Comparative Analysis of CLB Benchmarking Methods

Karen Hammond and Tara Holmes

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Government of Alberta
Alberta Employment & Immigration
Acknowledgements

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- Audrey Bonham, Red River College
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- Andrea Strachan, LCRT Consulting

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Finally, we wish to thank the entire team in the Language Training Centre at Red River College, whose pioneering work in CLB benchmarking started us all down the road we are on. Their model has stood the test of time, and provided a firm foundation for the good work that has followed.

Karen Hammond and Tara Holmes
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Executive Summary

Background to the Research

In Canada there are a growing number of sector councils, industry associations, educational institutions, government departments and other organizations who have expressed an interest in describing the language demands of specific occupations or programs, following in the footsteps of a process originally pioneered by Red River College based in Manitoba. A wide range of occupations, trades and professions drawn from numerous sectors has been benchmarked, including occupations in health, manufacturing, construction/trades, engineering, food services, tourism and childcare, to name a few. A parallel focus has been benchmarking applied college programs. While each project has furthered the field and informed the practice of occupational language benchmarking, there is no single source of information describing and comparing these processes, the outcomes achieved and lessons learned.

Alberta Employment & Immigration contracted Hammond & Associates Inc. to develop a comparative analysis of CLB-referenced approaches that have been employed to benchmark occupations and applied college programs in Canada.

Purpose and Objectives

The objectives of the research were:

1. describe key Canadian Language Benchmarking initiatives that have been used to benchmark occupations and occupational training programs in Canada
2. facilitate and document thoughtful reflection by practitioners about their benchmarking projects and key learnings from these projects
3. compare and analyze key occupational benchmarking methods
4. suggest considerations and recommendations for further research, consultation or collaboration to further the practice of occupational benchmarking

The purpose of this project is to develop a comparative analysis of CLB-referenced occupational benchmarking methods that have been used to benchmark occupations and occupational training programs in Canada. The primary intent of this project is to inform the practice of occupational language benchmarking for all who have an interest in analyzing the language demands of an occupation. Shared knowledge, facilitating a discussion with current practitioners and provoking thoughtful reflection of how and why this work is done will help to accomplish this intent. This research will lay the foundation for further consultation to suggest best practices in occupational benchmarking.

Research Process and Comparative Framework

The consultants conducted an environmental scan of benchmarking projects in Canada and approached project owners to obtain copies of reports and any available information.

All benchmarking projects reviewed followed a basic sequence of four steps common to any research process: Planning; Data Collection; Data Analysis and Reporting the Results. The key differences between the approaches taken, then, was not at this
level but within each of these common stages of the research. Projects varied, for example, in the purpose of the research, the degree of stakeholder involvement, the choice of data collection techniques or how the results were presented.

It seemed logical, therefore, to compare these projects within an overall framework of these common stages used in all of the benchmarking projects reviewed, and to explore strategies, challenges and limitations, key learnings and questions for consideration at each stage, as depicted in the following table:

<table>
<thead>
<tr>
<th>CLB Benchmarking Initiatives - Comparative Framework</th>
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<tbody>
<tr>
<td>Stage</td>
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<tr>
<td>-------</td>
</tr>
<tr>
<td>1. Clarify the Purpose</td>
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<td>2. Project Planning</td>
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<td>3. Data Collection</td>
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<td>4. Data Analysis (Assign Benchmarks)</td>
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<tr>
<td>5. Report the Results</td>
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</table>

The consultants developed a data collection tool based on this comparative framework and interviewed lead consultants from all projects. Seventeen benchmarking initiatives conducted between the years of 1999 (when the CLB was still a working document) and 2010 and which were publicly available for examination were reviewed for this research. These initiatives resulted in benchmarking of 76 occupations, trades or professions and 92 college programs in Canada. Some of these initiatives are processes that have been and continue to be applied to multiple contexts; others are projects that apply to only one context.

**Results of the Research**

Strategies, challenges or limitations, key learnings and questions for further discussion are explored in detail throughout the report. Researchers also noted a wide range of benefits and outcomes from CLB benchmarking initiatives.

**Recommendations**

The report concludes with five main recommendations, presented in order of priority:

1. Practitioner’s Forum

There was a sense that each of the individuals or groups we interviewed are working in isolation, with little opportunity to talk to/learn from others. With interest in this practice growing and the types of applications becoming more “high stakes” in nature, it is time to establish some kind of multi-day forum to bring practitioners together...

---

1 The researchers were aware of some important studies with innovative approaches to occupational benchmarking, but were limited to research that was publicly available.
Comparative Analysis of CLB-Referenced Benchmarking Methods

together. Any of the issues identified for further discussion under each stage of a benchmarking process could be considered as topics of discussion at such a forum, and this meeting would likely be a necessary starting point to the other four recommendations that follow. Issues that might be considered at this forum include:

• Ethical and Legal Considerations
  1. Is the CLB framework itself appropriate for such a high stakes purpose as establishing entry requirements to a profession?
  2. What are ‘valid’ or ethical and inappropriate (unethical) purposes for a benchmarking project?
  3. What are the legal implications of this type of benchmarking work?
  4. What are the ethical considerations of doing language proficiency assessments as part of a benchmarking process?
  5. Should anyone be allowed to do this work? Should there be training or qualifications of some kind for benchmarkers?

• Design Considerations
  1. How much/what type of information is sufficient to be able to say with confidence that these are the language demands of the occupation?
  2. What guidelines might be appropriate for estimating time and budget for a benchmarking project?
  3. Benchmarking experts generally stress the importance of triangulation – many sources of data. However, clients may insist on limiting data collection to save time/money. How to respond?

• Data Analysis Considerations
  1. To what extent does using the CLB competency framework as a lens through which to categorize and analyze academic and occupational tasks limit what we observe? Are there some ways to use the framework in our data collection and analysis that are better than others?
  2. How and to what extent should members of the occupational group being studied be involved in determining the language proficiency that is ‘adequate’ for the job?
  3. Should a field expert review of authentic language samples to suggest what is “good enough” performance be part of benchmarking projects?
  4. Is there a way to better relate readability analysis to the CLB Reading Benchmark descriptors? Which readability measures are most appropriate for use with academic or occupational text?
  5. Should analysis of the contextual factors that influence the language demands of an occupation or program become a standard component of the benchmarking process?
  6. Should there be some practices or minimum standards for analysis? E.g., a minimum of two people to arrive at the benchmarks?
Recommendation #2: Best Practices for Benchmarking

Key learnings suggested by researchers often focused on what is best, appropriate or advisable for a benchmarking project. The question of guidelines applies to all phases of a benchmarking process, as well as to the people conducting the research. Are there ‘best’ practices? Are there things that should always be done or never be done as part of benchmarking? Is there latitude for certain choices in a benchmarking initiative? This research suggests that the answer is yes, and that there is a need to define these to ensure good and ethical practice.

Recommendation #3: Practitioner Training

Practitioners identified a core set of skills or expertise that anyone doing this research should have. At the same time, many identified the ‘capacity’ of qualified researchers as a certain limitation for doing this kind of work. From time to time, training sessions/workshops have been conducted by various organizations, including the CCLB, Red River College and Vancouver Community College, for specific clients and projects. However, there is currently no ongoing, accessible training program in Canada that provides an overview of different approaches to benchmarking and the basic skills and knowledge to do a benchmarking project. If the trend towards more benchmarking and wider applications of the process continues, more individuals will need to be trained and ready to do this work well. This report could be the first step in a needs analysis to create such training that is accessible and affordable for researchers.

Recommendation #4: Sharing what we Know and Learn

Many of the researchers identified key learnings from each project. This reflective learning is admirable but limited, if it is never shared, and if practitioners are limited to their own experiences. Much could be gained by sharing of reports, lessons learned, successes and failures. However, it is often the case that reports are not made public, and client confidentiality prohibits consultants from sharing anything more than basic information. What responsibility do we have for informing the field through our research? If projects are publicly funded, how can other stakeholders (practitioners, trainers and related occupations/industries) benefit from this research? Options should be considered for a means of sharing information within these constraints – through a forum, an online chat room or discussion group, for example.

Recommendation #5: Further Research

Further research and development is needed in several key areas related to benchmarking initiatives:

- Longitudinal research to determine the effectiveness of the CLB framework for high stakes purposes such as occupational benchmarking
- Research into if and how communicative proficiency increases in a workplace or applied program context. As one researcher put it, “We have this assumption that people are building language as they go through an applied program or the workplace – we don’t know if this is true and how much.” Without formal and ongoing tracking, this assumption is difficult to validate.
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- Research into correlating tests to the CLB – either occupation-specific tests or language proficiency tests. Research has been done in this area by the CCLB, Red River College and LCRT Consulting. While this application of benchmarking was out of scope for this project, it is an area of growing interest, and a comparative analysis of the processes and issues inherent in that kind of work would be beneficial.

- Research to develop language proficiency assessment tools that are better suited to workplace applications

Background to the Research

In Canada there are a growing number of sector councils, industry associations, educational institutions and organizations who have expressed an interest in describing the language demands of specific occupations, following in the footsteps of a process originally pioneered by Red River College based in Manitoba. A wide range of occupations, trades and professions drawn from numerous sectors has been benchmarked, including occupations in health, manufacturing, construction/trades, engineering, food services, tourism and childcare, to name a few. A parallel focus has been benchmarking college programs that feed into these occupations. While each project has furthered the field and informed the practice of occupational language benchmarking, there is no single source of information describing and comparing these processes, the outcomes achieved and lessons learned.

Alberta Employment & Immigration contracted Hammond & Associates Inc. to develop a comparative analysis of CLB-referenced occupational benchmarking methods that have been employed to benchmark occupations and occupational training programs in Canada.

Purpose and Intended Outcomes

The purpose of this project is to develop a comparative analysis of CLB-referenced occupational benchmarking methods that have been used to benchmark occupations and occupational training programs in Canada. The primary intent of this project is to inform the practice of occupational language benchmarking for all who have an interest in analyzing the language demands of an occupation. Shared knowledge, facilitating a discussion with current practitioners and provoking thoughtful reflection of how and why this work is done will help to accomplish this intent. This research will lay the foundation for further consultation to suggest best practices in occupational benchmarking.

In addition to meeting this fundamental need, this research will also describe some of the benefits that may result from these projects. Informal conversations with those who have been involved in benchmarking projects often include references to such outcomes. For example, benchmarking a program may lead to collaboration with content area instructors in an institution. Benchmarking an occupation may lead to identification of supports that could be introduced to the workplace to ease the language overload for employees. Sharing and documenting these unexpected benefits may assist in more strategic planning of future initiatives.

2 Centre for Canadian Language Benchmarks (2002)
This research and the final report documenting the results of the research will be of use to all stakeholders who have an interest in benchmarking the language demands of an occupation or occupation-related programming. Stakeholders include: ESL program providers; regulatory bodies; employers; government funders; policy makers; industry associations or sector councils; educational institutions; the Centre for Canadian Language Benchmarks and individuals or groups who take on the task of occupational benchmarking.

**Objectives**

The objectives of this study were to:

1. describe key Canadian Language Benchmarking initiatives that have been used to benchmark occupations and occupational training programs in Canada
2. facilitate and document thoughtful reflection by practitioners about their benchmarking projects and key learnings from these projects
3. compare and analyze key occupational benchmarking methods
4. suggest considerations and recommendations for further research, consultation or collaboration to further the practice of occupational benchmarking

**Research Process**

The following steps and activities were undertaken as part of this research:

1. Reviewing presentations and outcomes of a Benchmarking symposium of CLB experts conducted at the TESL Canada Conference in Banff on October 1st – 3rd, 2009. The focus of this session was to describe selected benchmarking initiatives that have occurred across the country.

2. Identifying important projects and contacting organizations and key contacts for benchmarking initiatives in Canada.

3. Approaching key contacts at each organization to request copies of written reports or referral to online descriptions of their benchmarking initiatives.

4. Reviewing of all written reports and presentations.

5. Developing a framework for describing and comparing initiatives and recording data from each program using that comparative framework. (See Appendix 1 for a copy of the data collection template)

6. Interviewing all project leaders to confirm and expand on the information gleaned from available documentation and to seek their reflections on the process and the outcomes, limitations, challenges and lessons learned.

7. Analyzing the results of the research and prepare a draft report that includes consultant observations and considerations for further action to inform best practices.
8. Peer review of the draft report by selected practitioners who participated in the project.

9. Preparing the final report.

**A Short History of Benchmarking in Canada**

The Canadian Language Benchmarks (CLB) are the national standard used in Canada for describing, measuring and recognizing the second language proficiency of adult immigrants and prospective immigrants for living and working in Canada. The Centre for Canadian Language Benchmarks (CCLB) promotes and supports the recognition and use of the CLB and the *Niveaux de compétence linguistique canadiens* (NCLC) as a practical, fair and reliable national standard of second language proficiency in educational, training, community and workplace settings. *(Note: this study will focus only on the CLB (English benchmarks) and projects relating to benchmarking in English.)*

The CLB provide a descriptive scale of communicative proficiency in English as a Second Language, expressed as twelve benchmarks or levels. They cover four skill areas: reading, writing, speaking and listening, and each benchmark is a description of the person’s ability to use the English language to accomplish real life tasks.

The current version of the Benchmarks, the CLB 2000, was preceded by the CLB Working Document published in 1996. At the time of this report, the CLB is undergoing a further revision which will result in the CLB 2010.

Red River College (RRC) was the first organization in Canada to profile the language demands of an occupation using the CLB framework. As early as 1999, researchers at the Language Training Centre at RRC were benchmarking the language demands of college programs and occupations using the CLB Working Document and the CLB 2000. Since then, RRC has benchmarked 32 college programs, 8 occupations/professions and trades in Manitoba and 7 occupations and trades as part of national initiatives.

The CCLB initiated the first national benchmarking project, *Benchmarking the English Language Demands of the Nursing Profession Across Canada*, conducted for the CCLB by Red River College in 2002.

Many other colleges, government agencies and consulting groups have benchmarked a range of programs, occupations and assessments. The chart on pages 10 to 15 presents an overview of projects identified in the course of this research.
Key Terms of Reference

For the purposes of this report, the following terms are defined as follows:

- **authentic materials** - materials actually used by workers or students to perform role-specific tasks, as opposed to simulated materials. Examples for workers include forms, notices, tables, graphs, brochures, memos, manuals and blueprints and for students, textbooks, course calendars and class handouts.

- **benchmarking** - the process of analyzing the English language demands (reading, writing, speaking and listening) of an occupation (or trade, profession, etc.), a program (e.g. a college course), a process (e.g., certification) a task (e.g., giving instructions to a co-worker) or an examination (reading demands only) in reference to the Canadian Language Benchmarks.

- **Canadian Language Benchmarks** - a national standard and descriptive scale of communicative proficiency in English as a Second Language (ESL) expressed as 12 benchmarks or reference points

- **English language proficiency** - communicative ability expressed as four integrated skills: speaking, listening, reading and writing

- **ESL** - English as a Second Language; a.k.a. EAL (English as an Additional Language)

- **L1 or L2** - a short form sometimes used to refer to a first language speaker of English (L1) or second language speaker of English (L2)

- **method** - the approach used to do something; a means or manner of procedure; a systematic way of accomplishing something; in this report also known as process or approach

- **PLA** - prior learning assessment, a process that helps adults to demonstrate and obtain recognition for prior learning that is relevant to a program of study or credential.

- **project owner(s)** - the group, organization or agency that commissions the benchmarking project and owns the results of the research

- **project consultants** - the group, organization or agency that conducts the research on behalf of the project owners. Referred to as consultants, practitioners or researchers in this report, these individuals may be self-employed, part of a larger consulting group or internal consultants, as in members of a training unit in a college or union.

- **S/ L/ R/ W** - speaking, listening, reading and writing – the four language skills included in the CLB Framework

- **stakeholders** - people with a vested interest in the outcomes of the research

- **subject matter experts (SMEs)** - people who have expertise in the occupation or program being reviewed. SMEs may or may not be stakeholders and they may be internal or external to participating organizations. For example, someone from an immigrant serving agency may not be considered a stakeholder in one project but they may be able to offer expertise in issues that are material to the research.
Review of Benchmarking Initiatives

Seventeen benchmarking initiatives conducted between the years of 1999 (when the CLB was still a working document) and 2010 and which were publicly available for examination were reviewed for this research\(^3\). Some of these projects were entirely focused on benchmarking, others had a significant benchmarking component. For ease of reference, they are all referred to as benchmarking projects or benchmarking initiatives.

These initiatives resulted in benchmarking of 76 occupations, trades or professions and 92 college programs in Canada. These initiatives span a wide range of work contexts, including medical/health professions (e.g., nursing, occupational therapy and physiotherapy, medical laboratory technology, midwifery), engineering, manufacturing, food service, food processing, construction, information technology, biotechnology, accounting, education and childcare. Some of these initiatives are processes that have been and continue to be applied to multiple contexts; others are projects that apply to only one context.

Table #1 on the following pages presents an overview of all projects, presented in alphabetical order by the project owner.

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\(^3\) The researchers were aware of other studies with innovative approaches to occupational benchmarking, but were limited to research that was publicly available.
### Table #1: Benchmarking Initiatives Reviewed

<table>
<thead>
<tr>
<th>Project Owner/Consultants</th>
<th>Title</th>
<th>Description</th>
<th>Timeframe</th>
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<tbody>
<tr>
<td><strong>Alberta Employment &amp; Immigration (AEI)</strong></td>
<td><strong>Analyzing the Language Demands of Occupations: A Guidebook</strong></td>
<td>This guidebook describes a process and provides tools and templates for analyzing the language demands of an occupation. It was based on three pilots of the method conducted in Alberta with labourers in food processing, construction labourers and food service counter attendants. The process included interviews, observations, job shadowing, analysis of authentic workplace materials and examination of contextual factors that influence communication, including intercultural competence, English language instruction and workplace supports.</td>
<td>2007 - 2010</td>
</tr>
<tr>
<td>Project Consultants:</td>
<td></td>
<td>* For the purposes of brevity, each project will be referred to in the report by one acronym or abbreviation. This one will be referred to as the ALDO process.</td>
<td></td>
</tr>
<tr>
<td>Hammond &amp; Associates Inc. (Karen Hammond, Tara Holmes, Paul Holmes, Lorene Anderson, Dawn Seabrook de Vargas)</td>
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<td><strong>Bow Valley College (BVC)</strong></td>
<td><strong>Benchmarking Career Programs</strong></td>
<td>Based on the method prescribed in the VCC-Training Kit, this process defined the English language proficiencies required of English language learners (ELL) for entry into and success in career programs at community colleges. Nine programs have been benchmarked at BVC using this approach.</td>
<td>2005 - 2009</td>
</tr>
<tr>
<td>Project Consultants:</td>
<td></td>
<td>* Referred to in this report as the BVC process</td>
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<tr>
<td>Keltie Coad, Megan Taillon, Gare Myers, Gail Kingwell, Shelley McConnell, Hana Imai, Grant Sorensen, Megan Taillon</td>
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## Comparative Analysis of CLB-Referenced Benchmarking Methods

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<th>Project Owner/ Consultants</th>
<th>Title</th>
<th>Description</th>
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<tr>
<td><strong>Canadian Society for Medical Laboratory Sciences (CSMLS)</strong></td>
<td>English Language Proficiency and Internationally Educated Medical Laboratory Technologists</td>
<td>The purpose of this project was to investigate and validate the standards of the CSMLS for language proficiency of internationally educated medical laboratory technologists (IEMLTs) who apply to the CSMLS Prior Learning Assessment (PLA) process. The intent was to evaluate the level of language proficiency required to succeed in the medical laboratory workplace and at the various stages of the certification process. The ultimate goal was to identify means of expediting IEMLT progress through the PLA process and ultimately into the workplace. The project also examined the demands of the CSLMS PLA exam and mapped CLB equivalencies to IELTS, TOEFL and MELA (professional practice) exam scores. The two benchmarking components of this project focused on benchmarking the language proficiency demands of the CSMLS certification examination and benchmarking the communicative demands of medical laboratory practice. Activities included unstructured observations, interviews, analysis of authentic workplace materials and an item analysis of the professional practice exam.</td>
<td>2007 - 2008</td>
</tr>
<tr>
<td><strong>Centre for Canadian Language Benchmarks (CCLB)</strong></td>
<td>Benchmarking the English Language Demands of the Nursing Profession Across Canada</td>
<td>The purpose of this study was to determine the real-life English language demands of the nursing profession in Canada, and to assign appropriate CLB levels to the four skill areas (speaking, listening, reading, and writing). This project laid the foundation for the development of Canadian English Language Benchmark Assessment for Nurses (CELBAN), a proficiency assessment tool for internationally educated nurses to demonstrate threshold competency necessary for licensure as part of requirements for entering the profession in Canada. The process included a survey, interviews, focus groups, observations, collection and review of authentic workplace materials and English language proficiency testing using the CanTEST.</td>
<td>2002</td>
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* Referred to in this report as the CSMLS project

* Referred to in this report as the CCLB-N project
## Table #1: Benchmarking Initiatives Reviewed

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<th>Project Owner/Consultants</th>
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<th>Description</th>
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<tr>
<td><strong>Centre for Canadian Language Benchmarks</strong></td>
<td>Benchmarking Language Demands of Occupational Therapists and Physiotherapists</td>
<td>This project was undertaken to benchmark the language demands of physiotherapists and occupational therapists with the intent of developing an occupation-specific language test. The study resulted in a detailed description of the range of language tasks carried out across work contexts by individuals in the two professions. The approach also yielded a benchmark assignment for each language skill: reading, writing, speaking and listening. The process included observations, interviews, review of authentic workplace materials and a brief survey of stakeholders to confirm research findings.</td>
<td>2010</td>
</tr>
<tr>
<td><strong>Centre for Canadian Language Benchmarks</strong></td>
<td>Occupational Language Analysis (OLA)</td>
<td>An Occupational Language Analysis provides a broad inventory of language competencies developed from two secondary sources of data: an Essential Skills Profile and National Occupational Standards or similar, nationally validated sources of data. OLAs do not define minimum proficiency requirements – they define the full range of S/L/R/W tasks identified within the two source documents, so the range might be, for example, from Speaking CLB 3- 9. To date 33 OLAs have been developed.</td>
<td>2005</td>
</tr>
<tr>
<td><strong>College of Medical Radiation Technologists of Ontario (CMRTO)</strong></td>
<td>College of Medical Radiation Technologists of Ontario English Language Proficiency Project</td>
<td>This project aimed to benchmark the language demands of medical radiation technologists as a basis for setting fair and objective English language standards for internationally educated medical radiation technologists (IEMRTs) seeking professional registration in Ontario. Specifically, the purpose was to set fair and defensible cut scores of language proficiency tests used to demonstrate English language fluency for professional registration. The benchmarking analysis was one source of information about the language demands of the occupation, which was triangulated with other sources, such as a standard setting study, to provide the registration committee with sufficient data to support an entry-to-practice language proficiency standard.</td>
<td>2008 - 2009</td>
</tr>
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* Referred to in this report as the CCLB – OT/P project

* Referred to in this report as the OLA process

* Referred to in this report as the CMRTO project
### Table #1: Benchmarking Initiatives Reviewed

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<tr>
<td><strong>CON*NECT Colleges of Ontario Network for Education and Training</strong></td>
<td>Colleges Integrating Immigrants to Employment (CIITE) - Language Benchmarking at Ontario Colleges</td>
<td>This process was based on the Red River College process for benchmarking college programs and adapted after the first year of implementation. The goal of the CIITE project was to improve the pathways for internationally trained immigrants (ITIs) through the Ontario college system, from pre-entry services through employment transition and into the workforce. As part of this project, a benchmarking pilot was carried out by seven colleges. A total of 39 college programs and pre-post-secondary language courses were benchmarked between January and June 2006.</td>
<td>2006</td>
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<tr>
<td><strong>Edmonton Mennonite Centre for Newcomers (EMCN)</strong></td>
<td>Benchmarking and Teaching Workplace Communications for International Accountants</td>
<td>The purpose of the project was to develop a task inventory as a basis for curriculum development to prepare individuals for work as accounting clerks. This project followed the JALA method defined by Vancouver Community College, with some minor modifications in process (e.g., audio taping of observations).</td>
<td>2010</td>
</tr>
</tbody>
</table>
# Table #1: Benchmarking Initiatives Reviewed

<table>
<thead>
<tr>
<th>Project Owner/Consultants</th>
<th>Title</th>
<th>Description</th>
<th>Timeframe</th>
</tr>
</thead>
</table>
| **Information and Communication Technology Sector**  
  Project Consultants: CCLB (Marianne Kayed; Claude Laurin; Anne Senior; Judith Bond; HRSG; Rachel Anne Hamelin; Jeanine Beauchemin) | Benchmarking the Language Demands of the Software Sector*  
* Referred to as the CCLB-S project | Benchmarking of 14 occupations within two occupational clusters (software and manager-type occupations) is being conducted in French and English as part of a larger project on foreign credential recognition. It will lead to the development of a four-skill online self-assessment and online self study materials for people to improve their English. The process involves analysis of occupational standards and competency profiles and assigning benchmark levels or ranges at the level of occupational cluster, occupation and individual competencies within competency profiles. No observations or job shadowing were possible in this project. The project is not yet completed and the method of analysing the results and what/how will be reported is still being determined. The Sector Council will own the project results and plans to copyright the method used. | 2010 |
| **International Brotherhood of Electrical Workers, Local 424 and the Electrical Contractors Association of Alberta**  
  Project Consultants: Hammond & Associates Inc. (Consultants: Karen Hammond & Tara Holmes; Researcher: Paul Holmes) | Analyzing the Language Demands of Journeyman Electricians*  
• Referred to in the report as the IBEW project | This project will follow the ALDO process and is just in initial planning stages as this report was being produced, so little data is available at this point. The project will analyze the language demands of journeymen electricians working in industrial contexts. | 2010 – 2011 (In progress) |
## Comparative Analysis of CLB-Referenced Benchmarking Methods

### Table #1: Benchmarking Initiatives Reviewed

<table>
<thead>
<tr>
<th>Project Owner/Consultants</th>
<th>Title</th>
<th>Description</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Michener Institute for Applied Health Sciences</strong>&lt;br&gt;Project Consultants: LCRT Consulting (Andrea Strachan, Bruce Russell)</td>
<td>Michener English Language Assessment (MELA)<em>&lt;br&gt;</em>(Referred to in this report as the MELA project)*</td>
<td>The Michener Institute for Applied Health Sciences is a post-secondary educational institution that offers allied health sciences training in Ontario and also bridging programs for internationally trained health science professionals. This project focused on the development of a communicative sector-specific language assessment tool for internationally trained immigrants trying to access professions in health sciences. Three professions were involved: Medical Laboratory Sciences (Medical Laboratory Technology, Diagnostic Cytology), Radiological Technologies (Radiological Technology {X-Ray}, Magnetic Resonance Imaging {MRI}), and Respiratory Therapy. A research component of the project helped to determine the benchmarks of the target language use in these health science professions for the purposes of developing a language assessment and an occupation-specific language curriculum. The process included classroom and worksite observations; review of authentic materials and CLBPT assessment of applicants to the program.</td>
<td>2004 - 2005</td>
</tr>
<tr>
<td><strong>NorQuest College (NQ)</strong></td>
<td>Benchmarking a Bridging Program for Health Care Aides&lt;br&gt;* (Referred to in this report as the NQ project)*</td>
<td>The RRC model was used to set entry and exit benchmarks for a bridging program to the College’s Health Care Aide program. The process included interviews, focus groups, surveys, observation, job shadowing and review of authentic workplace materials.</td>
<td>2003</td>
</tr>
<tr>
<td><strong>Red River College (RRC)</strong></td>
<td>Benchmarking College Programs&lt;br&gt;* Both RRC processes are referred to in this report as the RRC process*</td>
<td>This process looked at language demands of RRC programs and analyzed these demands in four language skill areas in order to identify appropriate entry-level language proficiency recommendations. As of May, 2010, 32 applied programs have been benchmarked at Red River College. The process includes interviews, observations, and review/analysis of authentic workplace materials.</td>
<td>1999</td>
</tr>
</tbody>
</table>
# Comparative Analysis of CLB-Referenced Benchmarking Methods

<table>
<thead>
<tr>
<th>Project Owner/Consultants</th>
<th>Title</th>
<th>Description</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red River College (RRC)</td>
<td>Benchmarking Occupations/Professions</td>
<td>This process is virtually identical to the RRC's method for analyzing the language demands of college programs, with the addition of language proficiency testing of job incumbents. The goal of this process is to identify the language proficiency levels that skilled immigrants will need to function in a particular occupation or profession. To date this process has been applied to benchmark eight professions/occupations in Manitoba as well as two occupations as part of national projects (nursing and midwifery) and 5 trades as part of the CCLB's Red Seal Trades Project.</td>
<td>1999</td>
</tr>
<tr>
<td></td>
<td>* Both RRC processes are referred to in this report as the RRC process</td>
<td></td>
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<tr>
<td>Vancouver Community College (VCC)</td>
<td>Job Activity Language Analysis (JALA)*</td>
<td>A process of benchmarking an occupation for the purposes of curriculum development. Raw data collected through job shadowing is broken down into discreet job activities recorded in a standard template that includes a description of the job activity, verbatim examples of written and oral language observed, an analysis of language tasks, an indication of relevant CLB descriptors and notes on socio-cultural competencies, performance conditions, and curricular considerations. The process includes guided observations, structured interviews, focus groups and collection and review of authentic workplace materials, including readability analyses of selected texts.</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>* Referred to in this report as the JALA process</td>
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<td></td>
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<tr>
<td>Vancouver Community College (VCC)</td>
<td>Training Kit*</td>
<td>The process described in this training kit is based on the Red River College model. In 2004 VCC set a goal of establishing requisite English language competencies for all applied programs at VCC using the CLB. Red River College provided training for a cohort of the ESL faculty in how to benchmark in January 2005. The training and benchmarking experiences of the ESL cohort led to the development of this training kit. The process described serves to analyze the language demands of specific programs in order to identify appropriate entry-level language proficiency recommendations using the CLB 2000. To date 20 VCC college programs have been benchmarked.</td>
<td>2005</td>
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<td></td>
<td>* Referred to in this report as the VCC-TK process</td>
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Framework for Comparing CLB Benchmarking Initiatives

All benchmarking projects reviewed follow a basic sequence of four steps common to any research process: Planning; Data Collection; Data Analysis and Reporting the Results. Red River College was the first group in Canada to apply this approach to a benchmarking initiative in Canada and they differentiated between Data Analysis and Assigning Benchmarks, which they added as an intermediate stage between Data Analysis and Reporting the Results.

The key differences between the approaches taken, then, is not at this level but within each of these common stages of the research. Projects vary, for example, in the purpose of the research, the degree of stakeholder involvement, the choice of data collection techniques or how the results are presented.

It seemed logical, therefore, to compare these projects within an overall framework of these common stages used in all of the benchmarking projects reviewed, and to explore strategies, challenges and limitations, key learnings and questions for consideration at each stage. Table #2 presents the comparative framework for this research, which adds one important stage at the front end – Clarifying the Purpose of the research – as this step proved to be significant and foundational to all subsequent phases. The findings, too lengthy to be easily captured in a table format, are presented in a narrative format following this summary chart.

Several things should be noted at this point. Firstly, this research does not attempt to evaluate the processes or the outcomes of these initiatives. It simply describes and compares choices made, as a basis for discussion. Secondly, quotes from key contacts and excerpts from various reports have been interspersed throughout to illustrate key points and add interest. While we endeavoured to draw from as many sources as possible, we were limited to reports that were publicly available. Finally, every effort has been made to confirm and clarify our understanding of the details of each project. Any errors or omissions are inadvertent.

<p>| Table #2: CLB Benchmarking Initiatives - Comparative Framework |</p>
<table>
<thead>
<tr>
<th>Stage</th>
<th>Strategies</th>
<th>Challenges or Limitations</th>
<th>Key Learnings</th>
<th>For Further Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Clarify the Purpose</td>
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<tr>
<td>2. Project Planning</td>
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<tr>
<td>3. Data Collection</td>
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<td>4. Data Analysis (Assign Benchmarks)</td>
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<tr>
<td>5. Report the Results</td>
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Stage 1: Clarify the Purpose

A clearly stated and well articulated statement of the purpose(s) of the research is an essential foundation to designing the research process. In some cases these projects began with objectives clearly defined by the project owner, and all the project team needed to do was confirm their understanding of these objectives. In other cases, the purposes of the research were less clear, to the project owners if not the research team.

The strategy at this point is, essentially, communicating: meeting with the project owners to clearly articulate, or in some cases, negotiate, preferably in writing, how the results of the research will and will not be used. This may be an iterative process with the research design phase to a degree: sometimes the desired outcomes are just not feasible given the constraints of time and budget, for example. Nonetheless, both the project owners and the project consultants need to have a shared understanding of the ultimate purposes of this research and how the results will be used.

Common objectives or purposes of analyzing the language demands of an occupation or college program included:

▪ defining minimum standards for entry to a college program
▪ describing the language needed to work safely and competently in an occupation
▪ informing the development an occupation-specific language assessment tool
▪ informing the development of an online self-assessment and self study materials for people to improve their English.
▪ a basis for curriculum or resource development (e.g., developing a bridging program to work or to prepare for entry to a training program)

Additional outcomes defined in the literature included:

▪ evaluating/validating language proficiency requirements previously defined for entry into an occupation or a college program
▪ recommending appropriate levels of language proficiency for specific steps in a certification/licensure within an occupation
The CSMLS project analyzed language demands at five stages in the certification process for Internationally Educated Medical Laboratory Technologists (MLTs):

- **Step 1**: Getting information about becoming registered: What reading skills are required to review the applications forms and navigate the website and what language skills are required to make the information phone call. The fact that an applicant can get help with this process was considered.

- **Step 2**: Enter a bridging project: what are the language requirements of the bridging programs for MLTs?

- **Step 3**: Language proficiency requirements: What are the current language requirements for the CSMLS Prior Learning Assessment?

- **Step 4**: Professional practice examination: What are the benchmarks required to handle this exam?

- **Step 5**: Clinical placements: What are the language abilities required for the workplace?

- facilitating access and integration of internationally-educated workers into study and work

- providing employers, HR specialists and other stakeholders (e.g., unions, professional associations, credentialing bodies) with an accurate picture of the language demands of the occupation as a foundation for, for example, enhanced job descriptions; recruitment/retention, orientation and professional development.

- assisting job-seekers to understand the language demands of the occupation or program, to evaluate their readiness to enter that occupation or program and to prepare accordingly

- modifying non-language training (e.g., technical or soft-skills training in an applied area)

- attracting potential learners from other ESL programs in the city or province to benchmarked college programs

- renewing or revising content or language demands of existing college programs

- aligning CLB levels to other language proficiency assessment instruments and descriptive scales

- as part of an articulation agreement to allow graduates of a bridging program to “ladder up” to another program without writing the entrance exam

- providing funding agencies, administrators, ESL instructors and applied area instructors with insight into the language demands of applied programs

- providing regulatory bodies and policy analysts with valuable information for setting policy and standards
The purpose of the Nursing project was to determine the real-life English language demands of the nursing profession in Canada, and to assign appropriate Canadian Language Benchmark (CLB) levels to the four skill areas (speaking, listening, reading, and writing). However, subsequently the CCLB planned to pursue Phase II, which would involve the development of a CLB task-based assessment instrument for nursing, as an alternative to commonly used language tests that merely evaluate a candidate’s language proficiency for academic study. Therefore, the researchers needed to gather a significant amount of data, in order to accomplish both outcomes.

Challenges or Limitations

- A number of project team leaders described proposals that were written, submitted and approved without the benefit of benchmarking expertise. This resulted in projects where the budget, timelines or prescribed process did not adequately support the stated objectives. Some consultants described Requests for Proposals that they did not “bid” on for this reason, and then later learned that the project owners were dissatisfied with the results of the research. Others undertook projects developed in this way, and found their choices in process and the results of the research very constrained.

- Sometimes there are unstated objectives for the research that need to be articulated and clarified

- Even if the purpose appears to be clearly stated, it may mean different things to different stakeholders. For example, “benchmarking the language demands of a college program” - Does this mean defining what benchmarks individuals should have to enter the program or what English language proficiency they should be at upon completion of the program? Are these levels of proficiency required or recommended?

Key Learnings

- The design and scope of the research depend squarely on the purpose of the research. If, for example, the results of the benchmarking project will be used to create an occupation-specific language assessment tool, the scope of the research, the extent of the data collection and the need for validation are all substantially greater than benchmarking for the purposes of curriculum development.

- Involve benchmarking specialists at the proposal writing stage, to ensure that reasonable funds and timelines are allocated to meet the objectives of the benchmarking process

- Confirming the purpose of the research may be an iterative process to a degree with the second stage of research design. The project team may begin to define the process and find that the objectives need to be changed or modified based on other factors, such as time, money or stakeholder involvement.

- This stage in the process is often a process of mutual education. The project owners are helping the project team to understand what they want to achieve, and the project team is helping the project owners to understand what are feasible (or perhaps even ethical) objectives.
Comparative Analysis of CLB-Referenced Benchmarking Methods

- It is important that all key stakeholders in the project understand the purpose of the research and what will and will not be achieved through this process. Clearly communicating the purpose throughout the project will assist in managing expectations.

**For Further Discussion**

1. What are ‘valid’ purposes for a benchmarking project?

2. What ethical considerations are important in defining the purpose of a benchmarking initiative?

3. Safety issues are often an impetus for an occupational sector to undertake a benchmarking study. However, it is important not to conflate occupational competency with language proficiency. For example, someone may meet the language proficiency levels determined by the analysis of the language demands but NOT be professionally competent. The reverse is also true. How do we relate the two without equating them or drawing an inappropriate correlation?

4. One of the needs identified by those involved in benchmarking projects is for open sharing of information. Where full reports are kept confidential there is no opportunity for learning from each others’ work. How can consultants approach clients to share some or all of the results?

5. Several researchers commented that benchmarking projects should not be used for ‘gatekeeping’ purposes; they should open up rather than limit opportunities for ESL learners and internationally educated professionals, tradespersons and workers. Clearly, however, many of the projects result in setting entry requirements or creating occupational language tests. Might the practice of benchmarking benefit from further discussion around the inherent tensions in this kind of work?

6. Some researchers questioned if the CLB framework itself is appropriate for such a high stakes purpose as establishing entry requirements to a profession. Should what we are doing be viewed as experimental, requiring longitudinal studies to determine effectiveness and predictive validity?

7. In a recent meeting with a project advisory committee, researchers were asked, “Will the benchmark levels you recommend as being adequate to do this type of work stand up in court?” What are the legal implications of this type of benchmarking work?
Stage 2: Project Planning

Strategies

Common activities at this stage include:

- becoming familiar with context of the occupation or program
- reviewing occupational profile data (e.g., the Essential Skills Profile, National Occupational Standards or the National Occupational Classification)
- clarifying the needs/rationale for this research – why this, why now
- identifying and engaging key stakeholders
- defining the occupation and parameters (e.g., level, type, location of the work)
- defining a representative sample – who will participate in the research
- planning the project design – e.g., defining the mix of data collection strategies
- establishing a team of researchers and assigning resources
- developing a detailed workplan and key milestones
- securing ethics approval, if required (e.g., a requirement for research projects in some contexts, e.g., colleges)

Additional strategies undertaken by some teams at this stage included:

- conducting a literature review of benchmarking methods
- conducting a literature review of target language use (TLU) analysis
- the development and implementation of a formal communication plan
- training the research team
- conducting information sessions for individuals/groups that will be involved in the process

Stakeholder Involvement

All projects noted the importance of identifying and involving stakeholders at this stage. Some reports merely indicated “consult with stakeholders” without suggesting who they were or how they were involved. ‘Consultation’ seemed to take different forms: in some cases this seemed to be essentially identifying and informing stakeholders about the project and gaining their support and perhaps defining recommended strategy or participants in the research. At the other end of the spectrum stakeholders were part of a formally constituted advisory committee that participated both in setting objectives, project design, analyzing the results and reviewing/approving draft reports.

Where stakeholders were described or named, they typically included:

---

4 Some projects are more constrained in the choices they have for project design. The OLA method, for example, defines a standard process regardless of the context.
Comparative Analysis of CLB-Referenced Benchmarking Methods

- employers (in the case of occupational benchmarking) or deans, department chairs or department heads (for college program benchmarking)
- instructors/faculty of college programs
- unions
- regulatory bodies
- professional associations
- funders
- other external stakeholders – such as: immigrant serving agencies; government agencies; occupational health and safety agencies; regulatory bodies; provincial licensing bodies
- other internal stakeholders – such as college personnel working in the areas of support for ESL learners and/or tutorial support, program evaluation, assessment, admissions or international education.

The make up of the Advisory Committee is very important. Having regulators as a partner gave the team the clout needed for a positive response from the sector.

Notable exceptions to the typical list of stakeholders identified for many projects were representatives of the group being studied (i.e., job incumbents for an occupation or students in a college program under review) or employers of graduates of college programs under review. While all initiatives involved these stakeholders in data collection, at the planning stage these individuals or groups were generally not consulted nor identified as stakeholders.

Expertise of the Project Team

All models identified the role of ‘researcher’ and recommended or mandated that a minimum of two researchers collaborate on any research project. Several reports suggested that more than one researcher is required due to the ‘inherent subjectivity’ of this kind of research.

While only four reports described specific roles and accountabilities of team members, the roles of researcher, project manager/coordinator, analyst, writer, key contact (someone from the program or occupation/industry that served as liaison/communicator to the project manager) and administrative support were implied. It often appeared that individuals might play several roles – e.g., the project manager also did some of the research; researchers may also write some or all of the final report.

Skills of project team members were similarly implied more than directly stated in most of the reports reviewed. Suggested expertise of the researchers included: a working knowledge of, or an interest in developing in-depth knowledge about the CLB 2000; working knowledge of the CLB 2000 and the benchmarking process; working knowledge of the CLB and ESL and/or Adult Basic Education; instructors experienced with ESL learners; working knowledge of the occupation and nationally recognized experts in the adult EAL field.
### Qualifications and Expertise of Project Team Members

Researchers who are tasked with analyzing the language demands of an occupation should have:

- **Expert skill, knowledge and judgment in all aspects of the CLB framework**
- **A solid background in applied and preferably workplace-based research and data analysis**
- **Experience in occupational language analysis (e.g., CLB benchmarking of occupations, Occupational Language Analysis development, needs assessment and/or curriculum development for English in the Workplace or English for Specific Purposes)**
- **Strong interpersonal/communication skills and discretion in dealing with an issue that may be contentious for some stakeholders**
- **Proven writing and editing skills**
- **Neutrality – no perceived or potential conflict of interest in defining the outcomes or shaping solutions for the industry/occupation**
- **Specific training, coaching or mentoring in analyzing language demands of an occupation, if available**

Interviews with consultants identified additional skills and expertise to consider, including:

- Knowledge of the profession, occupation or program
- An ability to integrate vast amounts of information and communicate them to a lay audience
- Understanding of the issues related to access to professions and trades (e.g., professional registration processes and/or foreign credential recognition)
- Understanding of the systemic and communication challenges faced by immigrants
- Extensive experience in ESL, including language assessment

Recommended training of researchers, if needed, is suggested in the process defined by several approaches, but only two instituted a formal training program for researchers and only the OLA method mandates this requirement: the CCLB will only recognize Occupational Language Analyses that have been developed by Registered OLA Analysts who have completed a three day training program and developed an OLA under the guidance of a mentor.

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5 Hammond, K. (2011)
It’s really, really important that the researchers are very well grounded in the CLB. All of us had worked in ESL for a long time – you have to understand the higher level benchmarks – you don’t have to have a lot of experience but some would be helpful. At one point there was someone trying to assign benchmarks without this background and it just did not work. It has to be clear that we are professionals and we are the ones that have the skills to carry this out – research expertise is not enough.

- **Time Requirements**

How many hours are required to do a benchmarking project? This question was difficult to answer by all project consultants, who typically responded with one of two comments: “it depends...” and “far more than you think it will”. Some projects were very constrained by budgets and resources that were not ideal; some include hours spent on translations; others include extensive clerical/administration work.

Pressed to suggest even a broad estimate of all hours, including project coordination, research, analysis and writing the final report, answers ranged widely. As several respondents preferred to report this number anonymously, the estimates are presented in the following table without identifying the source, with the exception of the OLA process, identified with permission, as it stands in sharp comparison to the other time estimates.

<table>
<thead>
<tr>
<th>#</th>
<th>Type</th>
<th>Special Considerations</th>
<th>Estimated Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>college program</td>
<td></td>
<td>230</td>
</tr>
<tr>
<td>2</td>
<td>college program</td>
<td></td>
<td>300</td>
</tr>
<tr>
<td>3</td>
<td>college program</td>
<td></td>
<td>397.5</td>
</tr>
<tr>
<td>4</td>
<td>college program</td>
<td></td>
<td>300 - 400</td>
</tr>
<tr>
<td>5</td>
<td>occupational</td>
<td>*OLA process, no original research</td>
<td>60 - 90</td>
</tr>
<tr>
<td>6</td>
<td>occupational</td>
<td></td>
<td>220 - 300</td>
</tr>
<tr>
<td>7</td>
<td>occupational</td>
<td></td>
<td>375</td>
</tr>
<tr>
<td>8</td>
<td>occupational</td>
<td></td>
<td>375</td>
</tr>
<tr>
<td>9</td>
<td>occupational</td>
<td>Provincial scope</td>
<td>750</td>
</tr>
<tr>
<td>10</td>
<td>occupational</td>
<td></td>
<td>1725</td>
</tr>
<tr>
<td>11</td>
<td>occupational</td>
<td>National scope</td>
<td>1800</td>
</tr>
<tr>
<td>12</td>
<td>occupational</td>
<td>National scope</td>
<td>1950</td>
</tr>
<tr>
<td>13</td>
<td>occupational</td>
<td>Includes detailed transcripts of lengthy observations</td>
<td>3000</td>
</tr>
</tbody>
</table>
What span of time should be allocated for completing a benchmarking project? The answer was much more consistent for college program benchmarking projects, which were often completed within the course of one (16 week) semester. Practitioners reported that this is often the only option, as the researchers are typically instructors who are relieved of teaching duties for one semester only.

The time span for occupational benchmarking projects varied widely, from one month for some OLAs, to 4 to 6 months for some of the ALDO pilots and RRC projects and others ranging between 6 and 12 months. Some consultants emphasized the importance of providing a long span of time because this work is not easily or effectively done on a full-time basis. Even if consultants are available to devote full-time hours to the project, project planning and data collection needs to fit around the needs of the employer or program. Moreover, this kind of work requires time for reflection, to sit back and think about what is being uncovered, to do further research or try a different approach than was originally conceived.

It takes a long time to even get into a worksite. We figured out that, on average, from first contact with an employer to “foot on the floor” at the worksite was typically about six weeks.

In comparing these very broad estimates it is important to remember that many of these methods are the proverbial “apples to oranges”. Many differ greatly in context, complexity and outcomes. An OLA, for example, is by far the fastest and least expensive process and by far but yields the least precise result – the inventory of skills does not have a fraction of the contextual detail or samples of spoken or written language contained in a JALA or the level of consultation built into the CCLB-N process. This is not to say that any one model is preferred or deficient – what is appropriate, sufficient and feasible depends on the needs of stakeholders and the intended use of the benchmarking study.

**Challenges and Limitations:**

Project leaders identified a number of inherent challenges and limitations at this stage of a benchmarking project:

- This kind of research is time intensive and requires specialized expertise. Clients or funders may be unwilling or unable to contribute the resources needed to do good work.

- The project design is necessarily constrained by project resources: time, money and people. The ideal number and cross-section of participants in the research may just not be feasible given the project budget, timeframe and who is available to serve on the project team or to participate in the research.

- Considerable time is required “up front” to identify and solicit participation in the research. College benchmarking programs indicated less of a struggle in this regard than did occupational benchmarking initiatives, as the work was often limited to one context (one college and/or department) vs. multiple work contexts and employers. And, for an “internal” benchmarking initiative participation could be more easily gained (or mandated).
Not all models or data collection strategies are possible in every context. The OLA approach, for example, may only be undertaken for occupations that have an Essential Skills Profile and either National Occupational Standards or a National Occupational Analysis.

Occupations, professions or trades which are diverse and/or have many sub-specialties are challenging to cover in one benchmarking project.

Projects that have multiple purposes (e.g., analyzing the language demands of a profession for both academic and workplace contexts) require a more complex, integrated design.

Some project designs and contexts require considerable skill and expertise on the part of researchers. For example: projects where the outcomes of the research or even the process of conducting the research is a matter of contention; contexts where the work conditions or work environment are difficult, uncomfortable or unfamiliar; project designs that involve large, complex or technically challenging data collection.

The political and economic climate can play a role. For example, consultants for the CCLB-N project were advised to not make contacts to arrange observations until labour negotiations between nurses and the provincial government were settled.

My clients have difficulty understanding why a larger team is necessary - if we had a process laid out there would be a stronger argument for a team.

Key Learnings:

Consultants identified a number of key learnings or best practices at this foundational stage of a benchmarking project:

- Define and document carefully decisions at this point, especially re: the intended results of the research and the parameters of the group being studied, such as what level of the occupation is being analyzed (e.g., apprentice or journeyman? Entry or experienced? Mid-level or senior management?)

- Take the time and effort required to gain buy-in of key stakeholders, including internal/external champions who can open doors and promote the project before, during and after it is completed.

- Limit the scope of the occupation to what is reasonable within project resources.

- Plan on a generous span of time for this kind of research. This type of research requires considerable lead time and wait time, as it can be challenging to arrange site visits, to gain participation in focus groups, etc. A part-time approach spread over a longer period of time is often more successful.

- Err on the side of over-consulting stakeholders. It may be that a stakeholder will have little to contribute to the discussion, but not consulting them risks insult or opposition.

- Ensure that the people on the Advisory Committee are able and willing to open doors at worksites. If you can't get into the workplaces you can't do the work.
For Further Discussion:

1. What training/expertise/qualifications are required of people who do benchmarking projects?
2. Is there a need for professional standards for benchmarkers?
3. Should training be developed and offered for benchmarkers? If so, what should be included in this training? How and where should it be offered?
4. What guidelines might be appropriate for estimating time and budget for a benchmarking project?
5. Who should be involved in developing a Request for Proposal for a benchmarking project?

Stage 3: Data Collection

Strategies

Overall strategies that applied to all methods of data collection included:

- collecting data on reading, writing, speaking and listening tasks
- employing a mix of data collection techniques
- gaining insights from multiple perspectives
- trying to get a representative sample (representative of the range of work tasks and work settings, geographical dispersion, if important)
- collecting and documenting the results of the data collection in a standardized way to facilitate consistency between researchers and data analysis
- obtaining participants consent, in writing

All but two of the approaches employ a mixed method of data collection techniques. The exceptions are the Occupational Language Analysis (OLA) method which derives a task inventory from nationally validated sources of data found in the Essential Skills Profile and the National Occupational Standards (or National Occupational Analysis, in the case of the Red Seal Trades) and the CCLB's project with the Information and Communication Technology Sector Council which is currently underway and using occupational standards and competency profiles as the basis for their research.

All other projects employed typically at least three methods of data collection and all included observation and job shadowing as part of the mix. Consultants on these projects indicated that choosing a variety of data collection strategies was intentional, for several reasons:

- Triangulation - collecting data through multiple methods - was seen as a means of confirming the validity and reliability of the results
- Different types of data are better gathered through different methods. For example, data re: frequency or importance, if desired, was more easily gathered in a survey format. Interviews and focus groups provided richer qualitative description and anecdotes.
• The objectives of the research influenced the choice of strategy. Consultants indicated that projects that would ultimately result in data to inform the development of an occupation-specific assessment tool required more time, intensity and rigor in data collection and analysis.

• Time and budget directed some choices, as did the skill and expertise of the project team (e.g., if one of the researchers were qualified to administer a language proficiency test such as the Canadian Language Benchmarks Placement Test (CLBPT), then this might be selected as one method of data collection)

• The availability and preferences of participants in the research was also a factor. If, for example, a worksite could only free up one worker at a time, interviews were selected vs. focus groups. If the consultants had difficulty gaining sufficient participation for a focus group, they might opt for individual interviews or an emailed survey and telephone follow up.

• Observation and job shadowing were identified as the one non-negotiable technique for all projects that did more than secondary research.

The concept of triangulation was also applied to who provided data as well as how. Within one work or study context, data were collected from job incumbents or students as well as others who worked with them, typically direct supervisors (in a work context) or instructors (in a study context).

In occupational benchmarking, all projects solicited data from a minimum of three worksites as well. The number of worksites actually ranged from 3 to 15. Projects that were national in scope also needed to ensure that the sites spanned several regions. Consultants indicated that beyond the need for multiple perspectives, the number of worksites was determined in part by the need for a representative sample - so, the broader or more diversified the occupation, the broader and more diversified the sample needed to be.

For the Food Counter Attendant project we had planned on doing eight site visits - two to each of the fast food chains represented on our Advisory Committee. The Committee advised that visiting one restaurant in each restaurant chain would likely be sufficient, due to the homogeneity of the work and work context - “if you’ve seen one McDonalds you’ve seen them all” - and, because there was a lot of similarity between operations at each of the four restaurant chains. Moreover, the standardization and centralization of training and documentation meant that we were able to collect authentic materials from the main office beforehand, rather than repeating this step at each worksite. As a result, we were able to save a lot of time in the data collection phase.

One point of difference between approaches was whether or not to collect data about the importance or frequency of the task. Several consultants opted to collect data about frequency though a survey, others asked about frequency in interviews. Another group consciously decided not to collect data on frequency, as they felt frequency is not always a relevant factor.

Comparative Analysis of CLB-Referenced Benchmarking Methods
For example, in profiling the language demands of Childcare Administrators, we learned that they sometimes or rarely make presentations to parent groups, community groups, etc. about things like park features, proposed legislation, etc. but it is an important part of their job nonetheless.

The research revealed seven basic types of data collection techniques used to gather information in order to analyze the language demands of an occupation. Each of these is discussed in turn.

1) Environmental Scan

Most research projects started with identifying and reviewing any available information about the occupation or program and the context for communication. For occupations, references often included:

- the National Occupational Classification
- National Occupational Standards or National Occupational Analyses
- Essential Skills Profiles
- Occupational Language Analyses
- job descriptions from employers/Advisory Committee members
- work descriptions found on websites of industry, trade or professional associations
- job profiles included on websites targeting students or job seekers, such as the OCCINFO profiles

For college programs, this review might include some of the same references if the program prepares learners for a specific occupation or work context. It also typically included a review of:

- course description, outlines, syllabi
- entry requirements; entrance tests
- written information/prior reports about needs or challenges for the participants in these programs

2) Direct Observation or Job Shadowing

Language tasks were identified through observing and/or job shadowing. Job shadowing refers to following the worker as they do their job, and noting any reading, writing, speaking or listening that they undertake in the course of their work. Observation is a bit broader, including, for example, meetings, toolbox sessions, orientation and training for workplace contexts and classes, labs, lectures where the focus of the observation may be on the group or other individuals (e.g., the trainer/instructor) vs. the job incumbent. The purpose of these techniques is to

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gather samples, written and verbal, of authentic interactions or “to gather samples of real time speech” as one consultant put it.

Attempts were made to observe the individual(s) in as full a range of tasks as possible. In practice, this was not always possible, and observations were limited to “what was happening” when the researcher was present. This was a challenge for the workplace as well as the college program. For the workplace, the occupation may have long blocks of time where the worker does not communicate with anyone, or work conditions (e.g., noise of machinery, workers wearing earplugs) limit the amount of actual communication. As well, some important tasks just do not happen every day, and researchers could not wait for this opportunity. Furthermore, it is not uncommon for a scheduled observation at worksite to be pre-empted at the last minute for some reason, e.g., the work team was short-staffed or there was a problem on the production line.

In college programs it was easier to count on labs and lectures happening as scheduled, but the challenge was being able to view all important activities within the timeframe that the researcher (typically an instructor given leave from teaching duties) was available. For example, lectures might happen in the first month of the program and work placements happen in the final month.

An important distinction between approaches seems to be whether or not the observation was guided. Several processes used checklists or templates for data collection that were also used as part of data analysis. Even if they were not used in the actual process of observing, they are described here as they served as a frame of reference for the observation.

Some processes use guided checklists featuring task descriptors drawn from the What the Person Can Do column for Speaking CLB 3-12. (See the example included as Table # 4 under the Analysis section) The checklist cues the researcher to look for those tasks and provides a place to note any observations about that task in the right hand column, including notes about performance conditions, importance or frequency, if that was desired information. Furthermore, researchers in the VCC projects were encouraged to refer to a list of verbs appropriate for describing each language skill (e.g., “advise, ask, clarify” for speaking or “review, scan, skim” for reading).

Red River College uses a Record of Observations (see Appendix 2 for an excerpt of the one used for the CCLB-N project) which includes a checklist of responses for type of activity (e.g., independent work, collaborative work, listening to a presentation), space for a description, indication of the relative demand of each skill (high/medium/low), whether or not the task was required or optional and if support was provided.

Other methods used unguided or ‘less guided’ observations, focusing on the task observed without reference to the CLB at that point. The ALDO project provided only a skeletal structure based on the primary competencies for speaking and listening (Social Interaction, Instructions, Suasion, Information) with the researcher noting tasks and contextual factors underneath columns for each category (see2). The researcher for the CSMLS noted that it was important to them that the observations were not guided at all – researchers simply observed, made notes about what was
observed and performance conditions, environmental factors, etc. and later analyzed their relation to CLB levels.

The number of worksites involved in an occupational benchmarking project varied between projects and depended on the group and the purpose of the initiative: projects that were national in scope or intended as a basis for developing an assessment tool tended to involve more worksites, more geographical dispersion of those worksites, and more time in observation. The number of worksites ranged from 3 to 15 and the number of hours spent observing ranged from 16 to 120.

Finally, several practitioners commented that it is important to have more than one researcher in the room for the observation, wherever possible. This ‘dual perspective’ was seen as important to facilitate richer data collection for analysis.

3) Interviews

Interviews were a staple of each benchmarking project and participants typically included both job incumbents or students as well as those who knew the group well (e.g., supervisors, co-workers, instructors or trainers, HR manager)

All interviews were structured, with guidelines for researchers. The structure took the form of guided questions (see a sample in Appendix 4) and three approaches used questionnaires as part of the process, e.g., rating the importance of selected language tasks. Most interviews were onsite, but one project did 30 minute advance telephone interviews with individuals scheduled for observation. Interviews with members of the group being studied were used either for one or both of the following purposes:

▪ to profile typical reading, writing, speaking and listening tasks or

▪ to solicit description of the context for communication and examples of successful or unsuccessful communication or intercultural interaction and what strategies were employed to overcome challenges

How were individuals selected to be interviewed? Interviews with job incumbents were either people who volunteered to be interviewed or people who were selected by their employers to meet defined criteria such as “a good, competent worker – neither the rookie nor the superstar.” (Researchers did note, however, that the person interviewed did not always meet these criteria – that sometimes, the person interviewed was just the person they could make available).

4) Focus Groups

Focus groups were used less often than interviews – just under one-half of the projects reviewed used this strategy. The most common context for focus groups was a meeting of instructors in a college program. In many cases, the focus group was used as a second stage of data collection after the task analysis. (See discussion under the Stage 4: Data Analysis.)
5) Surveys

Surveys were used in roughly one-third of the projects reviewed for this research and seemed to be used more often as a later stage of data collection or even validating/analyzing the data, using prior data collection or research to shape the questions on the survey. (See discussion under Stage 4: Data Analysis.)

In addition to data collection, surveys were sometimes used to as a precursor to meeting in person. BVC, for example, sent out a survey to instructors asking them to rate the importance of selected tasks and answer two open-ended questions in preparation for a focus group, and sent a similar one out to students. The results were taken in at the focus group and tabulated.

6) Collection and Review of Authentic Materials

All benchmarking projects included the collection and review of authentic materials, i.e., printed or online documents, brochures, forms, notices, handbooks, manuals, job aids, blueprints, training materials, etc. that are actually used by workers or students to perform required tasks, as opposed to simulated materials. In college contexts authentic materials included course descriptions, course outlines, sample assignments, textbooks; exams, handouts, PowerPoint presentations and student writing samples, if available. For textbooks, the researchers may ask the instructors to randomly select passages or to select excerpts that they felt were representative of reading tasks for students.

Reading samples were often easier to obtain than writing samples, perhaps due to issues of confidentiality for the individual or the work context.

7) Language Proficiency Assessments

Assessing the language proficiency of selected individuals who are members of the group being studied was part of several projects focused on analyzing the language demands of an occupation. The information gathered was generally used as a way to validate the CLB levels assigned through other data analysis processes, rather than a primary basis for decision making. Researchers at Red River College suggest that the language proficiency scores of ESL professionals (target population) should align (+ or – 1 CLB level) with the CLB levels determined to be the language demands of the profession.

Who was selected for assessment? The RRC method involves assessing the language skills of individuals identified by their supervisor as ‘working successfully’ (i.e., linguistically proficient and professionally competent in an entry-level position). In the ALDO pilots, where the focus was on setting a minimum level to work safely and competently in the occupation, researchers asked supervisors to identify individuals whose language skills represent the minimally acceptable level – people whose language skills were ‘just good enough’ to work in English, without regular need for translation/interpretation. Consultants on both projects acknowledged the challenge of ensuring the individuals selected for assessment actually met these criteria.

What tool was used to test language proficiency? This appears to be a point of debate among practitioners. Several projects used the Canadian Language
Benchmark Placement Test. The CCLB-N project used the CanTEST\textsuperscript{7} to assess the skills of internationally educated nurses because it measured language skills up to CLB 10. In all cases, the test was administered by qualified test administrators and the results were not shared with the employer. However, some practitioners indicated that they made a conscious choice NOT to include language proficiency testing as part of their process, as they felt there is no tool that is appropriate for this purpose. The CIITE project, for example, concluded that the CLBPT was developed as a test of general communicative proficiency (vs. an academic context) and for the purposes of placement, and therefore was not an appropriate choice for benchmarking college programs.

How many were assessed? This varied by project. The CCLB-N assessed ten internationally trained nurses; the RRC projects assessed a minimum of three but recommended “as many as possible”. The largest number of assessments by far was undertaken by the MELA project, which used the CLBPT at the intake of five new cohorts of the targeted program to assess a total of 147 individuals. The CLBPT allowed test takers to demonstrate whether their language skills were in CLB Stage II (CLB 5 - 8), which was the required level of language proficiency for the program. The intent of this data collection was to track students over the course of their participation in the program and validate a CLB cut score for entry to the program.

Finally, language testing posed some logistical challenges and cost implications for researchers who were not qualified test administrators. It should be noted that there is a requirement from CCLB for any CCLB owned test being used for research purposes that the researcher is responsible for completing appropriate forms with CCLB and reporting on results.

**Challenges and Limitations**

In addition to the challenges noted in the discussion of each technique, challenges at this phase in the process included:

- gaining access to the workplace takes considerable time and effort
- some jobs do not lend themselves well to observation – there may be long periods without communication or there may be conditions in the work environment (e.g. loud machinery) that impede communication; others may have personal or confidential interactions (e.g., nurse-patient) where an observer would be obtrusive.
- the fact that someone is observing the interaction/communication can change the nature and quality of the interaction
- getting a representative sample is not always possible. Sometimes it just has to be a convenience sample – those who are working at that time.
- timing of data collection activities within a defined time frame can be challenging. Some important activities may only happen infrequently or be hard to simulate (e.g., emergencies) or they may happen at a point in time beyond the duration of the project (e.g., clinical/coop placements).

Comparative Analysis of CLB-Referenced Benchmarking Methods

We wanted to benchmark at two points in a college program: entry level (so first semester) and mid point (third semester) in an effort to have an idea of how the language requirement progressed throughout the semester. We chose to collect data at two points: first and the third semester. This meant, however, that we could only review programs that had several sessions and staggered entry/end dates, as the researcher (a staff member) could not be available on a part time basis – we had to collect this data within one semester.

- researchers may only be able to see part of a task. For example, when analysing a textbook, the focus is on reading, and if the researcher is unable to participate in the lecture related to that reading they are unable to document the task beyond reading comprehension.

Key Learnings

- Importance of triangulation, getting multiple perspectives and using a range of data collection techniques
- Being unobtrusive; trying to not influence or interrupt usual process
- Looking for other contributing variables - sometimes the really interesting bits are outside of what you are focusing on
- Starting at the top – gaining and communicating the support of management or industry champions, to help you open doors
- Writing field notes right away, while they are “fresh”
- Using a standardized process, tools and templates to collect and document the data in a consistent way, by and between researchers
- Observing the job incumbents or students in the full range of authentic workplace or classroom tasks, where possible.
- Protecting the privacy of participants; ensuring confidentiality of comments or assessment results
- Following principles of ethical research and/or securing ethics approval where Ethics Committees control applied research conducted within a profession or institution (e.g., full disclosure to participants of why the research is being conducted and what will be done with their input, assurance of confidentiality, secure storage of data, etc.; obtaining informed written consent from participants)
- Using technology to facilitate the data collection, where feasible (e.g., online surveys)
- Reassuring participants at the start of each data collection process re: what the purpose of the data collection is; why they have been chosen; how the results will be used and/or shared. Even if this was communicated previously to a supervisor, it is important to confirm and reinforce that message.
When we got out into industry I spent FAR more time than I anticipated helping them to understand the benefits of this project. This was slow and laborious process and sometimes I don’t think they ever did connect the dots.

One senior manager at a company was very open to participating, but by the time the request was passed along to a supervisor and then to one and then another, by the time I met with the employee to be interviewed he was very antagonistic – he didn’t understand the project at all and he felt singled out and vulnerable or suspicious as to why he was selected for this interview.

For Further Discussion

1. Benchmarking experts generally stress the importance of triangulation – many sources of data. However, clients may insist on limiting data collection to save time/money. How to respond?

2. What are the ethical considerations of doing language proficiency assessments? E.g., will employees feel pressured to participate? Confidentiality? Should a general proficiency test be used for assessment in a workplace or academic context?

3. How much data collection is “enough”? Is there a recommended minimum for the number of worksites or the number of hours of observation?

4. How important is it to have two researchers undertaking joint interviews and observations?

5. Frequency and/or importance of the language task – how important is it to collect this kind of data? If it is important, what is the best way to collect this data?

Stage 4: Data Analysis

The processes used to analyze the data vary from project to project and depend on the purpose of the project and the type of data collected. One process that is common to all projects is a task analysis based on information gathered from all sources. This analysis involves identifying key communication tasks in each of the four skill areas and relating these tasks to CLB descriptors. One researcher described the process in the following way:
Six to ten hand-written pages of notes were collected from observations at each work site. Field notes were then organized into table format, classified by language skill, and sorted. Each communicative task was characterized in terms of the CLB. A total of 415 communicative tasks were collected, categorized, and analyzed. This resulted in a list of authentic communicative tasks for each skill area – speaking, listening, reading, and writing – that typify the communicative demands of the workplace. An analysis of these tasks against the CLB descriptors made connections between the workplace demands and language ability. Notes on the specific language skills used, the purpose of the task, the nature of the task (routine, frequent, rare), who is involved (colleagues, supervisor, other health professionals) and the stress level of the situation (i.e., STAT, urgent, tests) all contributed to the understanding of the level of language proficiency required.\(^8\)

In some cases researchers begin with the CLB 2000 document as the lens through which to categorize and describe tasks. For example, several projects use what they call Language Task Organizers (described under the Data Collection section), which are charts developed for each skill area that include competencies taken directly from the CLB 2000 document. Examples of observed tasks are inserted opposite the competency and CLB level they most closely match. If there are no tasks observed for a specific competency, the corresponding space in the ‘Observed Tasks’ column is left blank.

The following is an excerpt from a Language Task Organizer used by Bow Valley College in a project to benchmark the language demands of the Education Assistant Program.\(^9\)

<table>
<thead>
<tr>
<th>CLB Range</th>
<th>CLB Descriptors for Speaking Social Interaction</th>
<th>Observed Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Open, close and respond to short casual small talk</td>
<td>Respond to questions about how time was spent on the weekend.</td>
</tr>
<tr>
<td>5</td>
<td>Respond to small talk comments.</td>
<td>Respond to instructor small talk.</td>
</tr>
<tr>
<td>5</td>
<td>Extend, accept or decline an invitation or offer.</td>
<td>Thank instructor for allowing an extracurricular activity related to practicum. Extend invitation to participate in class tea, wear special attire. Invite instructor to come and do a practicum assessment on a given day.</td>
</tr>
<tr>
<td>5</td>
<td>Express and respond to compliments or congratulations.</td>
<td>Respond to a birthday greeting. Respond to classmate’s congratulations on engagement. Respond to classmate’s bringing a treat to class.</td>
</tr>
<tr>
<td>6</td>
<td>Make or cancel an appointment or arrangement</td>
<td>Cancel instructor visit to practicum, change date. Negotiate and clarify practicum scheduling.</td>
</tr>
</tbody>
</table>

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\(^8\) Strachan, A. (2007)

\(^9\) Coad & Taillon (2009)
It should be noted that in the process of matching observed tasks to CLB competencies researchers at Bow Valley College also refer to the CLB Performance Conditions in order to make their decisions. The project team refers to a list that details the CLB performance conditions for each skill level.

Several people mentioned that the context of the communicative task (e.g., where, when, how, with whom and why the communication takes place) is an important consideration in evaluating each task. One researcher explained that their research team explicitly notes performance conditions that affect the communicative task. For example, they note:

- ergonomic factors: such as noise that affects listening skills
- socio-cultural factors: personal space; nature of relationships with colleagues; expectations of guidance/support from management, etc.
- high stress situations: rapid response; error; interaction with unfamiliar professionals

In other projects researchers approach the task identification and analysis using language that is more similar to the way the task would be described in the workplace, recording only those tasks they observed or that were reported to them through interviews. The researchers then sort the tasks as best they can into CLB competencies and assign appropriate benchmark levels. The following example is based on a task analysis format used in a project to benchmark the language demands of labourers in the food processing industry.

<table>
<thead>
<tr>
<th>Table #5: Excerpt based on ALDO Pilot: Food Counter Attendant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Interaction</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Task #1</strong>: Read signs and labels that are common to the plant.</td>
</tr>
<tr>
<td><strong>Sample</strong>:</td>
</tr>
<tr>
<td>• Understands WHMIS labels on bleach and cleaning supplies</td>
</tr>
<tr>
<td>• Warning signs, “Slip hazard” “Electric shock hazard”</td>
</tr>
<tr>
<td><strong>CLB 2</strong>: Understands very short basic common forms, signs, labels.</td>
</tr>
<tr>
<td><strong>Task #2</strong>: Read poster and whiteboard notices that change everyday.</td>
</tr>
<tr>
<td><strong>Sample</strong>:</td>
</tr>
<tr>
<td>• “15 min OT everyone” (bulletin board notice)</td>
</tr>
<tr>
<td>• Information about daily production targets. Chart with product codes and numbers.</td>
</tr>
<tr>
<td><strong>CLB 2</strong>: Understand very short basic common forms, tables, schedules.</td>
</tr>
</tbody>
</table>

10 Strachan, A. (2007)
In all cases the primary reference for the task analysis is the CLB 2000 document but many researchers refer to additional CLB resources, such as Additional Sample Tasks\textsuperscript{12} or the CLB Companion Tables\textsuperscript{13} to support their analysis.

**Analysis of Reading Tasks**

The one skill area in which the analysis of tasks and texts moves beyond reference to the CLB is in reading. Several research projects include an analysis of reading texts using standard readability formulas. Two formulas are commonly applied. The first is the Flesch Reading-Ease which measures average sentence length in words and average number of syllables per 100 words to determine an index number that rates the text on a 100 point scale. The higher the score, the easier it is to understand the document. The second is the Flesch-Kincaid which converts the reading ease score into an estimate of how many years of schooling it would take someone to comprehend the text. Both of these readability formulas are available through MS Word software. This makes it relatively easy to run excerpts of text through a readability evaluation. In addition, some researchers do further descriptive analysis of the text which is then documented and reported. The following example is taken from a project done at Bow Valley College to benchmark the language demands of the College Success program.\textsuperscript{14}

**Text Readability:** Downing, S, (2008)

<table>
<thead>
<tr>
<th>Text Sample Readability Scores</th>
<th>Text Features (format/organization)</th>
<th>Complexity of Content</th>
<th>Visual Support</th>
<th>Complexity of Language</th>
<th>Accessibility of Vocabulary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructional Text:</td>
<td>- table of contents with chapter headings, topic and sub-topic headings - each topic ends with a journal entry assignment and often with a case study (One Student's Story) - each chapter ends with &quot;Wise Choices in College&quot; instructional text - chapter title pages are coloured deep purple, include a quote and a chart of what a successful student does and what a struggling student does with regards to the topic of the chapter</td>
<td>- concepts are abstract and encourage reflection and critical thinking</td>
<td>- includes charts, calendars, black and white cartoons - &quot;Journal Entry&quot; assignments are set apart with an icon - case studies and &quot;Wise Choices in College&quot; sections are boxed and tinted pale purple</td>
<td>- language is conversational and instructional in tone</td>
<td>- some vocabulary from psychology and personal motivation fields</td>
</tr>
<tr>
<td>&quot;Journal Entry 6&quot; Pg 44:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade Level 5.4 Reading Ease</td>
<td>77.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Narrative Text:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;Case Study: Professor Rogers' Trial&quot; p. 121:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade Level 6 Reading Ease:</td>
<td>74.7</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\textsuperscript{12} Pawlikowka-Smith, G. (2002)
\textsuperscript{13} Centre for Canadian Language Benchmarks (2000)
\textsuperscript{14} Coad, K. & Taillon, M. (2009), p.26
While this type of readability measure does not have a direct correlation to CLB descriptors, some researchers find that it is a useful indicator of comparative level of difficulty of a text. These standard readability measures may be familiar to other project stakeholders (e.g. those in occupational training programs) and can also be a useful reference when developing support programs for ESL learners. For example, in a project undertaken by NorQuest College to benchmark the language demands of the college’s Health Care Aide program, the purpose of the project was to use the information to develop an effective bridging program for ESL learners. The readability analysis was important because the entrance requirement for the Health Care Aide program was set at Grade 10 equivalency, so the bridging course needed to use textbooks that were within the range of Grade 8 – 10 in order to prepare their students to “ladder up” to the Health Care Aide program.

One researcher noted that when analyzing reading texts they did not analyze the text in isolation but considered what the person would be required to do with the text, that is, they analyzed the reading text in the context of a reading task.

In projects managed by the CCLB the project team has made a conscious choice not to do readability analyses; they prefer to relate their analysis solely to the CLB as they want to discourage thinking about reading in terms of grade levels.

**Making Decisions about Benchmark Levels**

In the projects reviewed (with the exception of JALA and OLA projects which are described later in this section) the analysis of language demands results in assigning a benchmark level or levels to each of the four skills. These levels are then often considered as recommended entry levels for students in the program or workers in the occupation.

There are several different approaches that researchers use to arrive at this number and it always involves more than a statistical process. It requires expert judgment by ESL professionals who are experienced using the CLB.

All projects used more than one researcher to complete the analysis. In some cases there were two researchers; in larger projects a team of three or more people were involved. Several researchers stressed the importance of having the task analysis initially done independently by each researcher. Researchers then meet and compare their analyses. It typically involves collaborative review and consensus - not averaging the results, but comparing, discussing and challenging how individual tasks were benchmarked to arrive at mutual agreement.

One researcher reported:

> The assignment of a final CLB for each skill area was based on:
> 1. A weighting of what skills were critical; and
> 2. Which levels occurred most frequently in the analysis.\(^{15}\)

At the data collection stage some researchers asked respondents about the frequency of tasks. (e.g., Do you do this task daily, weekly, rarely, etc) Others asked about the

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\(^{15}\) Russell, Strachan & Shek (2006)
importance of a particular task. (Is this task of high, medium or low importance?) This information is rolled into the analysis.

In the Red River College projects researchers complete detailed observation charts to record the communication tasks they observe. They later develop pie charts that show the frequency of various situational uses of language (who the employee was speaking to) and types of language tasks (e.g., informs, clarifies, gives instruction, suggests etc.). They analyze the data using both the analytical and global descriptors from the CLB 2000 document.

In a project undertaken by the CCLB, the project manager explained the process they used in this way:

> Each researcher identified a benchmark for each task that he or she had identified. Benchmarkers came together for two days and went through 1400 tasks in their inventory, one by one, and discussed each one. If they found they had three or four tasks that were the same they just wrote it once. They looked at all the examples we had and tried to decide what CLB level is really needed and where most of the tasks were clustered. It helped to have the analysis of how many tasks were at each level. We created a table with the CLB level and range identified for each skill.

There is a huge range in the number of tasks that were identified and analyzed through the various projects. The numbers are not easily compared, however, as some projects reported every single observation of any language task. Other projects reported only the number of unique language tasks that were analyzed, deleting duplicate examples from their inventories. Still other projects reported the number of language tasks that were clustered and presented in the final report to the project owner.

When relating language demands to benchmark levels researchers must make decisions about language tasks that seem to be anomalies – tasks that are at a much higher or lower CLB level than the majority of tasks observed. Bow Valley College uses the Task Organizer described earlier in the section to identify tasks observed. When they make their decision about benchmark levels, they omit tasks that are either much higher or lower than the others for the skill area. They look at where most tasks are clustered and use the highest level in the range to set the suggested benchmark level.

In another project team, researchers deal with these types of anomalies by assigning a benchmark level for routine tasks and a second level for what they call communication spikes. These communication spikes are situations in which the language demands are much greater than typical everyday tasks. For example, they might be a one-time occurrence (e.g., orientation training) when the reading demands (e.g., company policy manuals) are much higher than the everyday reading tasks. The following example comes from an analysis of language demands for food counter attendants.

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17 Interview with Marianne Kayed, June 2010
18 Hammond & Associates (2009)
Table # 6: Recommended CLB Levels for Food Counter Attendants

<table>
<thead>
<tr>
<th>Major Skill</th>
<th>Speaking</th>
<th>Listening</th>
<th>Reading</th>
<th>Writing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>Routine</td>
<td>Spikes</td>
<td>Routine</td>
<td>Spikes</td>
</tr>
<tr>
<td>CLB</td>
<td>5</td>
<td>6</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>5-6</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

In cases where the task analysis and benchmarking project form the foundation for development of an occupation-specific test, a greater level of detail in terms of the task analysis is required. This often involves going back to subject matter experts to validate the tasks selected.

*Once the benchmarking analysis had been done, professional competency charts were prepared based on key competencies for each profession. The research team compiled a set of language competencies based on the research of professional competencies and then conducted a set of consultations with program managers who are registered health professionals and were able to verify and clarify the descriptors. These were then used along with the benchmarking analysis to help select target language use tasks for the test development process.*

**Validating the Task Analysis Using Focus Groups and Surveys**

In some cases researchers used focus groups to validate the results of their task analysis. Participants were asked to review and validate preliminary results of the data collection in some form (a summary, a survey) and make some decisions regarding those tasks (e.g., importance; frequency; pre/during/post program).

One key difference appeared to be how ‘guided’ the focus groups were in terms of their association with CLB tasks. For example, the RRC and BVC use a benchmarking rating instrument, which presents tasks for each sub-skill at stages II and III of the benchmarks. As much as possible the tasks are taken directly from the CLB document, with some modification/examples to make the tasks and examples relevant to instructors. Instructors rate each task as pre-program, program or post-program (in the workplace).

In other cases, surveys were used to frame language tasks that respondents could rate in terms of importance. For example, the cross-Canada survey used for the CCLB-N project and the CMRTO project included task descriptors customized for the occupation but based on relevant CLB descriptors from the What the Person Can Do column for all skill areas in a defined range (5-10 for CMRTO, 6-12 for CCCLB-N). Respondents were asked to rate them on a scale of 1 – 5 in terms of their importance to the occupation. (See Appendix 5 for excerpt from the CCLB-N survey)

Surveys were also used to validate data analysis or to “round out the data” - addressing gaps in information or clarifying understanding of key points. The CCLB-OT/P project, for example, decided to use a survey when they encountered challenges in getting people to participate in a focus group. They emailed the survey and followed up by phone or email to get responses.

The CMRTO used two surveys, one modeled after the CCLB-N survey and another based on a list of communicative competencies extracted from the standards of practice for the profession and then calibrated the results. In the second survey, Medical Radiation Technologists were asked to identify the context of the interaction so that language consultants could correlate those to performance conditions described at different benchmarks. The results of both surveys were compared with similar results.

Researchers identified several challenges with using a survey for data collection. Several noted that the nature of the subject matter requires a fairly length survey to cover the full range of tasks in all four language skills. For example, the CCLB-N survey was 7 pages and 116 items in length, and the survey used in the CCLB-S project is 4 separate 6-page surveys for a total of 24 pages.

Most practitioners noted the challenge of earning a strong enough response rate to be able to make valid judgments. The CCLB-N project, for example, was sent out to 1000 randomly selected nurses across Canada, and 154 legible responses, or 15.4%. The consultants who did this work noted that while the data they received was still quantitative and useful for analysis, they now choose to gather data through other means such as focus groups.

The one notable exception to this trend was the CMRTO survey, which earned “more than a thousand responses” from practitioners in the province of Ontario. The consultant credited the fact that it was easy to access (online) and was administered by the provincial regulator.

Another challenge with surveys is getting respondents to answer thoughtfully. The CCLB-N report, for example, noted that:

> Some respondents marked all of the descriptors as 5 (“extremely important”), leading us to question these results, especially because some descriptors represented tasks that, based on all the other data gathered, seemed to be seldom or never required of nurses.\(^\text{20}\)

Two participants described challenges with different response rates to surveys that were presented as a set of four sections, one for each language skill. These surveys were accessed online via links in an email or through a website. In each case, the response rate for each survey directly correlated to their placement in the email or website – the greatest response rate was earned by the first survey, and then in decreasing order, as, presumably, respondents lost interest or decided to stop at one or two survey. One practitioner addressed this issue by changing the order of the links around in the emails sent out.

\(^\text{20}\) Centre for Canadian Language Benchmarks (2002)
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Following the observation and review of materials, the researchers developed a survey for practitioners which was made available online. The survey was based on research into the communicative competencies required for each of the occupations and the equivalent CLB descriptors. The Advisory Committee helped to identify professionals in the medical community who would be willing to offer their insight into language use in the workplace. Survey participants were registered professionals in practice at workplaces identified by project advisors and recruited by the Michener Institute. We were aiming for 100 responses and we got 47. The survey responses from practitioners were key in determining what competencies were most frequently required in each of the occupations so that the team could 1) verify that the test tasks under development were authentic, and 2) establish common communicative competencies among the occupations so that a streamlined and therefore more efficient test could be developed.\(^{21}\)

Panel of Experts

In one project, a group of subject matter experts was brought together to review speaking and writing samples from a group of internationally-educated professionals in order to determine cut scores for an occupational language test.\(^{22}\) The project related to the development of an occupational test so is outside the scope of this research study. However, the process of bringing together field experts (practitioners, regulators or trainers in an occupation) to review ESL speaking and writing samples in order to suggest which represent adequate language use is an approach that may have possible applications in other benchmarking contexts.

Analysis of the Language Proficiency Results

In projects that tried to obtain language proficiency scores from a sample group of ESL speakers, the sample was generally been very small and the information was reported but not used in decision-making. In some cases, researchers initially considered getting this information but then abandoned the idea. In the CIITE project researchers felt that the CLBPT, the most readily available CLB assessment tool, was not an appropriate assessment tool for academic contexts. In another case, the research team was able to get CLBPT assessment results for employees who were referred as having “just enough English to work competently” but were not confident about what could be interpreted from the results. The CLBPT levels varied widely, so the research team wondered what message had been understood by those who had referred employees for assessment. In cases where language proficiency assessments have been done, the results have been used as additional information that helps to validate the benchmark levels assigned through other measures.

\(^{21}\) Russell & Strachan (2005)
\(^{22}\) Ibid
Other Factors

Several approaches identify additional observations or comments. Red River College researchers identify specific challenges that ESL speakers experience in the particular program or occupational setting being analyzed. In some cases factors that support the communication are noted (e.g., strategies that instructors use to accommodate ESL learners).

In one approach the researchers built consideration of contextual factors into the initial design of the research study. They begin with the assumption that communicative proficiency is only one of the factors that impacts communication in the workplace. They use the following graphic to show the interrelationship of some of the many factors that affect workplace communication\textsuperscript{23}.

They write,

> While the CLB can help describe employees’ communicative proficiency, their effectiveness in communicating and comprehending will also depend on their technical competence and intercultural competence. The research team operates from the assumption that the responsibility for effective communication in a multicultural workforce rests with all parties, including those who speak the language of work. Within the workplace context, there are several key contributing factors that influence the language demands. These include:

\textsuperscript{23} Hammond, K. (2011). Model ©Karen Hammond & Tara Holmes
Comparative Analysis of CLB-Referenced Benchmarking Methods

- **Training and Orientation** - is an important part of enabling and equipping any worker. How these are delivered and if and how they have been modified to accommodate varying levels of English proficiency is significant.

- **Communication Support** - tools, resources and services (e.g., plain language documents, translated materials, interpretation services, if necessary) available to accommodate, mediate or reduce a language barrier.

- **English Language Instruction** - the quality, quantity, purpose and integration of ESL instruction, which provides an opportunity to debrief incidents and teach communication strategies.

- **Intercultural Competence of Others** - the ability and willingness of co-workers, supervisors, managers, trainers, inspectors, customers (etc.) to effectively communicate across cultures. This involves an understanding of how our assumptions affect cultural norms, expectations, values and non-verbal communication.²⁴

The team’s final report to project owners includes both observations about the workplace context and suggestions for ways in which the workplace context could be modified to better support ESL employees.

**OLA Analysis Process**

Generally the OLA analysis relies on two sources of secondary data (the National Occupational Standards and Essential Skills Profile) for an occupation. The OLA Analyst assigns each communication task identified in the source documents to competencies or task descriptors on a standard template drawn from the *What the Person Can Do* column of the CLB. The Analyst places the task where it best fits, knowing that a perfect match is often not possible. If the source document lacks important detail or context, the Analyst may contact a subject matter expert provided by the client who clarifies, for example, if “notify supervisor” would typically be verbal or written communication. Once all tasks have been recorded, the Analyst deletes any CLB competencies that were not represented by an observed task. See Appendix 6 for an excerpt from one OLA.

A number of tools are provided to assist the Analyst, including a Task Sorting Guide that suggests categories but not levels for common tasks or documents found in the worksite. For example, under speaking, it suggests that referencing an MSDS sheet would go under Reading: Instructions and writing notes in a log book would go under Writing: Business/Service Messages. Another guide suggests general benchmarks and levels for statements drawn from the summary charts of the Essential Skills Profile. The Analyst may look up other OLAs in a database kept by the CCLB to guide them in their analysis. In addition, the OLA Analyst Training (which is mandatory for any OLA Analyst) provides considerable detail and practice in how to assign benchmarks given a range of factors and the training comes with mentoring support for the first and second OLAs developed by the Analyst, allowing that “second pair of eyes” on the benchmarking. Finally, a completed OLA undergoes two more reviews: one by an

²⁴ Hammond, K. (2011)
expert reviewer who ensures that the tasks have been appropriately benchmarked and that all standards for formatting and referencing are met; and one by a focus group of subject matter experts or one SME. This review provides feedback on the content, in terms of what content has been captured. They may pose questions about why something has been benchmarked at one level or another but this decision rests with the OLA Analyst and his/her mentor.

While OLAs are meant to be developed solely from secondary research, one OLA has been developed for the Early Childhood Sector Council that included original research. In this case the researchers did onsite observations and captured the data in the form of an Additional Task Inventory.

**JALA Analysis Process**

JALA uses a process of job-shadowing to identify authentic language tasks in a specific occupation as a basis for curriculum development. (See Appendix 7 for a sample of a JALA). A JALA is made up of:

- a heading with a unique number and short descriptive title
- a description of the job activity
- verbatim samples of the written and oral language observed
- an analysis of the speaking, listening, reading and writing tasks included in each activity
- the CLB descriptors that apply to that activity
- notes on socio culture competencies, performance conditions, and curricular considerations.\(^{25}\)

One of the researchers involved in a JALA project commented:

> Within any one job shadowing session, the researchers observed from 3 to 15 different job activities, which could include just one language skill or all four language skills. By analysing the job activities separately, we have had to sacrifice an overall sense of the pattern of work flow during the job shadowing. However we were able to achieve a more focused and in depth analysis of the language tasks this way.

**Challenges and Limitations**

Researchers identified the following challenges and limitations in analyzing the data in their benchmarking projects:

- Analysing the tasks as speaking, listening, reading or writing tasks is a helpful but sometimes ‘artificial’ distinction. These tasks rarely exist in isolation, and are blended and integrated, as when listening to a presentation and writing notes, or reading and writing when completing forms.
- Researchers in the CIITE project made the following comments.\(^{26}\)

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25 Vancouver Community College (2006)
The CLB 2000 is intended to provide EAL practitioners with a sense of the general communicative competencies an EAL learner might possess at specific benchmark levels. Therefore, certain difficulties arise when it is used as a tool for benchmarking college programs.

First, the CLB 2000 describes what a L2 adult learner can do communicatively with language in specific competency areas. Thus, the focus is on the learner’s abilities. By contrast, program benchmarking is intended to describe the language demands, that is, how language is used in general in college programs. Researchers are required to reinterpret the CLB 2000 language descriptions as language tasks rather than abilities and competencies L2 learners are capable of demonstrating. CLB 2000 statements describe what a student can do with language, for example, “Can speak on familiar topics at both concrete and abstract levels [10-15 mins]”. In benchmarking this description could be reinterpreted as “Speaking on familiar topics at both concrete and abstract levels is necessary.”

Second, the language demands in a college program often involve educational tasks not directly captured in the CLB 2000. Researchers are therefore required to pay particular attention to specific variations between benchmarks. In general, an effective approach to benchmarking is through cross-institutional dialogue. This allows colleges to collectively share issues and work through challenges to encourage a community of shared practice.

- Arriving at one number for each language skill that represents the range of tasks for an occupation is challenging. What is routinely required may be very different from what is sometimes required.
- Researchers at Red River College indicated that in some situations the CLB levels are presented as a range to indicate that one CLB level was not predominant. Researchers agreed that for practical purposes readers can defer to the lowest number of the two. Researchers in the CIITE project also presented a benchmark range in cases where they were benchmarking a program that was offered at several different colleges.
- The JALA and OLA processes do not result in assigning minimum benchmarks to an occupation – their contribution is a task inventory, as a useful basis for curriculum development, for example, but their process does not provide the level of specificity to arrive at minimum benchmarks.
- When analyzing the language demands of programs that have both an academic and practical/clinical component, it was noted that the language demands may be quite different. Often the demands of the academic component are higher, largely due to the complex reading texts and the amount of information presented through long, often technical lectures. Several researchers observed that it was important to analyze and report on each area (practical/clinical and academic) separately.

26 Colleges Integrating Immigrants to Employment (2007)
Comparative Analysis of CLB-Referenced Benchmarking Methods

- The analysis benefits from many perspectives but funding may limit the number of researchers. One researcher commented, “One challenge was the limited number of researchers (3) in the calibration of benchmarked professional competencies. Ideally more time and content advisors should be present.”

Key Learnings

- Many researchers commented on the value and importance of having more than one researcher involved in the analysis
- Several said that the analysis should first be done individually and then team members should come together to discuss the results and arrive at a consensus
- Many commented that analyzing the data was a very time intensive process and that it was important to plan for sufficient time for both the individual analysis and the team discussion

For Further Discussion:

1. Trying to obtain language proficiency scores as part of the data collection was identified as important by several researchers. However, at the stage of assigning benchmark levels, the information was not used for initial decision making related to recommended benchmark levels. Considering the issues associated with gathering this information (e.g. confidentiality, logistical issues in arranging for assessments, providing honoraria to those who volunteer to be assessed, suitability of available CLB assessment tools for the client group) should we continue to gather this information? Are there other ways that the assigned CLB levels can be validated for the target population, particularly IE – EAL professionals?)

2. To what extent does using the CLB competency framework as a lens through which to categorize and analyze academic and occupational tasks limit what we observe? Are there some ways to use the framework in our data collection and analysis that are better than others?

3. As researchers for this study we found that most reports (including our own!) did not fully describe the analysis process. Should there be some suggested practices or guidelines for analysis? E.g., a minimum of two people to arrive at the benchmarks?

4. Many researchers use some kind of readability analysis; however the results of readability measures do not relate to the CLB Reading benchmark descriptors. Might it be useful if future versions of the CLB document (or companion documents) relate readability measures to the benchmark level descriptors? Are the Flesch-Kincaid and Flesch Reading Ease the most appropriate readability tools to use with academic or occupational text?

5. How much information is enough to be able to say with confidence that these are the language demands of the occupation?

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27 Interview with Andrea Strachan, June 2010
Comparative Analysis of CLB-Referenced Benchmarking Methods

6. Many researchers include “other considerations” in their analysis. Should analysis of the contextual factors that influence the language demands of an occupation or program become a standard component of the benchmarking process?

7. To what extent should job incumbents, regulators, occupational examiners and other field experts be involved in determining the language proficiency that is ‘adequate’ for the job? What is the best way to get their input? (e.g., individual interviews, focus groups, referring individuals who then are tested for language proficiency? panels that rate ESL samples?

8. While analyzing the Benchmark numbers recommended through various benchmarking initiatives was beyond the scope of this project, the researchers noticed emerging patterns. For example, projects that have benchmarked professions typically describe the language demands at around Benchmark 8. Are individual benchmarking studies for each occupation or profession necessary? What would be gained/lost by studies that used a ‘broader brush’ approach and recommended Benchmark ranges rather than a single number for clusters of occupations/professions?

9. Some researchers have suggested that their responsibility in a benchmarking project is to analyze the language demands in relation to the CLB standards. However, the responsibility for making decisions regarding the results, e.g., suggesting entrance requirements, must rest with others (e.g., regulatory bodies, employers, program administrators.) What should our responsibilities as researchers/consultants be? What should be the limits of our responsibilities?

Stage 5: Report the Results

Strategies

Common activities at this stage included:

- preparation of a written report
- presentation to key stakeholders
- announcement/communication of the results to stakeholders
- reporting/documenting additional contributing variables observed in the course of the research

All projects produced a final report documenting the research process and the results of the research. Most of the final reports from projects reviewed for this research were not available for review. The consultants were able to review final reports from the CCLB-N project, three ALDO projects, two Bow Valley College projects, two Vancouver Community College projects.

The reports ranged from 31 to 87 pages in length. Some but not all included an executive summary and limitations of the research, and some included graphical
representation of the data (charts and graphs). All reports included the following core sections:

- Acknowledgements
- Executive summary
- Background or context for the research
- A description of the occupation or program under review
- A description of the CLB 2000
- Purpose or objectives of the research
- Research process
- Results of the research
  - A task inventory aligned to the CLB and categorized by language skill
  - Overall analysis – e.g. recommended S/L/R/W levels
  - Readability analyses, if applicable
  - CLBPT results, if applicable
- Summary observations by researchers – e.g., other issues; potential solutions or challenges, suggestions for further research
- Appendices, including data collection and analysis tools

The ALDO report differed from the others in its intentional focus on contextual factors in the workplace. While other projects may have referred to some contextual/contributing factors in the ‘Observations’ section, in the ALDO reports contextual factors were major sections of consideration, as shown in the following excerpt from the pilot with construction labourers:\(^{28}\):

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\(^{28}\) Hammond, K. (2011)
One consulting group indicated that commenting on contextual factors in communication challenges and needed supports was

...always a bit of a dance – we don’t want to sound critical. We often categorize observations at the end of the reports and we try to diplomatically make comments on what we observe or what would be helpful. We only put those in if we are asked for them.
Challenges and Limitations

▪ Care needed to be taken to protect the identity and intellectual property of participating companies. Assuring participants of anonymity seemed to facilitate participation.

▪ Specific elements of the report can be taken out of context that is necessary to understand and interpret them.

▪ The client may focus just on one element (e.g. “the numbers”) without attending to the critical factors that contribute to the situation, the limitations of the research or the implications of focusing too much on that one element.

▪ There can be sensitivities regarding what is said and how.

▪ The reports may need to be written for a wide audience, and an audience that is not well versed in the CLB or intercultural issues. Writing the report in a way that contains the required detail and analysis without “losing” the reader can be challenging.

▪ Sometimes the researchers need to point out things that may not be welcome news to the client. Diplomacy and tact is important at this point. As one consultant put it, “you need to speak to the needs in a way that is not sugar coated but not offensive”.

Key Learnings

▪ It is never ‘just’ about language proficiency – other factors are at play and need to be addressed to solve the communication challenges identified in the research.

▪ The format, sections, content and focus of the final report need to be agreed to at the very beginning, as well as the process for reviewing, editing and approving the final report.

▪ Decide up front on a communication plan for the final report. For example, who will see what and how? Will the full report be made public or just the executive summary, or is this just for a select group of people? Will participants in the research be notified of the results? These are questions that need to be answered before the data collection begins.

▪ Involving stakeholders/project owners in reviewing drafts before the final document is prepared facilitates buy in and ownership of the results.

▪ There may be a need for some briefing notes or a ‘highlights’ document to present key points without expecting people to read the full report.

For Further Discussion

1. What responsibility do we have for informing the group being studied of the results of the research?

2. What responsibility do we have for informing the field through our research? If projects are publicly funded, how can other stakeholders (practitioners, trainers, related occupations/industries) benefit from this research?
Benefits of Benchmarking

All practitioners were able to name clear benefits of these research projects and suggested this work needs to be done for more occupations and/or college programs.

College Program Benchmarking

Researchers working in projects that have benchmarked the language demands of college programs noted that the benchmarking process:

1. Develops a common language throughout the college for describing the language demands of courses and programs. College staff members who are working outside of ESL develop a greater awareness of the language challenges that their courses present to ESL learners.

2. Informs and improves assessment and admissions procedures

3. Helps ESL learners develop clear pathways to their career goals. They can make realistic plans based on information about the language demands of their programs of choice.

4. Improves the chances of success for ESL learners enrolled in college programs

5. Informs ESL program staff and helps them to develop effective bridging programs so learners are better prepared when they enter college programs

6. Helps non-ESL instructors develop classroom strategies to better support ESL learners

7. Opens up conversation among college staff. One researcher commented that departments within the college tend to operate in 'silos' and the benchmarking process helped to foster dialogue across departments.

8. Builds understanding among/between departments. One researcher observed that college instructors used to expect the ESL program to “fix ESL learners” and send them to college programs when they were “fixed.” She noted that through the benchmarking process many instructors have come to realize that language acquisition is an ongoing process and that everyone is a language teacher.

Occupational Benchmarking

Occupational benchmarking projects varied considerably in terms of scope and purpose. Researchers identified the following benefits of occupational benchmarking projects:

1. ESL newcomers can develop realistic plans and pathways for integration into their field in Canada. It sets them up for success

2. Raises awareness in the occupational community about the importance and nature of language and language acquisition

3. Helps regulatory bodies and employers create policies that are fair and transparent
Comparative Analysis of CLB-Referenced Benchmarking Methods

4. Develops a heightened awareness on the part of regulators and employers of the issues faced by internationally educated professionals and a greater familiarity with the literature and background information on credentialing and language proficiency testing

5. Employers can hire employees feeling more confident that the language proficiency scores that potential employees present are appropriate for the language demands of the job (less risk, less concern for safety)

6. Regulatory bodies can use the findings to inform standard-setting and set guidelines for entry to practice

7. Provides an evidence base and validation for language proficiency cut scores and PLA processes

8. Provides a foundation for developing occupation-specific language assessment tools

9. Provides an opportunity to network and share resources among regulators, employers and other stakeholders in the credentialing and employment of internationally educated professionals

10. Provides anecdotal confirmation of the presence of inequitable obstacles for internationally educated professionals that are not related to language proficiency and which merit further investigation, acknowledgement and remedy

11. Helps programs introduce authentic and relevant workplace language and materials into the classroom

12. Provides a foundation for further research e.g. tracking of ESL professionals who re-enter their fields

Several researchers commented that the occupational benchmarking process opened a ‘Pandora’s box’ of requests from employers and industry for further training and support. For example, a project to benchmark the language demands of labourers in the food processing industry was undertaken in order to set language requirements for Temporary Foreign Workers coming into the province to work in that field. An unanticipated result of the project was a request from the Alberta Food Processors’ Association to develop a range of other supports for the industry. This included a photo dictionary, English in the Workplace (EWP) curriculum materials, a plain language guide and an interview package for overseas recruiters. The benchmarking process provides a wonderful opportunity but also sets up expectations.

A researcher working in a college setting commented that an occupational benchmarking project they undertook resulted in a number of requests for EWP courses and further training. The college set up some initial courses, which were extremely well-received but they only had the capacity to respond to the requests in an ad hoc way. They were not well-equipped to deal with the demand for this training in a planned and sustained way which would have had greater benefits in the longer term.
Recommendations for Consideration

This research was always intended to be a foundation for further research and consultation. Comparing and describing benchmarking methods was seen as means of informing the practice of occupational language benchmarking and facilitating discussion and reflection on how and why this work is done. The bulk of this report describes that discussion and reflection. Where does it leave us? What next steps should be considered to continue the conversation?

There are five main recommendations emerging from this research, presented in order of priority:

Recommendation #1: Practitioner’s Forum

Every single person interviewed responded affirmatively and enthusiastically to the suggestion of bringing people who do this work together to discuss key issues related to the practice of benchmarking of an occupation or applied college program. There was a sense that each of the individuals or groups we interviewed are working in isolation, with little opportunity to talk to/learn from others. With interest in this practice growing and the types of applications becoming more “high stakes” in nature, it is time to establish some kind of forum for bring practitioners together. The number and complexity of these issues warrant a multi-day session. Any of the issues identified for further discussion under each stage of a benchmarking process could be considered as topics of discussion at such a forum, and this meeting would likely be a necessary starting point to the other four recommendations that follow. Issues that seem most pressing to discuss are:

• Ethical and Legal Considerations
  1. Is the CLB framework itself appropriate for such a high stakes purpose as establishing entry requirements to a profession?
  2. What are ‘valid’ or ethical and inappropriate (unethical) purposes for a benchmarking project?
  3. What are the legal implications of this type of benchmarking work?
  4. What are the ethical considerations of doing language proficiency assessments?
  5. Should anyone be allowed to do this work? Should there be training or qualifications of some kind for benchmarkers?

• Design Considerations
  1. How much/what type of information is sufficient to be able to say with confidence that these are the language demands of the occupation?
  2. What guidelines might be appropriate for estimating time and budget for a benchmarking project?
  3. Benchmarking experts generally stress the importance of triangulation – many sources of data. However, clients may insist on limiting data collection to save time/money. How to respond?
Comparative Analysis of CLB-Referenced Benchmarking Methods

- Data Analysis Considerations
  1. To what extent does using the CLB competency framework as a lens through which to categorize and analyze academic and occupational tasks limit what we observe? Are there some ways to use the framework in our data collection and analysis that are better than others?
  2. How and to what extent should members of the occupation be involved in determining the language proficiency that is ‘adequate’ for the job?
  3. Should a field expert review of authentic language samples to suggest what is ‘good enough’ performance be part of benchmarking projects?
  4. Is there a way to better relate readability analysis to the CLB Reading Benchmark descriptors? Which readability measures are most appropriate for use with academic or occupational text?
  5. Should analysis of the contextual factors that influence the language demands of an occupation or program become a standard component of the benchmarking process?
  6. Should there be some practices or minimum standards for analysis? E.g., a minimum of two people to arrive at the benchmarks?

Recommendation #2: Best Practices for Benchmarking

Key learnings suggested by researchers often focused on what is best, appropriate or advisable for a benchmarking project. The question of guidelines applies to all phases of a benchmarking process, as well as to the people conducting the research. Are there ‘best’ practices? Are there things that should always be done or never be done as part of benchmarking? Is there latitude for certain choices in a benchmarking initiative? This research suggests that the answer is yes, and that there is a need to define these to ensure good and ethical practice. Guidelines for benchmarkers and/or for benchmarking projects would do much to ensure that as these kinds of projects grow in quantity, they grow in quality as well. They would also provide a ‘yardstick’ for consultants to evaluate the feasibility and merit of proposed projects.

Recommendation #3: Practitioner Training

Practitioners identified a core set of skills or expertise that anyone doing this research should have. At the same time, many identified ‘capacity’ of qualified researchers as a certain limitation for doing this kind of work. From time to time, training sessions/workshops have been conducted by organizations for specific clients and projects:

- Red River College conducted several workshops for How to Benchmark an Occupation not only with practitioners in Manitoba but also with the interprovincial team for a national project (Red Seal) conducted by the CCLB
- RRC researchers conducted workshops at Vancouver Community College - How to Benchmark College Programs
- The CCLB conducted a benchmarking training program for English and French colleges in Ontario for the CIITE project and delivered 22 Ontario-wide Orientation
Comparative Analysis of CLB-Referenced Benchmarking Methods

to CLB Benchmarking workshops for a wider body of college personnel (e.g., senior management, deans, counsellors, librarians, etc.)

• Vancouver Community College has conducted workshops with other institutions related to benchmarking college programs

However, there is currently no ongoing, accessible training program in Canada that provides an overview of different approaches to benchmarking and the basic skills and knowledge to do a benchmarking project. If the trend towards more benchmarking and wider applications of the process continues, more individuals will need to be trained and ready to do this work well. This report could be the first step in a needs analysis to create such training that is accessible and affordable for researchers.

Recommendation #4: Sharing what we Know and Learn

Many of the researchers identified key learnings from each project. This reflective learning is admirable but limited, if it is never shared, and if practitioners are limited to their own experiences. Much could be gained by sharing of reports, lessons learned, successes and failures. However, it is often the case that reports are not made public, and client confidentiality prohibits consultants from sharing anything more than basic information. What responsibility do we have for informing the field through our research? If projects are publicly funded, how can other stakeholders (practitioners, trainers, related occupations/industries) benefit from this research? Options should be considered for a means of sharing information within these constraints — through a forum, an online chat room or discussion group, for example.

Recommendation #5: Further Research

Further research and development is needed in several key areas related to benchmarking initiatives:

• Longitudinal research to determine the effectiveness of the CLB framework for high stakes purposes such as occupational benchmarking

• Research into if and how communicative proficiency increases in a workplace or applied program context. As one researcher put it, “We have this assumption that people are building language as they go through an applied program or the workplace – we don’t know if this is true and how much.”

• Research into alignment of tests to the CLB – either occupation-specific tests or language proficiency tests. That application of benchmarking was out of scope for this project, but is an area of growing interest, and a comparative analysis of the processes and issues inherent in that kind of work would be beneficial.

• Research to develop language proficiency assessment tools that are better suited to workplace applications
Comparative Analysis of CLB-Referenced Benchmarking Methods

References


Adult Language Training Branch, Manitoba Labour and Immigration (2003). *Canadian Language Benchmarks: A Summary of Courses, Programs, Occupations and Tests that have been Benchmarked in Manitoba*: Adult Language Training Branch, Manitoba Labour and Immigration, Winnipeg, MN.


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Imai, H. & Hardy, D. (2009) *Benchmarking Initiative, a Presentation to TESL Ontario 2009*

Kingdon, B. (2009). *Analyzing the Language Demands of College Programs and Occupations/Professions,* a PowerPoint presentation at the TESL Canada Conference, October 2009, Banff, AB.


Luca, A. (2003). *Using the Canadian Language Benchmarks for Placement and Admission to the Health Care Aide programs at NorQuest College and other Post-Secondary Institutions in Alberta, Public Report,* Edmonton, AB.
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Strachan, A. (2007). English language proficiency and internationally educated medical laboratory technologists: An investigation of language benchmarks and assessment tools for IEMLT success: Canadian Society for Medical Laboratory Sciences


Vancouver Community College (2006). Job Activity Language Analyses (JALAs): A collection of language samples from engineering and technology: Province of British Columbia
## Appendix 1 - Comparative Framework: Data Collection Template

<table>
<thead>
<tr>
<th>Topic</th>
<th>Title</th>
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<tbody>
<tr>
<td>Project Owner/Lead Partners</td>
<td></td>
</tr>
<tr>
<td>Funder</td>
<td></td>
</tr>
<tr>
<td>Consultants/Researchers</td>
<td></td>
</tr>
<tr>
<td>Key Contacts</td>
<td></td>
</tr>
<tr>
<td>Development Timeframe</td>
<td></td>
</tr>
<tr>
<td>References/Reports</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Context</td>
<td></td>
</tr>
<tr>
<td>Purpose &amp; Objectives</td>
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</tr>
<tr>
<td>Stakeholder Involvement</td>
<td></td>
</tr>
<tr>
<td>Team Structure</td>
<td></td>
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<tr>
<td>Resource Requirements</td>
<td>Time:</td>
</tr>
<tr>
<td></td>
<td>People:</td>
</tr>
<tr>
<td></td>
<td>Expertise:</td>
</tr>
<tr>
<td>Overall Process Flow</td>
<td></td>
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<tr>
<td>Data Collection</td>
<td></td>
</tr>
<tr>
<td>□ Interviews:</td>
<td></td>
</tr>
<tr>
<td>□ Job Incumbent/Student</td>
<td></td>
</tr>
<tr>
<td>□ Supervisor</td>
<td></td>
</tr>
<tr>
<td>□ Trainer/Instructor</td>
<td></td>
</tr>
<tr>
<td>□ Training/Program Coordinator</td>
<td></td>
</tr>
<tr>
<td>□ Key Informant</td>
<td></td>
</tr>
<tr>
<td>□ Subject Matter Expert</td>
<td></td>
</tr>
<tr>
<td>□ Shop Steward</td>
<td></td>
</tr>
<tr>
<td>□ HR Manager</td>
<td></td>
</tr>
<tr>
<td>□ Client/Customer</td>
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</tr>
<tr>
<td>□ Co-worker</td>
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<tr>
<td>□ Fellow student</td>
<td></td>
</tr>
<tr>
<td>□ Other</td>
<td></td>
</tr>
<tr>
<td>□ Focus Groups:</td>
<td></td>
</tr>
<tr>
<td>□ Job Incumbents/Students</td>
<td></td>
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Comparative Analysis of CLB-Referenced Benchmarking Methods

<table>
<thead>
<tr>
<th>Data Analysis</th>
<th>Assigning Benchmark Levels</th>
<th>Outcomes</th>
<th>Appropriate Uses</th>
<th>Challenges/Limitations</th>
<th>Benefits/Outcomes</th>
<th>Personal Observations</th>
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<td>□ Observation</td>
<td></td>
<td>□ Document Review</td>
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<tr>
<td>□ Supervisors</td>
<td>□ Worksite</td>
<td></td>
<td>□ Essential Skills Profile</td>
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<td></td>
<td></td>
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<tr>
<td>□ Trainers/Instructors</td>
<td>□ Classroom/Training Sessions</td>
<td></td>
<td>□ National Occupational Standards/Analysis</td>
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<td></td>
<td></td>
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<td>□ Training/Program Coordinators</td>
<td>□ Job Shadowing</td>
<td></td>
<td>□ Orientation/Employment Materials</td>
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<tr>
<td>□ Key Informants</td>
<td>□ Meetings</td>
<td></td>
<td>□ Procedures/Policy Documents</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Other</td>
<td></td>
<td>□ Learning Materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Other</td>
<td></td>
<td>□ Tests</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>□ Language Proficiency Assessment</td>
<td></td>
<td>□ Other</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>□ Formal (e.g., CLBPT)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Informal</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>

Outcomes

Appropriate Uses

Challenges/Limitations

Benefits/Outcomes

Personal Observations

Data Analysis
# Appendix 2 - CCLB-N Observation Analysis Chart*

**LANGUAGE SKILL: SPEAKING**

**TIME:** 9 am to 12 pm  
**DAY:** Tuesday  
**UNIT:** Surgery  
**DESIGNATION:** RN

<table>
<thead>
<tr>
<th>INTERACTION WITH:</th>
<th>COMFORTS/REASSURES</th>
<th>ASKS FOR CLARIFICATION</th>
<th>PARTICIPATES IN DISCUSSION</th>
<th>EXPLAINS</th>
<th>DESCRIBES</th>
<th>INFORMS</th>
<th>ASKS FOR INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLIENT</td>
<td>✓✓✓</td>
<td>✓</td>
<td>✓</td>
<td>✓✓✓✓✓✓✓✓✓</td>
<td>✓</td>
<td>✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓✓</td>
<td></td>
</tr>
<tr>
<td>PROFESSIONAL</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLIENT’S FAMILY/ FRIEND(S)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INTERACTION WITH:</th>
<th>ASKS FOR HELP</th>
<th>OFFERS HELP</th>
<th>GIVES INSTRUCTIONS</th>
<th>APOLOGIZES</th>
<th>SUGGESTS/ CONVINCES</th>
<th>SMALL TALK</th>
<th>PHONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLIENT</td>
<td>✓</td>
<td>✓</td>
<td>✓✓✓✓✓</td>
<td>✓</td>
<td>✓✓✓✓✓</td>
<td>✓</td>
<td>ASKS FOR INFO</td>
</tr>
<tr>
<td>PROFESSIONAL</td>
<td>✓</td>
<td>✓</td>
<td>✓✓✓✓✓</td>
<td>✓</td>
<td>✓✓✓✓✓</td>
<td>✓</td>
<td>TAKES MESSAGE</td>
</tr>
<tr>
<td>CLIENT’S FAMILY/ FRIEND(S)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>DISCUSES REQUEST</td>
</tr>
</tbody>
</table>

**COMMENTS:** RN was working with a student nurse; RN sometimes has to call physician after hours. ___________________________________________

______________________________________________________________________________________________________________________________

---

*Source: Centre for Canadian Language Benchmarks; *Benchmarking the English Language Demands of the Nursing Profession Across Canada*, Appendix J
### Appendix 3 - ALDO Process - Observation Template for Speaking and Listening*

<table>
<thead>
<tr>
<th>Social Interaction</th>
<th>Instructions</th>
<th>Suasion</th>
<th>Information</th>
</tr>
</thead>
</table>

*Source: Analyzing the Language Demands of an Occupation: A Guidebook, Appendix 12*
Appendix 4 – VCC Program Faculty Interview Tool*

Program Faculty Interview Tool

1 What are the present language proficiency entrance requirements for your program?

2 Which areas of language proficiency are presently not measured adequately?

3 How many ESL students participate in the program? Approximate percentage?

4 What percentage of ESL students experience difficulty?

5 Speaking: Which situations require speaking in the program? What proportion of the course requires speaking? e.g. interacting with the instructor or with other students, participating one-on-one, in groups or committees, performing role-play, working with others in labs, conducting training, giving presentations?

6 Listening: Which situations require listening in the program? What proportion of the course requires listening? e.g. listening to lectures, watching videos, interacting with the instructor or with other students, participating one-on-one, in groups or committees, performing role-play, working with others in labs, conducting training, giving presentations?

7 Reading: What do students read as a part of the course? E.g. textbooks, reports, manuals, articles, charts, diagrams, plans, timetables, training materials, on-line computer help, other.

8 Writing: What are students required to write as part of the course? Reports? Length? Short answers on quizzes or tests, lecture notes, resumes, memos, email, journals, items in charts, diagrams, graphs, plans, schedules, other.

9 In which other areas do ESL students experience difficulty? In your experience, what factors affect second language learner’s ability to participate successfully in this program or course?

10 What skills or attributes have you observed in individual ESL students that help them succeed in your program or course?

Comparative Analysis of CLB-Referenced Benchmarking Methods

Appendix 5 – CCLB Nursing Project Survey Excerpt

SURVEY OF LANGUAGE TASKS FOR THE NURSING PROFESSION IN CANADA

Please indicate how important it is for nurses in your position to perform the following language tasks with (1) being not important and (5) being extremely important.

1. not important
2. somewhat important
3. important
4. very important
5. extremely important

**SPEAKING AND LISTENING**

<table>
<thead>
<tr>
<th>IMPORTANCE</th>
<th>SPEAKING/LISTENING TASKS: SOCIAL INTERACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5</td>
<td>1. Express sympathy formally.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>2. Respond to a minor conflict or complaint.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>3. Comfort or reassure a person in distress.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>4. Express and respond to expressions of respect, friendliness, distance and/or indifference.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>5. Respond to perceived hostility, blaming, putdowns, sarcasm, condescension/patronizing or lies in social interaction.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>6. Express and respond to negative value judgements/criticism.</td>
</tr>
</tbody>
</table>

**CONVERSATION MANAGEMENT**

<table>
<thead>
<tr>
<th>IMPORTANCE</th>
<th>SPEAKING/LISTENING TASKS: SOCIAL INTERACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5</td>
<td>7. Change the topic.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>8. Manage conversation; make sure that you understand others and that they understand you (e.g., ask for clarification about a doctor’s order).</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>9. Encourage others to participate.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>10. Contribute to/co-manage a discussion and/or debate (e.g., discussion with other health care professionals regarding a decision related to a patient during rounds).</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>11. Contribute to/co-manage a discussion and/or debate in a large formal familiar group (e.g., an interdisciplinary group meeting discussing patient care plans).</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>12. Lead/chair a discussion or a debate in a formal group (e.g., at a medical conference).</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>13. Recognize and prevent conflict-escalating language behaviour by reframing negative statements (e.g., during a family conference with health professionals).</td>
</tr>
</tbody>
</table>

**PHONE COMPETENCIES**

<table>
<thead>
<tr>
<th>IMPORTANCE</th>
<th>SPEAKING/LISTENING TASKS: SOCIAL INTERACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5</td>
<td>14. Ask for information about the availability of services.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>15. Take and pass on a message with specific details for someone else.</td>
</tr>
<tr>
<td>1 2 3 4 5</td>
<td>16. Discuss unfamiliar topics by telephone (e.g., coordinating the transfer of a patient).</td>
</tr>
</tbody>
</table>

*Source: Centre for Canadian Language Benchmarks: Benchmarking the English Language Demands of the Nursing Profession Across Canada, Appendix 64*
Appendix 6 - Excerpt: OLA for In-Store Cake Decorator*

I. Social Interaction

Interpersonal Competencies

Greet, introduce self and ask about the other person. (CLB 3)
- remember the names of regular customers and greet them by name when providing service (ES-TS)
- greet customer, e.g., smile, make eye contact, greet verbally (NOSC-A3.1)

Take leave appropriately. (CLB 4)
- acknowledge departing customer, e.g., thank them, invite them back (NOSC-A3.1)

Express and respond to compliments or congratulations. (CLB 5)
- give encouragement and positive feedback to team members (NOSC-A1.4)
- recognize successful completion (NOSC-A2.3)

Express/respond to apology, regrets and excuses. (CLB 6)
- [explain] to customers when a cake can/cannot be made for the time requested (ES-TS)
- apologize for error or inconvenience: accept responsibility for own mistakes, e.g., do not offer excuses, do not blame others (NOSC-A3.2)

Respond to a minor conflict or complaint. (CLB 8)
- speak to the person who took the order to attempt to clarify the customer’s requirements. If this is unsuccessful, the decorator may contact the customer directly to solve the issue (ES-TS)
- contact the bakery manager immediately in order to prevent production shortfall and maintain product quality and alert the organization to a potential problem (ES-TS)
- may have to handle situations where customers have arrived at the store to pick up a cake order and there is no cake; asking the customer questions such as ‘which store did you place the order with?’ (ES-TS)

Conversation Management

Confirm own comprehension. (CLB 7)
- paraphrase or ask questions to confirm understanding (NOSC-A1.3)
- communicate expectations clearly: confirm understanding (NOSC-A2.3)
- confirm understanding, e.g., ask questions or paraphrase to clarify information (NOSC-A3.1)
- confirm understanding, e.g., paraphrase (NOSC-A3.2)

Phone Competencies

Carry on a brief phone conversation in a professional manner. (CLB 8)
- call customers with special cake orders to confirm or clarify customers’ requests (ES-OC)
- talk to customers over the telephone and in person to greet them, discuss service needs, concerns or complaints and to resolve issues. The customers can be emotional if they feel their needs have not been met (ES-OC)
- order supplies; contact supplier to provide purchase order number; provide types and number of items; confirm delivery date, if necessary (NOS-A2.1)

II. Instructions

Give sets of simple everyday instructions and directions. (CLB 4)
- describe systems of measurement, e.g., metric, imperial, U.S. (NOSC-D1.3)

Give an extended set of sequentially presented simple clause instructions/directions on daily routine actions. (CLB 5)

* Source: Reproduced with permission from the CCLB, www.itsessential.ca
Appendix 7 – Sample JALA *

Job Activity Language Analysis:

3.3 Take phone message

Technologist: Environmental Engineering

Job Activity: Technologist takes phone message

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Language Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Speaking</strong></td>
<td></td>
</tr>
<tr>
<td>Answered phone – 2 minutes</td>
<td>Hello, [name of company].</td>
</tr>
<tr>
<td></td>
<td>No, he’ll be back soon.</td>
</tr>
<tr>
<td><strong>Listening</strong></td>
<td></td>
</tr>
<tr>
<td>Answered phone – 2 minutes</td>
<td>Hello, [name of company].</td>
</tr>
<tr>
<td></td>
<td>No, he’ll be back soon.</td>
</tr>
</tbody>
</table>

Competencies (Canadian Language Benchmarks 2000 Descriptors)

All CLB descriptors are taken directly from the “What a person can do” column in the Canadian Language Benchmarks 2000 document.

**Speaking**

Phone Competencies

• Answer the phone briefly according to the situation (5)

**Listening**

Social Interaction

• Identify specific factual details and inferred meanings in dialogues containing openings and closings, making and cancelling of appointments, apologies, regrets, excuses, problems in reception and communication. (6)

**Socio Cultural Competency Considerations**

Responsibility to communicate another persons whereabouts (putting clients needs first)

**Performance Conditions**

On the phone, brief interaction

**Curricular Considerations**

Listening skills on the phone: identifying the important information for taking a message.

*Source: Vancouver Community College, Job Activity Language Analyses (JALAs): A collection of language samples from engineering and technology.
Appendix 8 – Consulting Team

**Karen Hammond** is a consultant in workforce learning and development, English in the Workplace and essential skills. Before starting her consulting company in 1998, Karen taught adult ESL and English in the Workplace for 11 years at Bow Valley College. Karen partnered with Vancouver Community College in the development of the Occupational Language Analysis (OLA) methodology for the CCLB and has developed OLAs for multiple sectors, including retail, food processing, food services, tourism, construction, biotechnology and early childhood education. She also collaborated with Tara Holmes in writing *Analyzing the Language Demands of Occupations: A Guidebook* based on pilots with workers in food processing, construction, food services and the electrical trade. Karen has a B Ed, a Graduate Diploma in Curriculum & Instructions specializing in ESL, a Masters of Education in Educational Leadership and is ATESL certified.

**Tara Holmes** has extensive experience in the field of ESL as a teacher, program manager and consultant. She has worked with the CLB since 1996 and has authored and co-authored several classroom and curriculum resources, including *Integrating CLB Assessment into your ESL Classroom and CLB 2000: A Guide to Implementation*. She has led and collaborated on in-service initiatives across the country to introduce classroom-based assessment processes to Adult ESL teachers. Tara holds a B. Ed, an MA and has recently completed a PhD in Education. Her qualitative research study explored the transition experience of immigrant professionals.