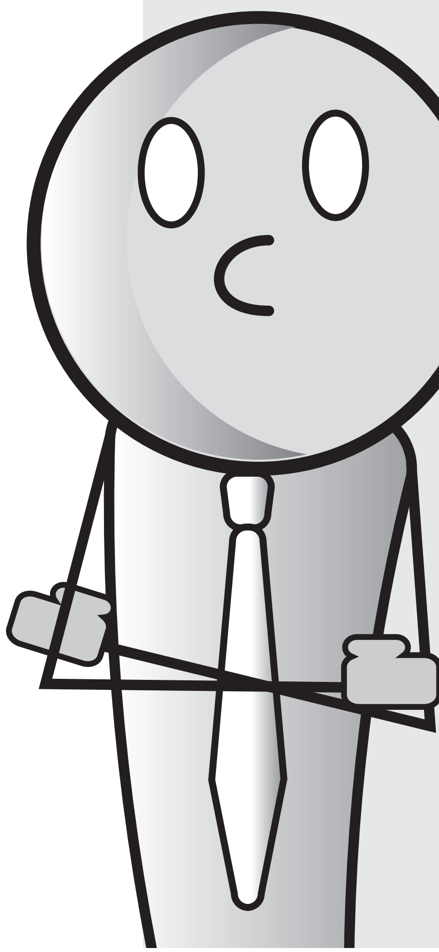
SECTION 4

Tools and Templates



Overview of Templates

This section of the manual provides you with tools and templates to help you work effectively at all the stages of integration. Some tools can be used at each stage while others are more appropriate for a specific stage. Templates best used at a specific stage are noted by a number affiliated with each stage, as shown here :

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

The following templates are included in this section:

1. Sample Policies – For those at Stage 3 (Impact Reflection) or beyond, you may need to create or revise program policies and some samples are provided.

2. Time Audit Template and Tools – At each stage of research integration you will need to build in time for reviewing and reflecting on research related to your area of interest. The time audit can help you track and create time slots to carry out this activity.

3. Take Your Time Template – Once you have completed a time audit and have cleared your schedule for 30-60 minutes every 1-2 weeks, this form can serve as a visual reminder of when to take your time.

4. Support Team Template – If you are at Stage 4 (Preparing for Change) and beyond you should be contacting people who can provide support and resources to you. The support team form allows a quick way to make note of people's names and contact information as you hear about them, even if you aren't quite at the stage to call upon them.

5. Research Review and Evaluation Template – At every stage of research integration you should be reviewing and reflecting on research that is related to your area of interest. The review and evaluation template provides you with a format to make notes about and plan time for reviewing specific resources and research you have accessed. It also allows you to complete a brief evaluation after you have reviewed it that can be shared with others.

6. Information Sharing Template – If you are fully integrating research into practice successfully you are at Stage 6 (Collaboration and Exploration). It is important at this stage to be sharing the results of your work with others. The information sharing form provides a template for you to highlight and easily distribute the information. A completed form can also form part of your files related to program evaluation and continuous improvement performance.

Each of the tools and templates in this section is also found on the CD distributed with this toolkit. This allows you to print and make copies as needed or to complete the information directly on your computer.

As well, some of the tools have been incorporated into *The 3Rs of Research Desktop Planning Tool* though they may be somewhat condensed. This will allow you to keep some plans and information readily accessible and serve as a visible reminder of the actions you want to take.

The tools and templates can be modified to better suit specific practitioner needs.

Policy Samples Template 1

The sample policies provided below will be helpful for those at Stage 3 (Impact Reflection) or beyond. Policies are part of organizational administration for several reasons, including as an aid to program effectiveness. If integrating research results and products into your program is something you want to do effectively, having some guiding policies in place may assist you.

Use at **STAGES** ❸ ❹ ❺ ❻

There are several resources available to literacy practitioners that are designed to ease the challenge of policy development, including *A Collection of Policy and Procedure Template for Adult Literacy Service Providers* (Literacy Link South Central, 1999) and *A Guide for the Development of Policies & Procedures in Ontario's Community Literacy Agencies* (Community Literacy of Ontario, 1999).

While the responsibility for developing, implementing and monitoring policies within an agency may not rest with you as the practitioner, below are some samples of policies related to research for consideration. If this is not an area you have authority in, then pass on the information to the appropriate staff person.

Having a policy in place does not necessarily guarantee compliance, but by stating an expectation in the form of a policy, it can help add weight and importance to it.[7]

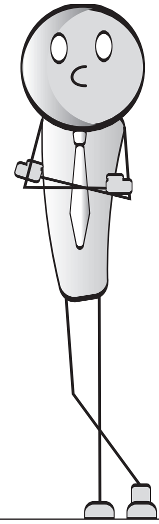
In some cases, the samples below have been provided by LBS managers and practitioners. In other cases, they have been adapted from existing policies. Any policy adopted by an agency will need to be reviewed and possibly amended to make it fit with the templates, vision and organizational structure of the agency.

These are ***samples*** only, meant to provide guidance and stimulate discussion. Check or highlight those that are similar to ones you have in place in your agency already. Make note of others you would like to consider for your agency.

- Our agency will make efforts to initiate and cooperate with research projects, subject to staff resources, client protection and program integrity.
- Training and professional development opportunities are made readily available to staff members.
- Our agency will maintain and/or provide access to a library of current research information and materials related to the goals of the program.
- Staff will be provided a minimum amount of paid time during the course of a year for the purpose of reviewing and reflecting on current research information and materials related to the goals of the program. The amount of time will be detailed in the staff person's contract.
- Our agency values the importance of research as it relates to the field of adult learners. It has guiding principles in place that reflect this value.

[7] *Policies for Volunteer Program,* Volunteer Ontario, Second Edition 1993

Policy Samples



Use at **STAGES** ❸ ❹ ❺ ❻

- Our agency commits a minimum percentage of its annual budget towards purchasing or accessing current research information and materials related to the goals of the program. The amount is set annually subject to funding.

- Our agency has protocols in place related to reviewing, purchasing and filing new research information and materials that have been distributed. Staff are aware of these protocols and they are included as part of the staff orientation package.

- Our agency supports the involvement of practitioners in research collaboration. There is a process in place for staff and management to review all research collaboration opportunities and staff are aware of the process.

- Changes made to the program must be supported by credible research and there must be a plan in place detailing the outcomes, impacts and evaluation procedures for the change. All changes must be supported and approved by agency management.

- Successful changes made to the program must be documented and summarized in brief, clear language briefing papers. These papers are available and accessible to agency management and other literacy agencies as requested.

Time Audit

Template **2**

At each stage of research integration you will need to build in time for reviewing and reflecting on research related to your area of interest. A time audit can help you track and create time slots to carry out this activity.

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

It's natural for literacy practitioners to feel overwhelmed with all the necessary tasks they need to complete in a week. The idea of finding more time to take on additional work such as reviewing and reflecting on research can seem impossible. However, by investing 30-60 minutes a week in research review, it can not only save time in the long run but can also enhance current programming. As noted in many of the strategies found throughout this toolkit, it's recommended that practitioners look at the time they spend in a normal work week and try to identify where they can free up some time. This free time is needed to read and review research, whether it's new research that comes across the desk or research that has been sitting on shelves for years.

Before embarking on a time audit be sure to pick a tracking period that is a close reflection to your normal work week. In other words, don't wait to track your time the week before a program monitoring visit or at the start of a new registration period, when you are likely to be busier than usual. For 1-2 weeks, jot down the activities you have done in the time slots provided. Be brief and don't worry about providing lots of detail. You don't want the time audit to be burdensome and time-consuming!

It's ideal if you can track your time for two weeks, but if that's not feasible, take one week. Once complete, answer the questions on the summary sheet provided. Review the results with other staff and management. See if there are tasks that can be merged with others, moved to a different time, eliminated or delegated to someone else. The goal is to free up 30-60 minutes at least every two weeks. This time can then be used to read, review and reflect on research that may have a place for integration in your program.

Keep in mind that under the Ministry of Training, Colleges and Universities' Continuous Improvement Performance Management System (CIPMS) efficiency is one of the service delivery standards agencies will be monitored on. Copies of your completed time audits can be another document and tool to share with your field consultant during monitoring visits.

••• **Keep in mind, one hour is only about 2% of your weekly work hours!**

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

Time Audit

Tracking Period

Week One

HOURS	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

Time Audit

Tracking Period

Week Two

HOURS	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Time Audit

Summary

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

1. What activities do you spend the most time on during the week?

2. What activities do you spend the least amount of time on?

3. What percentage of your time is spent on activities that are not in your job description?

4. What percentage of your work time is spent on personal activities (answering phone calls, running errands on breaks, etc.)?

5. What percentage of your personal time is spent on work-related activities?

6. Based on the summary, are there times in your work week that can be rearranged, eliminated, modified or delegated to someone else?

7. Can you create a new 30-minute block of time a week (or an hour after two weeks) that can be set aside for reading, reviewing and reflecting on research? If yes, schedule this into the Take Your Time Template from the *The 3Rs of Research toolkit*.

Time Management Tips

There are countless workshops and resources devoted solely to time management.[8] Below are just a few:

...at STAGES ❶ ❷ ❸ ❹ ❺ ❻

1. Identify the best times for your own productivity. If you are a morning person or 'after lunch' person, dedicate this time to complete some of your more demanding tasks that take a lot of energy. You'll work more efficiently if you are working during your peak time.

2. Take on difficult tasks first. If you wait to the end of the day when you have only a few minutes to devote to the task, you may run out of time or energy and end up either staying later than you planned or cutting into time during the next day.

3. Make sure your work environment is conducive to working productively. Cut down on distractions and opportunities for wasting time.

4. Make time during your day for some relaxation. Get up to stretch, leave your workspace and get some fresh air if possible or just move to another location in the office. If you work straight through with no 'free time' then you may tend to feel frustrated and tired and not be able to focus on other tasks that need to be done.

5. In your 'off-work' time make sure you get enough rest, relaxation and nourishment. If you are healthy and rested when you come into work you will have a more productive day.

6. Try to combine activities when possible. For example, when students are working independently on an activity can you do some pre-planning for another session?

7. Throw out unused materials. A good rule of thumb is if you haven't used something in a term, throw it out. Clutter can be distracting.

8. Create a place or space for the materials you use regularly. Keep your workspace organized so you aren't wasting time looking for items you need daily.

9. Use a daily planner. Keep all your "to do" lists there or, keep one calendar handy and write everything on it that you need to accomplish.

10. While waiting for people to show up for appointments or meetings, try to accomplish small tasks such as returning phone calls or checking e-mail.

11. Create a list of program routines and procedures that can be posted or distributed to save time reviewing with each new student, tutor or staff person.

12. Create templates for materials you use regularly.

13. Assign appropriate tasks to students and volunteers such as copying, answering phone calls, greeting new students, filing, etc.

14. Learn to say no, especially if it is to something that is better suited to another person or not part of your job description.

15. Try to consolidate trips to the office supply store, copying room, or other agency locations you find yourself visiting several times in a day or week.

16. When making phone calls, write down the points you want to discuss ahead of time so you can 'get to the point' as well as remember.

17. Before students leave for the day, have them look around their classroom or learning area and pick up any trash, papers, or items on the floor.

18. Don't reinvent the wheel. There are literally thousands of materials, curriculum ideas and lesson plans available through other agencies, support organizations, lending libraries and the Internet.

[8] Adapted from strategies posted for teachers and students on website www.d.umn.edu/kmc/student/loon/acad/strat/time_audit.html from the University of Minnesota Duluth and www.educationoasis.com

Take Your Time

Template **3**

As a practitioner interested in integrating research into practice, **your goal is to free up at least 30-60 minutes every 1-2 weeks.** This time can be used to review research that may have a place for integration in your program. Follow the steps below:

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

1. Complete a time audit. Use the template included in this toolkit or something similar to see how and where you can free up time.

2. Review the time management tips also included in the toolkit (Section 4) to help you free up time.

3. Once you have allotted a 30-60 minute time frame for reviewing research resources, write it down in the space provided here.

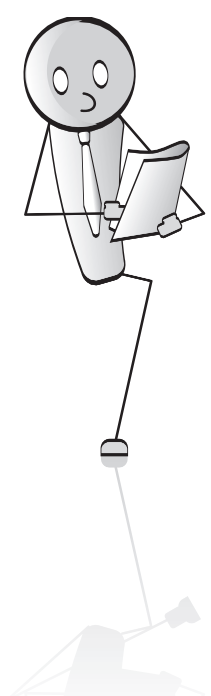
   During my research review time,
   I will attempt to:

   - ✓ *Not answer the phone*
   - ✓ *Not check e-mail*
   - ✓ *Not chat with co-workers or program participants*
   - ✓ *Not catch up with other work*

REMEMBER
This only represents about **2%** *of your workweek. Invest the time now in research review and results will pay off later!*

My time for reviewing research resources is:

- Day of week: ______________________
- Time slot: ________________________
- Next review date: __________________



••• This template can also be found on ***The 3Rs of Research Desktop Planning Tool*** and the CD distributed as part of this toolkit.

Support Team

Template **4**

If you are at Stage 4 (Preparing for Change) of research integration or beyond you should be contacting people who can provide support and resources to you. Having supportive stakeholders involved in your research and integration plans will help with program success.

Use at **STAGES** ❹ ❺ ❻

The support team form allows a quick way to make note of people's names and contact information as you hear about them, even if you aren't quite at the stage to call upon them. Once you have identified your program's area of interest and know the research direction you want to move in, use this form or the one provided on *The 3Rs of Research Desktop Planning Tool* to jot down names of people and key stakeholders who you can connect with.

Potential Support Team Member	Contact Information	How did you hear about this person?	What can this person's role be? What is this person's expertise or skill?
Example: ***Stephanie Ellis***	***555-4132*** ***steph@email.ca***	***She works at another literacy agency that is part of our LSP.***	***Can consult with her about similar work she has done. Potential partner on a pilot project related to our research integration work.***

Your regional and/or sectoral networks are good contacts for suggesting people who can be part of your support team and may even be potential members of your team!

Regional Network Staff	Contact Information	Sectoral Newtork Staff	Contact Information	Umbrella Stream Staff	Contact Information

Research Review and Evaluation Template 5

At every stage of research integration you should be reviewing and reflecting on research that is related to your area of interest. Practitioners may have access to a lot of great research material and products but often ask, *"What do I do with the research when I get it?"*

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

Refer to the guidelines below and then use the notepad on the next page or the detachable sheets on the back of *The 3Rs of Research Desktop Planning Tool* when reviewing research and resources related to your area of interest. This can be applied to new research materials or materials you have received in the past.

Guidelines for Using the Tool

Step 1

- This is meant to be a quick scan of the resource/research, not a review. It shouldn't take more than a few minutes to find the information you need. What is the main focus of this research? Usually a quick scan of the title or introduction tells you the theme of the information or product.
- Determine if this research seems to link to your area(s) of interest. Refer to the information you have recorded in the *Reflective Planning Sheets* (Section 2 of the toolkit) for details about your area of interest.
- If the research doesn't link to your area of interest, pass it on, either to your agency's resource area or to someone else who may be interested.
- If the research does match your area of interest, move on to the next step.

Step 2

- When you are reading to do the initial review of the resource, based on the date you have noted in Step 1, write the date of this review on the sheet that has previously been attached to the resource.
- Based on your initial review, write down any ideas that stand out, that you like, even if they may end up not being feasible down the road.
- Make note of any further follow-up you may need to do such as spend more time reviewing, getting more information from the researcher, or seeking out an executive summary of the research if available.
- If you are using the *Reflective Planning Sheets* from the toolkit (Section 2) you may want to make note of the resource on the appropriate charts, the ideas that it has generated and follow-up activities you want to pursue.
- Keep in mind this is a first initial review and not meant to be in-depth. Save that for follow up if applicable. If your pile of resources you have flagged for initial review gets to have more than three different resources, consider reassessing the resources or make more time in your schedule.
- If you have noted more review time is needed as part of the follow-up, put the resource back to your original pile until you are done with it.

Step 3

- After your initial review and any follow-up is done, provide a ranking of the research/resource. This can be used as evidence of your review process, but also serves as a brief evaluation of the resource that can be shared with others.
- If your ranking shows this particular resource is not useful or applicable to you or your program, remove the attached note from the resource. Pass the research on to your agency's resource area or someone else who may be interested. File the completed notepad with other documents related to your program's evaluation and monitoring. This is evidence of effectiveness and work you have done to reflect on your program's needs.

Research Review and Evaluation Notepad

Use these sheets when reviewing research information and products related to your program's **area of interest.**

Fill in information and **attach to the resource** to help guide your reflective planning processes.

When finished with the resource, **file the completed notepad sheets with other documents** you use as evidence of your program planning and effectiveness.

Step 1 If this research relates to a program area of interest, complete this box, attach to the resource and file in a specific area for future review.

Resource title

Program area of interest this research relates to

Today's date

Date/time you review and reflect on the research

Step 2 Complete the information below after your review of the research resource.

Date of review

Ideas for program integration from this resource

Follow-up you are planning related to this research

Step 3 Rank the usefulness of this research

As it relates to your **program's area of interest**, this resource/research was:

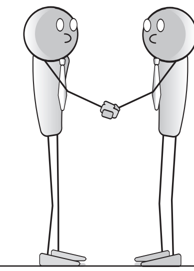
- Very useful
- Somewhat useful
- Not useful at all
- Not applicable

In terms of **providing program integration strategies**, this resource/research was:

- Very useful
- Somewhat useful
- Not useful at all
- Not applicable

Use at **STAGES** ❶ ❷ ❸ ❹ ❺ ❻

If you are fully integrating research into practice successfully you are at Stage 6 (Collaboration and Exploration). It is important at this stage to be sharing the results of your work with others. The information sharing form provides a template for you to highlight and easily distribute the information. A completed form can also form part of your files related to program evaluation and continuous improvement performance.

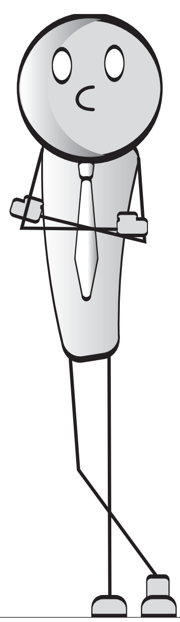


Use at **STAGE** ❻

Points to consider when completing the template

- ✓ Keep summary brief and clear.
- ✓ Share with other practitioners, agencies, support network organizations and funders.
- ✓ Distribute summaries at agency meetings, Literacy Service Planning (LSP) meetings, conferences and other networking events.
- ✓ Consider submitting to research journals, newsletters and relevant websites.

A completed summary can also serve as a key evaluation tool. Keep copies filed and accessible to share with managers, Board of Directors and MTCU field consultants as evidence of your program's effectiveness.



• • • If you are not at the stage of sharing information with other agencies, be sure to check with them to see if they have completed forms highlighting work they have done.

Information Sharing

What Successful Research Integration Looks Like in Our Agency

Agency Name: ______________________

Agency Sector/Stream: ______________________

1. What area of your program did you make changes to and integrate new practices as a result of reviewing and reflecting on relevant research?

- Program Curriculum
- Assessment
- Program Planning
- Learner Recruitment
- Learner Retention and Motivation
- Program Policies
- Practitioner Support/Professional Development
- Program Evaluation
- Other: ______________________

Briefly describe what prompted you to make the changes and describe the changes that were made:

____

____

____

____

____

____

2. How did you access research materials and products that you reviewed and utilized during the integration process (include websites, publishers, titles, etc.)?

- Existing resources we had in our agency library
- Online through internet searches and litserv sites
- Through a support organization such as AlphaPlus, regional network, etc.
- Through information sharing at networking events, LSP meetings, conferences, etc.
- Other: ______________________

List any specific research materials, reports, websites and products that were reviewed and referenced:

____

____

____

____

____

____

3. **Who worked with you from your agency to assist with the change and provide ongoing support?**

- Manager/Coordinator
- Other practitioners
- Volunteer tutors
- Board of Directors/Committees
- Learners
- Other: ____________________

4. **What external stakeholders and organizations were helpful in the process?**

- Other LBS agencies
- Members of Literacy Service Planning Committee
- Community agencies from other sectors (health care, employment-readiness, social services)
- Regional support organizations
- Provincial/National organizations
- Other: ____________________

Provide specific agency names and contact information if possible:

5. **What were some of the challenges and barriers you faced during the integration process?**

- Time
- Support/interest from others in agency
- Research results and information was hard to understand and read through
- Funding/other resources
- Staff experience and expertise
- Identifying outcomes and evaluation criteria
- Finding enough credible research, testimonials and evidence
- Other: ____________________

Describe how you overcame these challenges:

6. What strategies did you apply to help integrate the research into practice?

- A lead person was appointed to take the lead in reviewing relevant research
- Agency staff participated in research circles and other networking opportunities with peers
- Agency staff attended training and other professional development related to research information and products
- Agency staff used some of their own personal time to read and reflect on research information and products
- Experts and key stakeholders were invited to come to visit and share information related to relevant research information and products
- Learners from our agency were involved in reviewing research and recommending changes
- Our agency has in place (or developed new) policies and protocols related to reviewing research and related products
- Other: ______________________________

7. Describe successful impacts the change has made to your program:

- Increased learner attendance and motivation
- Increased learner enrollment
- Increased learner goal achievement
- Increased volunteer involvement
- Increased staff productivity and motivation
- Increased awareness and visibility in community
- Increased partners and external stakeholder involvement in agency
- Other: ______________________________

8. How much estimated time did you and members of your support team devote to the integration process, including reviewing new and existing research, evaluating and documenting information?

- Daily number of hours: ____________
- Weekly number of hours: ____________
- Monthly number of hours: ____________
- Annual number of hours: ____________

What was the timeline from start to finish from when you first accessed and read the research until you successfully implemented changes and were able to evaluate the results?

____

____

____

9. What are your next steps related to this initiative, if any?

____

____

____

____

10. How can someone contact you to get more information?

____

____

____