPLE LEARNING STRATEGIES FOR WORKER-STUDENTS

Different multiple learning strategies are used in JTP training courses, depending on who is taking part, who is delivering, and what is being learned. The key point is that adults get the best learning

results when they get the opportunity to learn, using techniques or methods best suited to their learning style, in environments they find conducive to learning. For instance, with the 1199 TUF, training for Licensed Practical Nursing was taken through local college programs. However, training for Billing and Coding was delivered at the students' workplace and taken with their fellow workers, as a group. This delivery method enabled the trainer to use work-related problems in the course content and enhanced the ability of the co-workers to function as a team. Use of computers and other learning technologies was more common for those training programs delivered at the workplace. Training, according to most interviewees, was delivered in an appropriate setting for learning to take place.

“Training made the students into a whole unit; they studied and worked as a group.”

—Manager, 1199 TUF

In addition to primary delivery methods, optional learning methods were offered by the Joint Training Programs to many workers. For example, some workers were offered access to a reference library and mentoring services, in addition to course work with a live instructor. Workers who did make use of these optional resources found them helpful and relevant to their training. Offering additional learning resources acknowledges that people learn in different ways, and gives students options for extending their knowledge.

Multiple learning strategies impact positively on some students' learning and could have an even greater impact if more students were more aware or made more use of them. Currently, such options are under-used by worker-students, who are unaware of their availability or unclear about their value. Although not every worker needs to make use of alternative learning strategies, better communications would likely increase uptake by those who could genuinely benefit.

12. SPECIFIC CRITERIA FOR SELECTING AND EVALUATING EDUCATIONAL AND TRAINING PROVIDERS

Finding competent training providers and vendors for their programs is a major challenge confronting JTPs. Programs that have clear and compelling criteria for selecting and evaluating educational and training providers to determine the quality of their products and services, and their ability to achieve the desired learning outcomes for workers, are more successful than those that do not have such criteria.

The criteria should take into account the fact that most of the training focuses on specific types of jobs and job tasks so that the training needs of the JTPs are explicit, as far as content and delivery are concerned. One major criterion is that the training provider needs to be able to customize the service to fit the exact needs of the Joint Training Programs and directly link these with workers' job tasks.

“The training is like giving eyeglasses to a person with poor sight.”

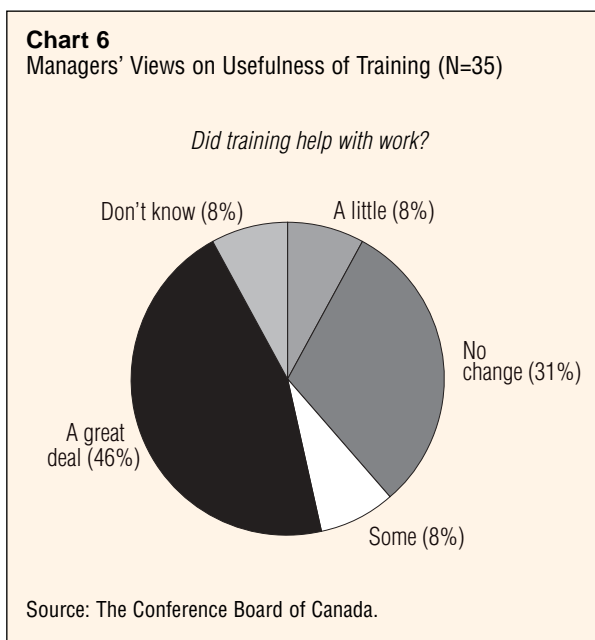
— *Instructor, Culinary Training Academy*

The criteria ought to explicitly incorporate adult learning principles and recognize that the students are adult learners: people who work full-time and have other commitments outside the workplace and the classroom that take up a large part of their time and energy. Finally, most workplaces have particular methods they like their workers to use. Ideally, the training given to workers would align with the employers' preferred methods of doing business. Many of the managers interviewed said that the training their workers took did not help them with the tasks they perform in

their jobs (see Chart 6). This may be a reflection of the training content, the competency of the training providers, or retention of skills by the workers.

Often, the Joint Training Programs must choose between hiring an external training provider and finding or creating trainers within the workplaces. The Culinary Training Academy JTP provides the training to workers in its own separate training facility. The instructors are experienced in the industry, and have often worked in the very workplaces where the students hope to find work. As a result, they can teach more broadly about the industry, as well as job tasks.

1199 TUF frequently uses local colleges because they are convenient for workers to access and they provide a consistently high standard of health care training in specialized fields. One disadvantage of using external training providers is that they are isolated from the workplaces and are not able to see the benefits of the training to the workers in their jobs. External trainers also do not usually work closely with the students' employers to ensure that the training given aligns closely with the student-workers' job tasks.



1 Mark E. Van Buren, *What Works in Workforce Development: The ASTD/AJLMEP Study of Joint Labor-Management Educational Programs* (Alexandria, Virginia: ASTD, 2002), p. 9.

2 Ibid.

Key Success Factors for JTPs

Each design element is important to the success of JTPs. Here are some of the major reasons for their importance:

- 1. Continuous process of balanced, collaborative consultation between labor and management, based on concurrence developed through collective bargaining**
 - essential, given the often mandated 50/50 structure of JTPs; and
 - good working relationships that come from continuous collaboration are key to finding solutions to the inevitable obstacles of instituting and maintaining programs.
- 2. Learning needs analysis during program development process**
 - important for realistic and relevant learning goalsetting, for both individual workers and their employing organizations; and
 - provides a basis for measuring the success and impacts of the training programs against meaningful metrics.
- 3. Career/educational planning services available (career ladders)**
 - tied to individual learning needs analysis and learning goals;
 - availability is a strong incentive for workers to take part in training; and
 - turns training from an activity a strategy for self-development.
- 4. Access to continuing educational opportunities**
 - essential for workers to progress in their career/educational paths and to reach their learning and career goals;
 - removes a major practical barrier that stops many workers from further education; and
 - also a strong incentive for workers to take part in training.
- 5. Access to financial assistance for education and training**
 - without financial assistance from JTPs, many workers could not take part in skills upgrading programs; and
 - an essential part of the training incentive system, because it reduces the financial risk of investing personally in training for self-development.
- 6. Program marketing and promotion**
 - the ways and means of getting the word out to training stakeholders; and
 - important, not only to raise enrollment numbers, but also to create managerial and union buy-in for worker training.
- 7. Measuring and evaluating program effectiveness**
 - assessment of the goals of training against their actual success in achieving desired outcomes; and
 - measured program effectiveness justifies the investments made in training efforts and provides the basis for further funding and activity.
- 8. Dual training focus: meeting worker and workplace needs**
 - creates the basis for a “win–win,” from the beginning of the program development process; and
 - lends balance to the sometimes competing interests of individuals and organizations.

9. Voluntary participation of workers, whenever possible

- voluntary participation stimulates workers to invest extra energy in achieving results they have chosen for themselves; and
- mandatory training may be preferable for certain types of training, such as health and safety, where it is important that all workers gain familiarity and achieve a level of competence.

10. Worker involvement in designing, implementing, and evaluating training

- employee involvement ensures a worker perspective on what job skills need to be learned for higher performance, which provides a “reality check” on organizational plans; and
- helps to create buy-in among workers who feel that training is genuinely focused on their needs, as well as on those of their employers.

11. Multiple learning strategies for worker-students

- takes different learning styles of individuals into account and recognizes that adults learn more when they are given a learning option that really suits them; and
- generates higher training completion rates, better learning results, and better application to work.

12. Specific criteria for selecting and evaluating educational and training providers

- clear basis for selecting providers ensures that fair and effective choices are made; and
- allows for the customization of training to the specific needs of the JTPs.

Program Development Process

The Program Development Process (PDP) outlined in this section is based on the findings in chapters 1 to 6 of this report. The approach and activities suggested in the PDP are intended to help management and unions work effectively together at every stage in the development of their Joint Training Programs. The PDP is not a complete how-to guide that covers every aspect of program development; it shows program developers how they can apply the 12 key design elements to their existing planning processes, and helps them to get on the right track if they are entering the start-up phase.

There are three components to the Program Development Process:

1. **Component One**—using the Plan-Do-Check-Act Cycle for JTPs—is a tool to help program developers identify and order their planning and implementation processes, in relation to a well-known planning cycle.
2. **Component Two**—incorporating Design Elements in the PDCA Cycle—is a tool to help program developers ensure that each stage of the planning and implementation process includes the key aspects of the program design elements for success.
3. **Component Three**—connecting the PDCA Cycle into the JTP Life Cycle—is a tool that allows program developers to connect the three phases of the JTP with the Plan-Do-Check-Act Cycle.

COMPONENT ONE—USING THE PLAN-DO-CHECK-ACT CYCLE FOR JTPs

This tool, the *Plan-Do-Check-Act Cycle for JTPs* (see box, **Traditional Planning Process** and Table 10) helps program developers identify and order their planning and implementation processes, in relation to the well-known PDCA planning cycle.

The PDCA cycle is a four-stage process that starts with Stage 1—Planning—and continues to Stage 4—Acting. On completion of Stage 4, the cycle repeats itself as a continuous improvement process.

Traditional Planning Process

Most JTPs fit into a traditional model involving needs, actions, outcomes, and impacts, outlined below. Needs refers to learning needs, either the individual worker's, or the workplace's or organization's. Actions refers to those steps taken to provide training solutions to meet learning needs. Outcomes refers to what workers learn, or the skills they gain from the training program solutions. Impacts refers to the consequences of training, including the benefits derived, such as increased productivity or improved customer service, due to learning and skill gains.

Assess needs	<ul style="list-style-type: none"> • assess workplace or individual skill needs • quantify needs, when possible, using clear metrics
Take action	<ul style="list-style-type: none"> • develop and implement training programs to meet needs
Gain outcomes	<ul style="list-style-type: none"> • workers learn or gain skills by taking part in training programs
Identify impact	<ul style="list-style-type: none"> • identify impacts and benefits to employers and workers due to learning and skill gains

This traditional model translates into the four-stage Plan-Do-Check-Act Cycle for JTPs, outlined in Table 10, which is based on the well-known PDCA planning and implementation cycle—widely used by organizational and program planners and management experts.

The Plan-Do-Check-Act Cycle for JTPs can be used as a standalone tool that provides a basic framework for program development. However, it is recommended that JTP developers use the Plan-Do-Check-Act Cycle for JTPs in conjunction with the 12 program design elements identified in this study as key success factors (see Component Two—Incorporating Design Elements in the PDCA Cycle).

The suggested process for incorporating the design elements is:

1. Review Table 10.
2. Identify which stage of the PDCA Cycle you are at.

Table 10
The Plan-Do-Check-Act Cycle for JTPs

Stage 1: Plan	Stage 2: Do	Stage 3: Check	Stage 4: Act
<input type="checkbox"/> Evaluate learning needs of workplaces and individual workers <input type="checkbox"/> Quantify needs, when possible, using clear metrics <input type="checkbox"/> Identify resources required <input type="checkbox"/> Clarify roles and responsibilities <input type="checkbox"/> Select programs, curriculum, suppliers <input type="checkbox"/> Develop programs <input type="checkbox"/> Set eligibility criteria for workers to participate	<input type="checkbox"/> Implement training programs to meet needs <input type="checkbox"/> Market and promote training opportunities in the programs <input type="checkbox"/> Workers learn or gain skills by taking part in training programs	<input type="checkbox"/> Evaluate effectiveness of programs <input type="checkbox"/> Identify impacts and benefits to employers and workers due to learning and skill gains <input type="checkbox"/> Review training goals against actual outcomes and assess the gap <input type="checkbox"/> Identify successes and failures <input type="checkbox"/> Modify processes to close gaps and achieve targets	<input type="checkbox"/> Implement revised programs <input type="checkbox"/> Continue marketing and promotion <input type="checkbox"/> RETURN TO STAGE 1 AND REPEAT CYCLE

Source: The Conference Board of Canada.

3. Review the content of the column for that stage carefully.
 - Each stage contains key actions that most programs require for success.
4. Check (✓) which of the key actions are relevant to your program.
 - The checklist is not exclusive or exhaustive. Some developers will need to add additional actions at each stage; others may choose not to apply some of those specified above. However, it is recommended that developers consider each suggestion for possible inclusion in their plans.
5. For each relevant action, consider method and resources required to implement it.
6. Discuss, as appropriate with partners, adjust plans and take action.

COMPONENT TWO—INCORPORATING DESIGN ELEMENTS IN THE PDCA CYCLE

This tool, *Incorporating Design Elements in the PDCA Cycle* (see Table 11) helps program developers to ensure that each stage of their PDCA planning and implementation process includes the key aspects of the program design elements for success.

Incorporating Design Elements in the PDCA Cycle presents program developers with aspects of each design element that are most relevant at each of the four stages in the Plan-Do-Check-Act Cycle.

The suggested process for incorporating the design elements is:

1. Review Table 11.
2. Identify which stage of the PDCA cycle you are at.
3. Review the content of the column for that phase carefully.
 - Each column has 12 boxes, one for each design element, containing one or more aspects of the design element.
4. Check (✓) which of the key aspects in each box are relevant to your program.
 - The checklist is not exclusive or exhaustive. Some developers will need to apply other aspects of the design elements at each stage; others may choose not to apply some aspects. However, it is recommended that developers consider each suggestion for possible inclusion in their plans.
5. For each relevant aspect you check, consider method and resources required to implement it.
6. Discuss, as appropriate with partners, to adjust plans and take action.

COMPONENT THREE—CONNECTING THE PDCA CYCLE INTO THE JTP LIFE CYCLE

This tool, *Connecting the PDCA Cycle into the JTP Life Cycle*, (Table 12), allows program developers to connect the three phases of the JTP with the Plan-Do-Check-Act Cycle.

Table 11
Incorporating Design Elements in the PDCA Cycle

Program design	Stage 1: Plan	Stage 2: Do	Stage 3: Check	Stage 4: Act
1. Balanced collaborative consultation between labor and management, based on concurrence through collective bargaining	<input type="checkbox"/> equal representation by management and union on decisions	<input type="checkbox"/> management and union share ongoing funding, operation, and marketing of training	<input type="checkbox"/> management and union share ongoing evaluation of training	<input type="checkbox"/> management and union agree on ways to improve training system
2. Needs assessment and program development process	<input type="checkbox"/> management and union collaborate on skills to be upgraded	<input type="checkbox"/> individual needs assessments, in conjunction with career development counselling	<input type="checkbox"/> review training content to maximize relevancy	<input type="checkbox"/> revise needs assessment process to find the best fit between skills development and training
3. Career/educational planning services	<input type="checkbox"/> unions and workplaces agree on the types of counselling services to be available	<input type="checkbox"/> develop, deliver, and promote career path planning services <input type="checkbox"/> promote benefits of career path planning services	<input type="checkbox"/> track worker career path success against planning goals	<input type="checkbox"/> work continuously with workers to help them achieve career goals
4. Access to continuing educational opportunities	<input type="checkbox"/> unions and workplaces agree on the types of continuing educational opportunities to be available	<input type="checkbox"/> develop, deliver, and promote continuing educational opportunities <input type="checkbox"/> promote benefits of continuing educational opportunities	<input type="checkbox"/> track worker enrollment and success in continuing educational programs against planning goals	<input type="checkbox"/> unions and workplaces work continuously with workers to help them access continuing educational opportunities
5. Access to financial assistance for education and training	<input type="checkbox"/> management and union agree on aspects of funding available to workers in training	<input type="checkbox"/> design and use simple application processes <input type="checkbox"/> use financial assistance as a promotional tool	<input type="checkbox"/> track worker enrollment and success in programs against financial targets	<input type="checkbox"/> continue to offer financial assistance to eligible workers in programs deemed most appropriate
6. Program marketing and promotion	<input type="checkbox"/> create buy-in at all levels in employing organizations and unions	<input type="checkbox"/> shared by Joint Program, management, and union	<input type="checkbox"/> review worker interest and enrollment against targets	<input type="checkbox"/> revise marketing strategy to increase uptake
7. Measuring and evaluating program effectiveness	<input type="checkbox"/> build measures of effectiveness into design process	<input type="checkbox"/> include hard and soft measures that relate training to skills learned	<input type="checkbox"/> consider effectiveness of measures against training goals	<input type="checkbox"/> include results into ongoing program upgrades or adjustments
8. Training focus: worker versus workplace	<input type="checkbox"/> address both individual worker needs and learning needs of the workplace	<input type="checkbox"/> provide a balance of training opportunities	<input type="checkbox"/> assess impacts of training on the skills of both individuals and the workplace	<input type="checkbox"/> revise training opportunities to maximize a balanced offering
9. Voluntary participation of workers, whenever possible	<input type="checkbox"/> assess the benefits and risks of mandating training to workers	<input type="checkbox"/> make participation in training voluntary, where possible <input type="checkbox"/> use mandated training with discretion, considering benefits and risks	<input type="checkbox"/> track worker enrollment and success against skill gains and program goals	<input type="checkbox"/> revise mandatory training policies, where needed

(continued on next page)

Table 11
Incorporating Design Elements in the PDCA Cycle (*cont'd*)

Program design	Stage 1: Plan	Stage 2: Do	Stage 3: Check	Stage 4: Act
10. Worker involvement in training design, implementation, and evaluation	<input type="checkbox"/> consult workers for learning needs they see in their daily work	<input type="checkbox"/> incorporate skills relevant to workers' jobs in training, as appropriate	<input type="checkbox"/> include worker feedback on training during the program evaluation process	<input type="checkbox"/> revise training content or delivery
11. Multiple learning strategies	<input type="checkbox"/> consider learning needs, content, and delivery	<input type="checkbox"/> design, develop, and offer a variety of learning strategies, as appropriate	<input type="checkbox"/> include feedback on usefulness in evaluation process	<input type="checkbox"/> promote availability and benefits
12. Training provider selection and evaluation	<input type="checkbox"/> consider learning needs of workers and workplaces	<input type="checkbox"/> match training provider, content, and delivery with learning needs	<input type="checkbox"/> consider learning needs and goals against actual skills gains	<input type="checkbox"/> revise training content or delivery

Source: The Conference Board of Canada.

Table 12 presents critical components of JTPs at three major stages of their program life cycle. It provides program planners with a basis for addressing issues and challenges that relate to joint training activities, as they progress and become more complex and ambitious. The tool helps to flag issues and build trust and mutual respect between labor and management, and identifies areas for program refinement and regulation. It will help you make informed decisions that benefit everyone involved.

The three phases in the JTP life cycle are:

- 1. Start-up**—beginning stages, for those starting up a new Joint Training Program
- 2. Ramp-up**—advice on improving an existing Joint Training Program
- 3. Leader and pioneer**—suggestions for Joint Training Programs that already have solid, successful training programs, but wish to go beyond, to make even further progress

The suggested process for incorporating the design elements is:

1. Review Table 12.
2. Identify the phase at which your JTP is in its life cycle.
3. Identify at which stage you are, in the PDCA cycle.
4. Review the content of the box connecting your JTP phase and PDCA stage carefully.
 - Each box contains one or more actions that will help guide you in making informed decisions about your JTP.

5. Check (✓) which of the actions in each box are relevant to your program.
 - The checklist of actions is not exclusive or exhaustive. Some developers will need to add other actions at each stage; others may choose not to apply some of the suggested actions. However, it is recommended that developers consider each suggestion for possible inclusion in their plans.
6. For each relevant action you check, consider the method and resources required to implement.
7. Discuss, as appropriate, with partners, to adjust plans and take action.

NEXT STEPS

This report is a first step towards sustaining and improving workforce development initiatives, based on joint labor–management collaboration. Understanding, recognizing, and promoting the contribution that Joint Training Programs make toward upgrading the skills of the workforce is a key to their ongoing success. Future steps to assist them in making further and better contributions will be vital to the ongoing success of many organizations and individuals. Building even better JTPs will require further research and analysis to expand and enhance current knowledge, and to provide unions and management with the full range of tools they need to heighten the impact of their programs.

Table 12
Connecting the PDCA Cycle to the JTP Life Cycle

JTP Life Cycle Phase	Stage 1: Plan	Stage 2: Do	Stage 3: Check	Stage 4: Act
Start-up (beginning)	<ul style="list-style-type: none"> <input type="checkbox"/> Hold regular consultations between labor and management <input type="checkbox"/> Agree on skills upgrading goals for individuals and organizations <input type="checkbox"/> Conduct learning needs analysis of workers and workplaces 	<ul style="list-style-type: none"> <input type="checkbox"/> Labor and management share decisions regarding: <ul style="list-style-type: none"> <input type="checkbox"/> funding <input type="checkbox"/> marketing <input type="checkbox"/> content <input type="checkbox"/> delivery <input type="checkbox"/> evaluation of training 	<ul style="list-style-type: none"> <input type="checkbox"/> Review training goals against actual outcomes 	<ul style="list-style-type: none"> <input type="checkbox"/> Labor and management solve issues, as they arise, by mutual agreement <input type="checkbox"/> Adjust skills upgrading goals, training content, delivery, and evaluation, as needed
Ramp-up (improving)	<ul style="list-style-type: none"> <input type="checkbox"/> Align learning needs of workers as individuals with those of the workplace <input type="checkbox"/> Focus on building key program design elements into program 	<ul style="list-style-type: none"> <input type="checkbox"/> Design training programs that meet the learning needs of workers' career paths and of their employer organizations <input type="checkbox"/> Build measures of training impacts into design process <input type="checkbox"/> Promote programs with incentives of value 	<ul style="list-style-type: none"> <input type="checkbox"/> Monitor measures of training impacts against goals and adjust program elements accordingly 	<ul style="list-style-type: none"> <input type="checkbox"/> Keep labor and management engaged in the process of designing and offering new or improved training programs <input type="checkbox"/> Create opportunities for graduate workers to use their new skills
Leader and pioneer (going beyond)	<ul style="list-style-type: none"> <input type="checkbox"/> Consult with other Joint Training Programs in the same industry and in others to discover best-practice solutions, and apply them 	<ul style="list-style-type: none"> <input type="checkbox"/> Design and implement simple procedures for workers to apply for, and take part in, training <input type="checkbox"/> Tie successful program completion to concrete rewards and incentives for workers, managers, and union representatives 	<ul style="list-style-type: none"> <input type="checkbox"/> Compare existing program elements with best-practice models, and adjust or upgrade, where possible 	<ul style="list-style-type: none"> <input type="checkbox"/> Create clear career path choices and upgraded position opportunities for graduate workers <input type="checkbox"/> Communicate information widely and prominently

Source: The Conference Board of Canada.

One of the best ways to improve on the application of the training to work is to provide employers and unions with practical tools and training to enable them to enhance the impact of programs, improve lines of communication, and take full advantage of employees' skill gains in the workplace. It would be valuable to develop an evaluation tool and process to demonstrate the outcomes and impacts of investment in Joint Training Programs, and to show how their results can best be applied in the work. Similarly, it would be valuable to produce a practical "how-to" manual for workforce development program managers, to help them adapt and replicate successful program components and design elements. Development of these tools and training in their use, in order to heighten organizational capacity, would transform research results into high-impact products.

Other avenues for work include:

- in-depth study of worker, first-line and mid-level management, and union attitudes toward training and skills upgrading; and
- examination of successful incentives to training program participation for workers, management, and unions.

Tools to assist JTPs in the development, delivery, and/or evaluation of worker training initiatives include:

- how-to manuals for starting up, delivering, and evaluating the success of a Joint Training Program;
- marketing and promotional toolkit for employers and unions involved in Joint Training Programs;
- learning needs assessment toolkits for individual workers and employing organizations; and
- independent Web site that includes information, advice, and tools for Joint Training Program administrators and developers.

CONCLUSION

Success by Design

What Works in Workforce Development

Joint Training Programs harness the power of collaboration between unions and management to produce exceptional training results that benefit everyone involved. When designed using the full set of 12 design elements identified in this study, JTPs are a powerful tool for simultaneously building workforce capacity to meet employers' needs and for improving the performance and prospects of individual workers.

This study of successful practices in joint labor–management training programs highlights the benefits of these collaborative programs and explains how and why the design elements make them successful. The Conference Board's research included detailed, in-depth interviews with nine training cohorts from joint labor–management educational programs in the health care, information technology/telecommunications, and hospitality sectors. Use of a multifaceted approach revealed the investment strategies, principal design elements of workplace training and education delivery systems, learning and workplace outcomes, and the resulting economic, organizational, and individual benefits to employers, unions, and workers in a cross-section of industries. This report summarizes the final results.

As people and organizations seek to start or improve Joint Training Programs of their own, they can use this report to identify and articulate what outcomes, benefits, and impacts they stand to gain. More importantly, they can find a blueprint for action, based on the 12 design elements identified, and their relevance to the success of the training programs explained in the body of this report.

While there are many solid, successful Joint Training Programs already in place in the United States and elsewhere, improvements can always be made. The last section of the report articulates options for action to promote the development and delivery of effective Joint Training Programs.

The effort is worth it. Whether starting a Joint Training Program or implementing improvements to an existing program, the great majority of employers and unions who choose to invest, find the benefits far outweigh the costs. For them, well-designed JTPs quickly translate into substantial skill gains and personal advantages for employees and, ultimately, compelling economic performance for their organizations.

APPENDIX A

Glossary of Terms

Collective Bargaining Agreement—any collective bargaining agreement and any extension, modification, or amendment thereof between a union and an employer, requiring that the employer make contributions to the Joint Training Program; it also means written participation agreements between the trustees and any employer to make contributions to the Joint Training Program.

Contributions—the payments required to be made to the Joint Training Program by the employers, pursuant to the applicable collective bargaining agreements, which must be in an amount, or computed by a formula, no less than that provided for in the agreement.

Employee—means a regular, full-time or part-time employee of an employer, on behalf of whom the employer is obligated to make contributions, working in job classifications covered by the collective bargaining agreements.

Employer—each employer who has currently in force, or later executes, a collective bargaining agreement with a union or a participation agreement with the trustees, providing for contributions to the Joint Training Program.

Executive Director—the executive director of the Joint Training Program.

Joint Training Program—the joint labor–management entity responsible for funding, designing, operating, and evaluating an employee training program.

Trust—the agreement and declaration of trust between the employer and union establishing the Joint Training Program, as amended.

Trustees—the Joint Training Program trustees, acting pursuant to the trust.

Union—each union who presently has in force, or later executes, a collective bargaining agreement with an employer, or a participation agreement with the trustees, providing for contributions to the Joint Training Program.

Worker—same as employee.

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