

# Final Report

**A Study to Investigate, Analyse &  
Organize Community-Based Training  
Roles in Canada**




**Canadian Coalition of  
Community-Based Training**

with assistance from:



**Human Resources  
Development Canada**

**Développement des  
ressources humaines Canada**



This report was prepared for the Canadian Coalition of Community-Based Training (CCCBT) by the Life-Role Development Group Limited under the direction of the CCCBT's National Steering Committee for the Human Resources Study of the Community-Based Training Sector.

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December 2000

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# executive summary

## a time of change

The Community-Based Training (CBT) sector has faced significant change in Canada in recent years, and there are few signs that changes affecting the sector will subside.

The world of work, for which CBT prepares clients, is changing quickly and significantly. Work roles are changing rapidly, and even such basics as employability skills are in flux.

The infrastructure that supports CBT has also changed dramatically. Federal systems of funding have changed and will continue to change, and many training responsibilities have devolved to the provinces, each with its own set of norms, rules and expectations.

The trend toward privatization has resulted in numerous other players including colleges, school boards and private trainers, becoming actively involved in the delivery of traditional CBT services.

These changes place significant pressure on CBT providers to continuously increase funding targets and rapidly develop and change curriculum. And to succeed in a competitive environment, CBT providers need to dedicate more effort to marketing and sales.

## our goal

In order to meet the challenges of change and strengthen the CBT system, the Canadian Coalition of Community-Based Training initiated a study to define the nature of CBT work. The study's goal was to develop a job classification system and a description of roles,

responsibilities and activities within the CBT sector.

The classification system would provide a framework for human resource requirements within the sector and set the stage for more detailed analysis in the future.

## our plan

To develop this classification system and Job Chart, the study included:

- a literature review on work analyses of the CBT and related sectors, and
- regional focus groups to identify differences between CBT providers and for-profit and institutional providers.

## the results

### Literature review provides little information

The worldwide Internet and print literature search provided little information on models for understanding the work within the CBT sector. This may be because studies on the structure of work within CBT and related areas have not been undertaken or studies have been done but the results have not been made available. Many other countries do not have a CBT sector either because CBT work is provided by government staff or they do not differentiate CBT providers from other providers.

### Focus groups identify functions

Focus group sessions with CBT practitioners across Canada identified six major functions and 19 sub-functions, as well as four skill levels, within the CBT sector. Summary role descriptions start on page 28 and a Job Chart accompanies this report.

## focus groups' views of CBT and other providers

### Who CBTs serve

*Marginalized clientele:* CBTs are more likely than private providers or institutions to focus their efforts on marginalized clients. CBT providers felt that they accepted clients on the basis of need, not likelihood of success.

*The community:* CBTs serve the community and families, as well as individual clients, doing so from a ground-up approach.

### How they serve

*Holistically:* CBTs attempt to be client servers. Private providers and institutions tend to be service providers – whether or not the clients need the service or need more than simply the service. CBT staff feel they have more control over their work than other providers.

*Flexibly:* CBTs are better able to quickly respond to changing community needs than institutions or private providers.

*Preventatively:* CBTs have as much interest in preventing client issues as in helping resolve them.

*Cost-effectively:* CBTs feel they devote more funding to providing service and less to overhead (marketing, equipment, administration) than private or institutional providers. Participants claimed that about 90% of their funding went directly to service.

### When they serve

*Long-term:* CBTs tend to serve clients for the long-term, regardless of program start and end dates. Staff

feel more security because service is not simply project-based.

### Why they serve

*Client/community well-being:* CBTs' primary motivation is the well-being of clients and communities. Their aim is to become obsolete.

### Where they serve

*Where the clients are:* CBTs try to locate themselves as close to clients as possible.

*Within a community network:* CBTs operate within a community network. They involve clients, other service providers, government and community groups in their planning and operations.

Focus group participants noted that:

- as funding criteria change throughout the country, the distinctions between CBT providers and other providers are rapidly becoming reduced;
- funding is increasingly outcome-driven, forcing all providers to plan and operate in a more similar way than in the past;
- many participants have operated within the CBT sector for a long time and may not have a clear sense of the workings and motivations of related providers;
- the results only identify the CBT view of the CBT sector;
- private sector and institutional providers were not able to defend themselves in this study.

## job chart shows unique characteristics of CBT sector

One purpose of this study was to determine the common and unique characteristics of the CBT sector. A review of the Job Chart shows that most functions are shared by other employability facilitators, career development providers, literacy educators and educational/counselling providers.

What may make the CBT sector unique are its:

- advocacy and awareness sub-function;
- volunteer management sub-function;
- resource development sub-function, and
- active use of a Board skill level.

### The Study's Seven Recommendations

- 1** The Canadian Coalition of Community-Based Training will benefit from continuing to refine the Job Chart. This will require broad validation within the CBT community to ensure support for the model.
- 2** Further delineation of tasks and competencies should follow a functional rather than occupation-specific analysis. The work of the Career Development Guidelines and Standards project can provide a process and some content for doing this. The CBT sector may contribute to the Guidelines and Standards by analysing indirect functions (see Recommendations 3-6).
- 3** Focus on Board development and involvement. Effective Boards can be an enormous asset. However, Board members are often not well selected nor do they have the competence required to be effective.
- 4** Focus on developing resources and the competencies associated with them. CBT providers will be in a tenuous position financially and morally if they attempt to operate with funds available to other providers.
- 5** Focus on volunteer management and the competencies/systems associated with it. Volunteers are an asset other providers rarely possess.
- 6** Focus on advocacy and awareness and the competencies associated with them. This may be the most defining feature of the CBT sector.
- 7** Develop/refine a preferred future or vision for the CBT sector and actively move toward it, especially from a human resources perspective.

## background

The Community-Based Training (CBT) sector has faced significant change in Canada in recent years, and there are few signs that changes affecting the sector will subside.

The world of work, for which CBT prepares clients, is changing quickly and significantly. Work roles are changing rapidly, and even such basics as employability skills are in flux.

The infrastructure that supports CBT has also changed dramatically. Federal systems of funding have changed and will continue to change, and many training responsibilities have devolved to the provinces, each with its own set of norms, rules and expectations.

The trend toward privatization has resulted in numerous other players including colleges, school boards and private trainers, becoming actively involved in the delivery of traditional CBT services.

These changes place significant pressure on CBT providers to continuously increase funding targets and rapidly develop and change curriculum. And to succeed in a competitive environment, CBT providers need to dedicate more effort to marketing and sales.

In order to meet the challenges of change and strengthen the CBT system, the Canadian Coalition of Community-Based Training initiated a study to define the nature of CBT work. The study's goal was to develop a job classification system and a description of roles, responsibilities and activities within the CBT sector.

The classification system would provide a framework for human resource requirements within the sector and set the stage for more detailed analysis in the future.

The Life-Role Development Group conducted the requested research under the direction of the CCCBT's National Steering Committee for HR Study of the Community-Based Training Sector. This report describes the method and results of this research.

## deliverables

The intentions of the study were to produce:

- a worldwide English literature review of the education and training sector, as well as related sector classification systems;
- a Job Chart for the CBT sector that defines skill levels and functions within CBT and provides common names for describing CBT roles, as well as showing the relationships between these roles;
- summary profiles of core CBT roles, including main duties, functions, tasks and competency (skill, knowledge, attitude) sets required for the roles;
- an analysis of the characteristics that CBT roles have in common with related roles and the characteristics unique to CBT roles; and
- a report that incorporates these deliverables as well as:
  - a description of methodology including focus group protocol;
  - the results of focus groups held across Canada (outcomes, members, level of buy-in, additional issues); and
  - a description of two or three additional classification models that might be used for the CBT sector, with a rationale for each.<sup>1</sup>

## methods

### 1. A literature review

A worldwide literature review of English journal articles, books, reports and Internet sites was conducted in order to find existing classification systems used within the education and training sector. The main purpose of the review was to discover classification structures that could apply well to the CBT sector and to find any work that had already been completed on defining the CBT sector or parts of it. A limited review of French literature was also conducted.

The full details of this search method are contained in part 2 of this report

### 2. Development of a Job Chart

A Job Chart of the CBT sector was developed from information obtained through focus groups held in Victoria, Edmonton, Calgary, Ottawa, Montreal and Moncton. The Job Chart shows the sector and the relationship between roles within the sector. It portrays the skill/responsibility levels and the functions performed within the sector. Specific roles are presented in the chart by skill level and function. The roles are further described in terms of their functions and tasks.

The full details of this method, as well as the results, are described in part 3 of this report.

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<sup>1</sup> As discussed in the literature review, no alternative classification models for delineating the sector were found.

### **3. Conducting regional focus groups**

The focus group sessions, as well as contributing to the Job Chart, identified the level of support for the initiative and additional issues that may have an impact on the study as a whole. In particular, focus group participants were asked to identify their perceptions of differences between CBT providers and for-profit and institutional providers.

These findings are discussed in part 3 of this report.

### **4. Developing a final report**

As well as describing the methods used in this study and the results derived from them, this report describes both common and unique characteristics of CBT functions, as compared to other sectors.

The discussion of the features of CBT is in part 4 of this report.

## **definitions**

A few terms used throughout this report can have varied meanings. In this report, these terms mean:

**Client:** Individuals served directly by CBT providers.

**Competency:** Skills, knowledge and attitudes used in the broadest sense of abilities. This term does not imply a specific framework (e.g., competency-based education, competency profiles) that may have other connotations.

**Funder:** The organization paying the provider to deliver a service and/or reach an outcome.

**Outcome-Based Funding:** Funding that is based on the outcomes achieved by the client within a service (e.g., \$5000 per client who gains employment).

**Participant:** Individuals who participated in this study's focus groups.

**Service-Based Funding:** Funding that is based on providing a service or intervention (e.g., \$500 per client for a work search workshop).

**The Group:** The Life-Role Development Group Limited who were contracted to conduct this study.

# 2

## literature & Internet search

### background

As the first step in its study, the Life-Role Development Group undertook a worldwide literature review of English journal articles, books, conference papers, theses and Internet sites, and a limited review of French publications and Internet sites.

The purpose of the review was to find existing classification systems used within the education and training sector, as well as in related sectors, such as career development, literacy and human resources. The main focus of the review was to find classification structures that might apply to the CBT sector. Another intent was to find any work that had already been completed describing the CBT sector or portions of it.

**Note:** The literature review did not attempt to find competency profiling or job analysis systems that might apply to the CBT sector. Its focus was defining and/or classifying the CBT sector. There is however, a considerable amount of work currently being done on defining competency in the career development, life skills and literacy communities. This work will be relevant when following up on recommendations from this study.

### search methods

#### 1. Electronic Databases

The aim of searching electronic databases was to find both print and audiovisual sources (including books, articles, conference papers, speeches, theses and videocassettes) dealing with the description of CBT work and classification systems applicable to the CBT sector.

The following databases were searched online through the Athabasca University Library <[www.athabascau.ca/library](http://www.athabascau.ca/library)>. This library was selected because Athabasca University is primarily a national distance-delivery institution that has put significant effort into linking to other information sources.

**Table 1. Database Names**

<b>Database Name</b>	<b>Contents</b>
ArticleFirst	Journal tables of contents
ERIC	Educational materials
PapersFirst	Individual papers presented at conferences worldwide
ProceedingsFirst	Tables of contents of papers presented at conferences worldwide
Wilson Omni	Journal articles including business and education
WorldCat	Books and other materials in libraries worldwide

**Table 2. Search Terms**

<b>Root Term</b>	<b>Delimiting Terms</b>
community-based	<ul style="list-style-type: none"><li>• training</li><li>• providers</li></ul>
volunteer	<ul style="list-style-type: none"><li>• sector</li><li>• management</li><li>• association</li></ul>
non-profit	<ul style="list-style-type: none"><li>• sector</li><li>• organizations</li></ul>
not-for-profit	<ul style="list-style-type: none"><li>• sector</li><li>• organizations</li></ul>
training	<ul style="list-style-type: none"><li>• for employability</li><li>• vocational</li></ul>

**Table 3. Citations from Databases**

<b>Author/ Editor</b>	<b>Title</b>	<b>Date</b>	<b>Format</b>	<b>Request</b>
Bygrave, W., et al	Toward a non-for-profit analytical framework	1996	Conference paper	
Campbell, D.	The voluntary non-profit sector: an alternative	1993	Book	
Cockcroft, P.	Training structures in the community based sector	1988	Book	✓
Dangor, Z.	The non-profit sector in South Africa	1997	Book	
Eisenberg, P.	The crisis in the American non-profit sector	1995	Book	
McCarthy, K., et al	The non-profit sector in the global community: voices from many nations	1992	Book	✓
<i>New Careers Training Laboratory, Center for Advanced Study in Education, The Graduate School and University Center of the City University of New York</i>	Career ladders and a training model for the (re)training of direct service workers in community based programs for the developmentally disabled	1979	Book	✓
Norton, M.	The non-profit sector in the UK	1997	Book	
O'Connell, B.	The independent sector: uniquely American	1982	Article	✓
Osborne, S.	The voluntary and non-profit sector in contemporary Japan: an emerging response to a changing society	1998	Book	

<b>Author/ Editor</b>	<b>Title</b>	<b>Date</b>	<b>Format</b>	<b>Request</b>
Roberts, R.	Paraprofessionals employed in community-based settings: a survey of perceived critical skills and training needs	1990	Thesis, Memphis State University	✓
Salaman, L.	Beyond the paradigm of conflict: rethinking the role of the non-profit sector in the modern welfare state	1996	Video-cassette	
Salamon, L.	Defining the non-profit sector: a cross-national analysis	1997	Book	
Sharpe, D.	Preparing for a changing world: demographics, psychographics and the Canadian charitable non-profit sector	1991	Book	
Todaro, A., et al	A model for training community-based providers for children with special health care needs	1993	Article	
Ulbrich, H.	Non-profits, businesses, and governments: the role of the volunteer sector in a mixed economy	1989	Book	
Wernet, S.	Not-for-profit organization; organizational structure and critical events	1989	Conference paper	
Wholey, J., et al (Eds.)	Performance and credibility: developing excellence in public and non-profit organizations	1986	Book	✓

✓ indicate those requested from the Athabasca University Library.

*Italicized authors indicate those received and submitted in hardcopy form to CCCBT.*

A hardcopy of detailed citations from the databases for further bibliographic information on each citation was also submitted.

## 2. Print Materials

The aim of searching printed material was to find articles on library shelves relating to the CBT sector. A search was conducted at the Alberta Learning Library, Commerce Place, Edmonton. This library subscribes to approximately 300 journals and newsletters. For each of the periodicals listed in Table 4, the display copy and past issues back to 1995 — when available — were scanned. The library did not have an annotated index of periodicals.

**Table 4. Selected Periodicals**

<b>Journal/ Newsletter</b>	<b>Publisher</b>	<b>Place</b>	<b>ISSN</b>
Canadian Journal of Rehabilitation	Canadian Association for Research in Rehabilitation	University of Alberta, Edmonton, AB	08280827
Career Planning and Adult Development Journal	Career Planning and Adult Development Network	San Jose, CA	07361920
European Journal of Vocational Training	European Centre for the Development of Vocational Training	Belgium	None
Journal of Career Development		Columbia, MO	8948453
Journal of Career Planning and Employment	National Association of Colleges and Employers	Bethlehem, PA	08845352
Journal of Employment Counseling	National Employment Counseling Association	Alexandria, VA	00220787
New Directions for Adult and Continuing Education: The Welfare-to-Work Challenge for Adult Literacy Educators, Number 83, Fall 1999	Jossey-Bass	San Francisco, CA	10522891
Report on Literacy Programs: Biweekly Newsletter on Basic Skills and Workplace Literacy	Business Publishers Inc.	Silver Spring, MD	10466150
The Canadian Journal for the Study of Adult Education	Canadian Association for the Study of Adult Education	St. Francis Xavier University, Antigonish, NS	08354944
The Career Development Quarterly	The National Career Development Association	Alexandria, VA	

**Table 5. Selected Print Articles**

<b>Author(s)</b>	<b>Title</b>	<b>Date</b>
<i>Folkman, D. and Rai, K.</i>	The New Role of Community-Based Agencies	Fall 1999
<i>Dirkx, J.</i>	New Skills for Literacy Educators	Fall 1999

These articles were selected from *New Directions for Adult and Continuing Education: The Welfare-to-Work Challenge for Adult Literacy Educators*, Number 83, Fall 1999.

These have been submitted in hardcopy form to the CCCBT.

### **3. Internet**

The purpose of searching the Internet was to identify potentially helpful organizations through their websites and to contact individuals within those organizations. Attempts were made to contact government and regulating organizations, funding agencies, associations, scholars and individual for-profit and not-for-profit providers.

The terms from Table 2, on page 8, were combined with the names of Australia, New Zealand, South Africa, UK, and USA to generate search terms.

An example is: <“community-based training” AND Australia>.

The search terms were then entered into the *AltaVista* and *Alltheweb* search engines. Next, e-mail messages requesting information specific to the search were sent to the identified websites. An e-mail message was also sent to the International Labour Office (ILO), Employment and Training Department, Geneva.

Most of the replies were from Australia and the United Kingdom. Over 30 e-mails were received and saved to disk; they are on file. A list of identified websites and e-mail logs for detailed results of this component of the search was submitted to the CCCBT in hardcopy form.

#### 4. French Internet

An Internet search was also conducted using French search terms. This search produced predominantly Canadian works created by Human Resources Development Canada or the CCCBT:

*The Second Century: community based training in Canada: human resource study* by Adam Lodzinski (Mtl 1997). (Vers un deuxième siècle de formation en milieu communautaire au Canada).

*Training that Works: a guide to effective community-based employment training practices* by Judy Johnson & Peter Morgan (People Development Limited) (1995). (La formation au travail).

*Community Strategic Planning Toolkit for Employment & Training*, HRDC, Ottawa, April, 1999. (Trousse de planification stratégique communautaire pour l'emploi et la formation).

*Évaluation du processus centre de ressources CR objectif Emploi*, HRDC, Sept. 1996.

*Impact économique de la formation en milieu communautaire*. ONESTEP, 1996.

### results

The purpose of this literature and Internet search was to find evidence through a systematic examination in English-speaking countries and a limited examination in French-speaking countries, of the community-based training sector or of its employees' roles and activities.

A small amount of potentially useful material was found. Perhaps more work has been done but not published.

The following comments summarize the results of the search, outline the difficulties and suggest additional reasons for the lack of results.

Six items were selected from the database search. They were requested from the Athabasca University Library. Table 6 shows the status of the requests at the time of submission of this report. Those that arrived have been submitted to the CCCBT in hardcopy form.

**Table 6. Status of Database Requests**

<b>Author/ Editor</b>	<b>Title</b>	<b>Date</b>	<b>Format</b>	<b>Status</b>
Cockcroft, P.	Training structures in the community based sector	1988	Book	Not located in any North American library.
McCarthy, K., et al	The non-profit sector in the global community: voices from many nations	1992	Book	
New Careers Training Laboratory, Center for Advanced Study in Education, The Graduate School and University Center of the City University of New York	Career ladders and a training model for the (re)training of direct service workers in community based programs for the developmentally disabled	1979	Book	Received
O'Connell, B.	The independent sector: uniquely American	1982	Article	Received
Roberts, R.	Paraprofessionals employed in community based settings: a survey of perceived critical skills and training needs	1990	Thesis, Memphis State University	Available only by purchase from Proquest Digital Dissertations
Wholey, J., et al (Eds.)	Performance and credibility: developing excellence in public and non-profit organizations	1986	Book	

Only two articles found in the Alberta Learning Library were selected for closer reading. They have also been submitted to the CCCBT in hardcopy form.

The editorial interests of the Library's journals and newsletters seem to lie in the areas of program design and delivery practices rather than in the distinctiveness and concerns of the not-for-profit sector in relation to the for-profit sector. These interests may also reflect the Library's mandate and collection policy.

Although several promising contacts were made during the Internet search, no material was located. Two American and two Australian contacts offered to make enquiries themselves and send more information but have not yet done so.

Other difficulties encountered in the Internet search include:

1. Potentially helpful organizations and individuals were not on the Internet, especially those located in the UK.
2. The status of organizations is often confusing. For example, in the UK some registered charities, such as schools, are for-profit; in Victoria, Australia, community providers are also registered with the state as private providers.
3. Training may not always be the core activity of a not-for-profit organization.
4. Differences in terminology make international communication difficult.
5. Websites and linked databases often do not distinguish between for-profit and not-for-profit.
6. Funding agencies from federal departments to community chests don't always distinguish between for-profit and not-for-profit.
7. At the time of the search, it was annual vacation season down under. Junior staff sometimes handled enquiries.

An Internet search might still yield results by:

- repeating the search at a later date, avoiding vacation season;
- phoning, rather than e-mailing or faxing, organizations and individuals in Canada and other countries. Phone calls may be harder to ignore than e-mails.

The Group will continue to handle any responses to e-mails and calls it has made and forward information to the CCCBT. It seems unlikely however, that useful information about models for structuring the CBT sector will be discovered.

This type of literature search might yield better results in a subsequent phase of this initiative when roles within the CBT sector have been fully profiled for functionality, competence and standards of performance. For example, the process currently being undertaken by the Canadian career development community under the auspices of the National Steering Committee for Career Development Guidelines and Standards ([www.career-dev-guidelines.org](http://www.career-dev-guidelines.org)) may well serve the CBT sector as a useful model for mapping competencies.

## background

The most relevant information gathered for this analysis emerged from focus group sessions with CBT leaders and practitioners in Victoria, Edmonton, Calgary, Ottawa, Montreal and Moncton. Given the lack of results from the literature review, the focus groups provided almost the sole source of information for creating the Job Chart, defining CBT roles and delineating differences between CBT providers and other providers. The focus group sessions also provided a sense of practitioners' interest in CCCBT's initiative to clarify their sector.

## method

Participants working within the CBT sector were invited by CCCBT to attend half-day focus group sessions. See pages 17-20 for a list of focus group participants.

The sessions followed the same format except for the first and last sessions in Edmonton. Participants in Edmonton worked on developing the initial Job Chart structure, and at the last session reviewed a draft of the report and identified selected roles for further delineation.

## Focus Group Session Format

1. Introductions of facilitator and participants.
2. A brief overview of the study: "The Life-Role Development Group has been commissioned by the Canadian Coalition of Community-Based Training to undertake a study of the work performed within the sector. In particular, the Group has been asked to delineate the roles in the sector, the relationships between these roles, and the main functions/duties performed by these roles. Of special interest is discovering any differences between CBT roles and related roles played in for-profit and institutional organizations."
3. Job Chart distributed and validation questions asked:
  - Please review the *functions* of the matrix.
  - Are any missing?
  - Are any there that do not need to be?
  - Are any able to be combined?
  
  - Please review the *skill levels* of the matrix.
  - Are any missing?
  - Are any there that do not need to be?
  - Are any able to be combined?
  
  - Please review the roles listed within the cells of the matrix.
  - Are any missing?
  - Are any there that should not be?

*continued on page 21...*

## focus group participants

Name	Title/Organization	Location
<b>Edmonton – January (Facilitator – Dave Redekopp)</b>		
Donna Anderson	Executive Director On-Site Placement Services	Edmonton, Alberta
Debby Appleby	Program Manager Distinctive Employment Counselling Services Agency	Edmonton, Alberta
Helena Burke	Program Manager On-Site Placement Services	Edmonton, Alberta
Sharon Cameron	Centre Manager YMCA Enterprise Centre YMCA Edmonton	Edmonton, Alberta
Elvin Collins	Executive Director Distinctive Employment Counselling Services Agency	Edmonton, Alberta
<b>Victoria – March (Facilitator – Jerri Vossos)</b>		
Joy Andrews	Employment Counsellor Central Vancouver Island Multicultural Society	Nanaimo
Anna Kanary	Job Development Facilitator Cool Aid Employment Society	Victoria
Anne Levay	Assistant Director/ Employment Counsellor WorkLink	Victoria
Viet Tran	Job Coach Programme Coordinator Victoria Immigrant and Refugee Centre	Victoria
John Wilcox	Coordinator Esquimalt Neighbourhood House Opportunity Centre	Victoria

<b>Name</b>	<b>Title/Organization</b>	<b>Location</b>
<b>Calgary – March (Facilitator – Marnie Robb)</b>		
Alana Huber	Vocational Counsellor HOPE Work Experience Hull Child & Family Services	Calgary
Lorraine Moulding	Manager Women's Trades Centre YWCA	Calgary
Bev Sheckter	Program Manager YWCA	Calgary
Carol Simpson	Employment Services Director Calgary Mennonite Centre for Newcomers	Calgary
Joan Weinberger	Human Resources Director Women in Need Society	Calgary
<b>Ottawa – March (Facilitator – Odette Dupuy)</b>		
Nohad Abomansour	Employment Services Coordinator Carlington Community Health Services	Ottawa
Mary Conroy	Director Youth Services Bureau — Youth Employment Services	Ottawa
Louise Ford	Executive Director Ottawa Deaf Centre	Ottawa
Andrea Genereux	Coordinator of Employment Services Causeway Work Centre	Ottawa
Kunda Mukhedkar	Employment Services Coordinator Pinecrest Queensway Health & Community Services	Ottawa
Anca Sultana	Vanier Community Services Centre	Ottawa

<b>Name</b>	<b>Title/Organization</b>	<b>Location</b>
<b>Montreal – February (Facilitator – Claude Richard)</b>		
Diane Cormier	Executive Director Club de recherche d'emploi Montréal-Centre-ville	Montreal
Serge Fournier	Consultant Association des Clubs de recherche d'emploi du Québec	Montreal
Nicole Galarneau	Executive Director Regroupement québécois des organismes pour le développement de l'employabilité	Montreal
Gérard Henry	Executive Director Programme d'organisation du Travail	Montreal
Lise Paquet	Executive Director Passeport Travail de Beauce	Ville de Saint-Georges
Nicole René	Executive Director Atelier d'artisanat du Centre-ville	Montreal
Jocelyne Vaillant	Executive Director Club de recherche d'emploi du Sud-Ouest de Montréal	Montreal
<b>Moncton – March (Facilitator – Claude Richard)</b>		
Bonnie Black	Counsellor Moncton Employment & Training Services	Moncton, NB
Ann Bunker	Director Carleton-Victoria Community Vocational Board, Inc.	Perth Andover, NB
Roger Cyr	Interim Director Le Centre Horizon	St André, NB
Debbie Dixon	Manager, CVCVB-Plaster Rock	Plaster Rock, NB
Sherla Gallant	Employment Counsellor Canadian Mental Health Association	Summerside, PEI
Charlotte Giberson	Lead Manager, CVCVB	Bath, NB

<b>Name</b>	<b>Title/Organization</b>	<b>Location</b>
<b>Moncton continued...</b>		
Shane Henderson	Director, Oromocto Training & Employment Center Inc. (O.T.E.C)	Oromocto, NB
Randy D. Lindsay	Executive Director C.N.W.A.P. Cobequid Neighbourhood Work Activity Program	Truro, NS
Janice Murphy	Counsellor/Supervisor Key Industries	Saint John, NB
Randy Penney	Director, C-STEP Program John Howard Soc. of NF	St John's, NF
Joan Russell	Manager M.O.R.E Services Inc.	Miramichi, NB
Debbie Vaughan	Divisional Manager Moncton Employment & Training Services	Moncton, NB
<b>Edmonton – April (Facilitator – Dave Redekopp)</b>		
Bernadette Beaupré	Executive Director Ontario Network of Employment Skills Training Projects	Toronto, ON
Elvin Collins	Executive Director, DECSA	Edmonton, AB
Sherolyn Dahmé	Executive Director P.S. Jeunesse Inc.	Valleyfield, QC
Sandra Dobrowolsky	Projects Director ASPECT – B.C.'s Community Based Trainers	Victoria, BC
Michel Doiron	Senior Industrial Consultant Sectoral and Occupational Partnerships Division Human Resources Development Canada	Hull, QC
Joan M. Russell	Vocational Manager M.O.R.E. Services Inc.	Miramichi, NB
Norma Strachan	Executive Director ASPECT – B.C.'s Community Based Trainers	Victoria, BC

4. General discussion about the uniqueness of the CBT sector with the following types of questions as prompts:
  - What makes the CBT sector different from similar work by for-profit service providers or institutional (usually, post-secondary) service providers?
  - If you were to play the role you play now, but for a non-CBT provider, what, if anything would change?
5. Participants picked a function or two that they felt comfortable with and then identified the main duties/tasks of as many roles as they could within the function.
6. Participants thanked and told they would get a final report when completed and approved (likely, in April or May).

The focus group comments were synthesized. An attempt was made to integrate all points of view. However, no roles were removed from the Job Chart even when suggested by participants. This ensured that roles were not removed simply because some organizations did not possess the role.

## results

### Job Functions and Sub-Functions

The Job Chart grew considerably after the first session in Edmonton. Both functions and roles were added, resulting in 19 functions. These 19 functions were grouped into six functions and re-labelled as sub-functions.

#### 1. Program Development

**Program, Services and Training Development (Proactive):** Determining populations to serve, needs of those populations and general programming directions. Determining program outcomes and curriculum/services to reach the outcomes (includes personal development, employability, occupational skill training and academic programming). Acquiring funds to run programs, often through unsolicited proposals.

**Proposal Writing (Reactive):** Responding to requests for proposals. Similar to program development, but done in a reactive manner. Includes the work to complete solicited proposals.

#### 2. Service Delivery

**Program, Services and Training Delivery:** Teaching/facilitating according to program design and revising program design.

**Case Management/Counselling:** Working with clients individually or in groups to assess their needs and ensure they receive the specific services they need either directly or by referral.

**Job Maintenance:** Helping clients keep work through job coaching and job accommodation.

### **3. Marketing**

**Marketing and Placement (Clients):** Finding work for clients and linking clients directly to this work.

**Marketing and Public Relations (Agency):** Enhancing the image of the agency/organization.

### **4. Research and Development**

**Client Follow-Up and Program Evaluation (Quality Assurance):** Checking on client status and progress some time after program completion and assessing program effectiveness.

**Research and Product Development:** Conducting research (e.g., labour market, best practices), and designing, developing and disseminating products (e.g., training curriculum) for use by clients, other agencies or employers.

### **5. Advocacy**

**Advocacy (Agency):** Promoting the value of the organization.

**Advocacy and Awareness (Issue/Client Group):** Acting on behalf of a client group or a common need to educate others (e.g., employers), influence others (e.g., government policy-makers and implementers) and build links between service providers.

**Advocacy (Client):** Acting on behalf of specific clients.

### **6. Operations Management**

**Volunteer Management:** Recruiting, selecting and effectively using volunteers.

**Resource Development (formerly Fund-Raising):** Developing and implementing strategies for generating donations of funds and resources.

**Administration:** Handling the logistics of finances, information and services. Includes record keeping and report writing.

**Human Resources:** Handling recruitment, selection, training and compensation.

**Strategic Planning:** Developing a business plan including vision, mission, and mandate.

**Business Development:** Owning, managing and operating a business to support operations for non-profit organizations (e.g., thrift shop, home renovation contracting).

**Technical Support:** Providing computer/equipment support/service to staff and clients.

### **Skill Levels**

Four skill levels were identified in the Edmonton focus group session, and these remained:

1. **Board:** Unpaid Directors of the organization.
2. **Executive:** Key person or people responsible for the overall operations of the organization, reporting directly to the Board. In small organizations, these roles also serve management and staff functions.
3. **Management:** People who are responsible for leading specific programs and projects within the organization. In small organizations, these roles also serve staff functions.
4. **Staff:** People responsible for direct service delivery or for internal service within the organization.

One focus group session asked to have volunteer added as a skill level, but this was not done because the roles within this new level were no different than the staff roles. It should be noted, however, that some staff roles can be paid or unpaid.

## community-based training Job Chart

- Many role titles are the same; all possible titles are represented on the Job Chart.
- The role of executive staff is largely dependent upon the size of the organization. In large organizations, their primary functions are indicated by italics.

Function	Skill Level/ Sub-Function	Board	Executive	Management	Staff
Program Development	Program, Services & Training Development (Proactive)	None exclusively	Comptroller <i>Coordinator (Co-op)</i> <i>Director of Operations</i> <i>Executive Director</i> <i>Managing Director</i> <i>Vice-President</i>	Coordinator of Client Services Coordinator of Employment Services Manager Program Manager Program Coordinator Program Director	All staff may contribute Consultant Counsellor Employment Counsellor Guidance Counsellor Job Developer Liaison Agent Life Skills Coach Trainer/Facilitator (Clients are involved in this process, too)
	Proposal Writing (Reactive)	None	<i>Comptroller</i> <i>Executive Director</i> <i>Managing Director</i>	Coordinator of Client Services Coordinator of Employment Services Manager Program Coordinator Program Director Program Manager	Admin support staff Bookkeeper Case Managers, etc. Consultant Employment Counsellor
Service Delivery	Program, Services & Training Delivery	Project advisory committee Program evaluation committee	Executive Director Managing Director	Coordinator of Client Services Coordinator of Employment Services Director of Rehabilitation Program Coordinator Program Manager	Business Counsellor Case Manager Employment Counsellor Facilitator Instructor Interpreter/Translator Job Coach Job Developer Life Skills Coach Rehabilitation Counsellor Trainer Vocational Evaluation Consultant

Function	Skill Level/ Sub-Function	Board	Executive	Management	Staff
	Case Management/ Counselling	None exclusively	CEO Executive Director Managing Director	Coordinator of Client Services Coordinator of Employment Services Director of Rehabilitation Program Coordinator Program Manager	Business Counsellor Career Counsellor Career Development & Placement Specialist Case Manager Employment Counsellor Facilitator Guidance Counsellor Instructor Interpreter/Translator Job Developer Outreach Worker Personal Support Counsellor Rehabilitation Counsellor Vocational Evaluation Consultant
	Job Maintenance	None exclusively	None exclusively	Coordinator of Client Services Coordinator of Employment Services Director of Rehabilitation Program Coordinator Program Director	Accommodation Consultant Case Manager Computer Accessibility Specialist Employment Counsellor Ergonomics Specialist Interpreter Job Coach Job Developer Literacy Instructor Placement Manager Rehabilitation Counsellor Sign Language Teacher Vocational Evaluation Consultant Vocational Trainer
Marketing	Marketing & Placement (Clients)	None exclusively		Coordinator of Employment Services Marketing & Administration Coordinator Program Coordinator Program Director Program Manager	Case Manager Counsellor Employer Contact Employment Counsellor Employer Liaison Interpreter Job Coach Job Developer Job Marketer Placement Manager Rehabilitation Counsellor Sign Language Teacher

Function	Skill Level/ Sub-Function	Board	Executive	Management	Staff
	Marketing & Public Relations (Agency)	Board Committee	CEO Executive Director Managing Director	Coordinator of Employment Services Program Coordinator Program Director Program Manager Public Relations Coordinator	All (indirectly) Desktop Publisher Video Producer Web Page Developer
Research & Development	Client Follow-Up and Program Evaluation (Quality Assurance)	Program evaluation committee	CEO Executive Director		
	Research & Product Development	Advisory committee	Executive Director Managing Director	Coordinator of Client Services Director of Rehabilitation Director of Research Manager Program Manager Program Coordinator	Administrative Assistant Career Counsellor Case Manager Clients Desktop Publisher Employment Counsellor Facilitator Instructor Interpreter Office Administrator Researcher Translator Video Producer Vocational Evaluation Consultant Web Site Developer Writer
Advocacy	Advocacy (Agency)	Chair Specific board members (ad hoc)	CEO Executive Director Managing Director	Program Coordinator Program Director Program Manager	Employment Counsellors All other roles contribute, but none exclusively
	Advocacy & Awareness (Issue/Client Group)	All	All	All	All
	Advocacy (Client)	None	None	Coordinator of Client Services Director of Rehabilitation Marketing & Administration Coordinator Program Coordinator Program Director Program Manager	Business Counsellor Career Counsellor Case Manager Employment Counsellor Instructor Outreach Worker

Function	Skill Level/ Sub-Function	Board	Executive	Management	Staff
Operations Management	Volunteer Management	None exclusively, but all need to be involved	Executive Director Managing Director	Coordinator of Employment Services Human Resource Coordinator Program Director Volunteer Coordinator	Business Counsellor Career Counsellor Employment Counsellor Instructor Volunteers
	Resource Development (formerly Fund-raising)	Director of Finance Treasurer All board members contribute	<i>Comptroller</i> <i>CEO</i> <i>Executive Director</i> <i>Managing Director</i> <i>Resource Developer</i> <i>Vice-President</i>	Finance Manager Fundraising Coordinator Manager Program Coordinator	Database Administrator Data Entry Clerk Desktop Publisher Volunteers Web Page Developer
	Administration	Treasurer All Board members need to be involved	CEO Comptroller Executive Director Managing Director Vice-President	Assistant Coordinator Coordinator of Client Services Director of Rehabilitation Finance Manager/Officer Manager Marketing & Administration Coordinator Program Director Program Manager	Assistant Accountant Assistant Administrator Bookkeeper Client Info Clerk Data Entry Clerk Office Manager Payroll Administrator Receptionist Senior Accountant
	Human Resources	Human resources committee	<i>CEO</i> <i>Executive Director</i> <i>Managing Director</i>	Assistant Administrator Coordinator of Client Services Manager Program Coordinator Program Director Program Manager Training Coordinator	All may contribute in part
	Strategic Planning	Board Committee	<i>CEO</i> <i>Executive Director</i> <i>Managing Director</i>	Program Coordinator Program Director Program Manager	All roles contribute but none exclusively
	Business Development	Board Committee	<i>CEO</i> <i>Executive Director</i> <i>Managing Director</i> <i>Comptroller</i>	Business Manager Program Coordinator Program Director	Business staff Volunteers
	Technical Support	None exclusively (some regarding policy issues)	Executive Director Managing Director	Coordinator of Client Services Manager Program Coordinator Program Director Program Manager	Client Computer Support Technician Computer Instructor Computer Support Technician Network Administrator

## Descriptions of Key Roles in the CBT Sector

The CCCBT's National Steering Committee for HR Study chose the key roles from the Job Chart. These roles were considered the most representative of the CBT sector.

### Board Level

Although specific functions are the responsibility of designated Board members, it became clear within this study that all Board members share a host of functions. It also became apparent that Board members may be uncertain about their roles and/or may not perform the roles to the levels required in all cases.

**Note:** The functions of the entire Board are listed here. No single Board member performs all these functions; an effective Board would designate specific functions to individuals or sub-committees.

The Board is responsible for these functions:

- advocacy
- resource development
- strategic planning
- developing policies re: volunteers
- ensuring fiscal responsibility of the agency
  - reviewing and approving budget
  - setting accountability guidelines
  - monitoring income and expenditures
- developing networks or relationships with public
- developing policies and procedures for strategy and administration of agency and/or reviewing and approving strategy, policies and procedures
- recruiting and hiring Executive Director or Chief Executive Officer.

**Note:** These functions are the responsibility of a Policy Board. An Operational Board may also be responsible for marketing/public relations, program evaluation, identifying client issues and informing others about the agency and client issues.

### Executive Level

#### *Executive Director*

Executive Directors within many CBT organizations combine executive, management and often staff functions. Here are the most key functions of an Executive Director.

#### *Develop programs/services*

- design needs analysis processes
- design programs and services to meet client needs
- ensure proposed programs meet needs of issues
- liaise with government agencies/funding sources
- keep abreast of research in field/academics/theories
- write proposals for programs/services
- develop funding sources for unsolicited proposals

#### *Respond to opportunities*

- liaise with government agencies/funding sources
- research opportunities for funding, resources and programs
- ensure opportunities meet mission of agency
- ensure opportunities are financially feasible
- ensure programs meet needs of issues
- write proposals

#### *Oversee program and services delivery*

- ensure policies and procedures are implemented and followed
- meet staff/management regularly to review client needs and programs/resources/funding needed
- act as lead for team initiatives
- support Area Managers

#### *Lead marketing and public relations activities*

- develop network
- engage in public relations with government policy-makers and implementers
- engage in public relations with public or individuals
- develop community awareness
- increase Board awareness

#### *Lead evaluation and quality assurance initiatives*

- create quality control and assurance systems
- monitor to ensure mandate is followed in how clients needs are reviewed and met
- develop program/service evaluation systems or ensure they are developed
- synthesize evaluation information

#### *Advocate for issues and the agency*

- liaise with government agencies/funding sources
- make presentations to government officials and community representatives
- influence decision-makers via meetings and conversations

#### *Manage human resources*

- approve hiring
- handle employee discipline
- ensure in-service training for staff
- create an atmosphere of growth/change/reflexivity in the organization
- establish grievance procedures
- be involved in grievance processes

#### *Lead resource development/fund-raising*

- ensure effective resource/fund-raising
- design fund-raising implementation strategy
- select key staff at the management level to implement fund-raising activities
- write proposals

- plan/schedule fund-raising events (in large organizations, this will be done by a fund-raiser)
- negotiate contracts/agreements

*Lead research and development initiatives*

- develop research and development ideas
- seek funds/resources for R&D
- designate personnel for R&D initiatives
- oversee R&D projects

*Lead administrative activities*

- develop policies and procedures for Board approval
- develop budget
- account for all expenditures
- report income/expenditures
- inform Board of Directors of direction/growth sources

*Conduct strategic planning and business development activities*

- provide oversight regarding mission and mandate
- provide a vision for the organization
- provide leadership/clarify organization's goals
- clarify values for the organization.

## **Management Level**

*Program Manager/Director/Coordinator*

Program Managers, Directors and Coordinators are grouped together because their titles are occasionally synonymous and even when their titles signify real differences, the differences are usually in terms of levels of responsibility. They perform many of the same functions as Executive Directors, but with a greater degree of specificity.

*Develop programs/services*

- conduct need analyses
- contribute to the design of programs and services to meet client needs
- liaise with government agencies/funding sources
- keep abreast of research in field/academics/theories
- write proposals for programs/services
- assist in developing funding sources for unsolicited proposals

*Respond to opportunities*

- liaise with government agencies/funding sources
- research opportunities
- ensure opportunities meet mission of agency
- ensure opportunities are financially feasible
- ensure programs meet needs of issues
- write proposals

#### *Manage program and services delivery*

- ensure policies and procedures are implemented and followed
- meet staff regularly to review client needs and programs/resources/funding necessary
- help staff trouble-shoot problems
- develop partnerships with other agencies (profit, non-profit and institutions)

#### *Engage in marketing and public relations activities*

- develop network
- engage in public relations with government policy-makers and implementers
- engage in public relations with public or individuals
- develop community awareness

#### *Manage evaluation and quality assurance initiatives*

- monitor programs/services to ensure mandate is followed in how clients needs are reviewed and met
- design instruments/questionnaires for data collection and information gathering
- get direct input from clients on their needs
- gather feedback from staff and clients on effectiveness of programs
- collect/analyze evaluation data
- summarize evaluation data

#### *Advocate for clients*

- speak on behalf of clients
- liaise with other agencies or employers

#### *Advocate for issues and the agency*

- liaise with government agencies/funding sources
- make presentations to government officials and community representatives
- influence decision-makers via meetings and conversations

#### *Manage human resources*

- determine human resource needs/criteria for initiatives
- establish recruitment and selection processes for staff and volunteers
- select staff/volunteers
- handle employee discipline
- provide on-the-job and in-service training for staff
- provide feedback to staff
- coach staff
- be involved in grievance processes

#### *Participate in resource development/fund-raising*

- develop presentations
- present initiatives/agency to potential funders
- write proposals
- manage fund-raising events

*Participate in research and development initiatives*

- manage R&D projects
- report progress to Executive Director/funders

*Manage administrative activities*

- develop project budgets
- account for all expenditures
- ensure invoicing is completed
- report income/expenditures to Executive Director

*Participate in strategic planning and business development activities*

- contribute to mission and mandate
- communicate the organization's vision and values to staff
- align project goals with organization's goals.

*Coordinator of Employment Services and Coordinator of Client Services*

The Coordinator of Employment Services and the Coordinator of Client Services perform the same functions as the Program Manager/Director/Coordinator, but in a more limited and focussed way. Their areas of focus are on specific services and programs, and they play a more “hands-on” role than Managers in terms of attending to both staff and client needs and issues.

Coordinators of Employment Services add to their tasks a direct relationship with employers — contacting them, meeting with them, encouraging them to provide opportunities for clients and trouble-shooting when there are problems. Both types of Coordinators play a less direct role than Managers in program development, proposal writing and resource development.

*Public Relations Coordinator*

The Public Relations Coordinator exists only in larger CBT organizations.

- design public relations strategies
- develop communications plans
- liaise with all stakeholders
- design public relations events
- design public relations products (e.g., brochures)
- manage public relations activities
- engage in public relations activities
  - present to funders, employers, community groups.

**Staff Level**

*Career Development and Placement Specialist/Case Manager/Employment Counsellor*

- assess client needs
- provide career counselling (individually and group)
- provide training/instruction (e.g., life skills, work search skills)
- refer clients internally and externally

- assist clients with work search activities (e.g., resume writing)
- bring together all significant people with client to plan for successful job placement
- identify needed assistance (e.g., transportation, special clothing, lunch money, specialised training)
- assign responsibility for meeting the needs for assistance
- follow up with client at regular intervals
- maintain client file/documentation
- develop employer contacts
- advocate for clients with employers.

*Employer Liaison/Liaison Agent/Placement Manager/Job Developer*

- develop working relationships with employers
- help employers determine needs
- develop employer awareness of client group
- market the agency and client
- convince employers of the benefits of hiring clients
- ensure appropriate clients are placed with employers
- ensure clients receive necessary work-specific training
- arrange interview
- introduce client and trainer to employer
- trouble-shoot problems with employer and/or Case Manager and Job Developer
- collect follow-up data.

**Note:** Job Developers add a unique function — helping employers create work positions.

*Facilitator/Instructor/Trainer/Life Skills Coach*

- prepare delivery of sessions
- prepare materials needed
- design assessments of learning outcomes
- facilitate group sessions
- monitor individuals
- refine/adjust existing program to improve impact
- determine best *next* steps for clients
- provide one-to-one assistance
- refer for in-depth assistance
- assess individual progress
- document progress
- keep Coordinator/Manager informed regarding client progress
- advocate for clients
- get feedback from clients, employers about suggestions for change/filling gaps
- inform management of needs detected
- network with other front-line staff
- develop new tools/techniques.

### *Job Coach*

- help client to develop skills in line with company needs/expectations
- monitor work performance of client
- be aware of/make recommendation about other factors outside of job that affect job performance
- provide one-to-one training to client
- be aware of client's job responsibilities from employer in community placements
- teach client how to perform job responsibilities
- form relationship among client/other staff/employees
- ensure/teach client to present themselves in positive manner
- ensure client can/knows how to get to employment location, provide bus training if needed
- ensure client knows/introduced to co-workers, oriented to work environment
- keep documentation of client growth/performance
- determine fade-out process
- monitor performance
- ensure not only physical but also social interaction is appropriate
- counsel/educate client and employer
- trouble-shoot any problems
- ensure quality is acceptable, production and work pace is up to par before fading out of sight
- once fade-out is implemented, monitor to ensure the success of the placement
- advocate for the client.

### *Outreach Worker*

- collaborate with Case Manager and Facilitator to debrief relevant information
- provide emotional, physical, mental, social and spiritual intervention with follow-up support (e.g., mental health, addiction, legal support, crisis intervention)
- assist clients to improve/reinforce overall problem-solving skills and communication skill transference from a counselling/class setting to real-life situations
- encourage experiential learning to enhance education and job placement success
- assist in the development of confidence, self-esteem and motivational skills
- assess and reassess action plan with client
- network with community to provide liaison and brokerage services for clients
- case conference with Case Managers to update client action plan and progress
- provide regular documentation to Case Managers.

### Similarities and Differences Between CBT and Other Providers

Because the work in this study on roles and functions might not clearly delineate the differences between CBT and other providers, the study gathered perceptions of their sector from focus group participants.

Participants focussed primarily on the differences between CBT providers and private sector organizations and institutional (primarily, post-secondary institutions) providers, noting that:

- as funding criteria change throughout the country, the distinctions between CBT providers and other providers are rapidly becoming reduced. Funding is increasingly becoming outcome-driven, forcing all providers to plan and operate in a more similar way than in the past;
- many participants have operated within the CBT sector for a long time and may not have a clear sense of the workings and motivations of related providers. Private sector and institutional providers were not able to *defend themselves* in this study; the results only identify the CBT view of the CBT sector.

**Note:** This section reports differences as perceived by individuals working in the CBT sector. Other than the focus group facilitators who remained neutral, no institutional or private-sector providers participated in these sessions to give their point of view. The following is a one-sided story. It is probably also a slightly idealized story, in that it represents the *best* of CBT practice. This idealization is not problematic for this study — clarifying the role of the CBT sector requires an examination of what it can be at its best.

### Summary of Major Themes

Numerous ideas emerged regarding the similarities and differences between CBT and other providers. These ideas are presented in full in Appendix A.

#### Who they serve

**Marginalized clientele** – CBTs are more likely than private providers or institutions to focus their efforts on marginalized clients. The movement to outcome-driven funding from service-driven funding results in organizations being paid by the successes they achieve rather than by the amount of services they deliver. Consequently, participants reported that non-CBT providers had a greater tendency to select clients who were likely to be successful and refer to other agencies those whose success was in question. CBT providers felt that they accepted clients on the basis of need, not likelihood of success.

**The community** – CBTs serve the community and families, as well as individual clients, doing so from a *ground-up* approach. Private providers and institutions tend to serve individual clients. Participants felt that most CBTs were driven by local, collective needs that were determined by input from the community itself. They perceived private providers to be individual, rather than community,

service providers because funding is tied to individual success. In other words, private providers accrue no financial gain in serving community needs and therefore there is little motivation to meet these needs.

Institutional providers may have more incentive to serve the community than private providers, but their infrastructure and systems were designed to serve *students* (in this case, individual clients), not communities. They tend to focus on individual services as well.

With respect to community input, both private and institutional providers are more likely to respond to requests for services (i.e., calls for proposals or terms of reference) than to actively seek out the needs of the community. Another agency (almost always a government department) may or may not have sought input from the community to generate the request for services, but the private and institutional providers operate from the assumption that these needs have already been accurately determined.

#### **How they serve**

**Holistically** – CBTs attempt to be *client servers* whereas private providers and institutions tend to be *service providers* — whether or not the clients need the service or need more than simply the service. CBT providers felt that they exercised a great deal of latitude in determining client need and fulfilling these needs, regardless of whether or not the need fit within the *program* being offered.

They perceived private and institutional providers to be more focussed on providing services, and that they would provide these services regardless of what clients really needed. An implication for CBT staff is that they feel they have more control over their work than other providers.

**Flexibly** – CBTs are better able to quickly respond to changing community needs than institutions or private providers. Participants felt that because they are more focussed on community need and client need rather than simply providing a set service, they anticipate changes in need more effectively and are more capable of changing services to meet these needs than other providers.

**Preventatively** – CBTs have as much interest in preventing client issues as in helping resolve them. In the view of participants, institutions and private providers rely on problems to remain in operation. CBTs have a much greater stake in an advocacy role, serving the community as a whole by preventing problems as much as possible.

**Cost-effectively** – CBTs feel they devote more funding to providing service and less to overhead (marketing, equipment, administration) than private or institutional providers. Participants claimed that about 90% of their funding went directly to service. Although participants did not know the percentage for other providers, an industry norm is between 50% and 70%.

**When they serve**

*Long-term* – CBTs tend to serve clients for the long-term, regardless of program start and end dates. This has implications for staff who feel more security because service is not simply project-based. Participants saw institutions and private providers tending to stop serving when a program is over and short-term outcomes have been met.

**Why they serve**

*Client/community well-being* – CBTs' primary motivation is the well-being of clients and communities. Their aim is to become obsolete. Institutions and private providers tend to have profit or *return to working capital* as a motive and are less interested in becoming obsolete, according to participants.

**Where they serve**

*Where the clients are* – CBTs try to locate themselves as close to clients as possible. Institutions and private providers tend to locate in areas of convenience (usually, centrally). In this manner, non-CBT providers can easily change the population they serve when funding for a particular client group runs out. CBTs, on the other hand, exist to serve the client group.

*Within a community network* – CBTs operate within a community network. They involve clients, other service providers, government and community groups in their planning and operations. Private and institutional providers were seen to operate in a more isolated way.

**Note:** The Group was asked to assess the level of *buy-in* of this initiative by participants. All focus group facilitators reported high levels of interest among participants — individuals within the CBT sector seem genuinely interested in clarifying the nature of their sector. In general, they appeared quite proud of their work and have a strong desire to be able to keep doing this work in an effective manner.

This study generated some surprising results that changed some of the study's expectations. In particular, the lack of findings within the literature search resulted in the Group's inability to:

- analyze other countries' approaches to delineating the CBT sector,
- provide alternative approaches to delineating the CBT sector, and
- identify roles played and functions served in other countries that may not currently be played in Canada.

The study changed from *building on existing work* to *starting from scratch*. Other countries have paid little or no attention to differentiating the CBT sector from other providers.

Also, labour market systems such as Canada's *National Occupational Classification* or the United States' *Dictionary of Occupational Titles* provide only overall distinctions that serve little use for a study such as this one. For example, all types of *educators* are lumped together under one term, and many other helpers become grouped under labels such as *counsellors*, *psychologists* or *social workers*.

The closest work done within this area was:

- an informal, unpublished matrix of the career development sector by Concordia College in the late 1980s, and
- a study of career pathways for entry level workers who work with developmentally delayed clients.

This study sets a precedent. It appears to be the first study to:

- delineate the functions and skill levels of the CBT sector,
- identify the roles within the CBT sector, and
- detail the main tasks of the roles within the CBT sector.

It may also be the first study to create a framework for the relationship between roles within the *adult employability* sector, regardless of whether the provider is community-based, private or institutional.

No significant work has been done on classifying roles within the CBT sector. Also, work that has been done on other sectors is far too general to be useful to CBT providers.

### Recommendation 1

The Canadian Coalition of Community-Based Training will benefit from continuing to refine the Job Chart. This will require broad validation within the CBT community to ensure support for the model.

Appendix B contains a questionnaire that can be used to validate the Job Chart. Appendix C shows the results of this questionnaire distributed to 88 participants in August and September 2000.

## summary profiles of core CBT roles

This study was intended to result in summary profiles of the tasks and competencies of core CBT roles. Given the overlapping nature of many of these roles, and the different titles for these roles used in various areas of Canada, it was not worthwhile to create full descriptions for these roles.

It was more beneficial to review the functions (e.g., advocacy, case management/counselling) performed within the CBT sector and develop competency profiles for the functional areas. This was done because:

- a focus on function by-passes job nomenclature problems between agencies and regions;
- a functional analysis may be more adaptable to change than a job analysis approach;
- an examination of function may make it easier to *borrow* competency descriptions from other sectors, in particular, the career development sector;
- a methodology for a functional analysis exists in highly transparent form within the Canadian Career Development Guidelines and Standards (CCDGS) project;
- there is considerable overlap between the work of the Canadian Career Development Guidelines and Standards project and the work likely needed by the CBT sector. Further CBT work could focus on the missing elements within the CCDGS project, in particular, the CCDGS project is not addressing *indirect* functions such as, marketing, and volunteer management that are pivotal to the CBT sector.

In defending their approach to a functional analysis, the CCDGS project claimed the approach "...accounts for the activities that professionals perform and is therefore easily understood by both practitioners and clients...recognizes that people acquire proficiency from many sources and ultimately, it is more important to address what people can do, rather than how they learned to do it...lends itself readily to prior learning assessment and recognition...."<sup>2</sup>

**Note:** Although the literature review for this study was not intended to investigate the host of available approaches to competency analysis, the author is sufficiently familiar with a variety of them to make the above suggestions with some confidence. Approaches that have worked with other sectors such as, role analysis (the most thorough example is likely the Alberta Tourism Education Council's role descriptions of the tourism industry) may not work as well in a sector in which:

- role descriptions are radically altered by the size of the organization (e.g. individuals who perform *pure* Executive Director roles are found only in large organizations);
- staff are expected to meet the needs of clients, even when this occasionally means working outside of one's job description; and
- the uniqueness of the sector is partially defined by some of its functions (see Common and Unique Characteristics of CBT on page 40)

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<sup>2</sup> ATEC (1999). Canadian standards and guidelines for career development, Draft 1. Ottawa: CCCBT, Career Development Guidelines and Standards, p. vi.

## Recommendation 2

Further delineation of tasks and competencies should follow a functional rather than occupation-specific analysis.

The work of the Career Development Guidelines and Standards project can provide a process and some content for doing this. The CBT sector may contribute to the Guidelines and Standards by analysing indirect functions (see Recommendations 3-6).

## common and unique characteristics of the CBT sector

One purpose of this study was to determine the common and unique characteristics of the CBT sector as compared to related sectors. A review of the Job Chart shows that most functions are shared by other employability facilitators, career development providers, literacy educators and other educational/counselling providers.

What may make the CBT sector unique, at least in employment/work preparation, are its:

- advocacy and awareness sub-function;
- volunteer management sub-function;
- resource development sub-function, and
- active use of a Board skill level.

### Definitions

**Advocacy and Awareness (Issue/Client Group):** Acting on behalf of a client group or having a common need to educate others (e.g., employers), influence others (e.g., government policy-makers and implementers) and build links between service providers.

**Volunteer Management:** Recruiting, selecting and effectively using volunteers.

**Resource Development (formerly Fund-raising):** Developing and implementing strategies for generating donations of funds and resources.

**Board:** Unpaid Directors of the organization.

Private providers typically do not use these functions. Institutional providers are more likely to use these functions, but in a much broader context. For example, a post-secondary institution is governed by a Board, but the Board is usually quite removed from decisions about the program operations related to employment/work readiness. The institution will likely have a resource development function, but this function typically serves the entire institution rather than just the

employment/work readiness area. Volunteers may also be used, but not to the extent in which they may be within the CBT sector. Similarly, a post-secondary institution may advocate for a client, but not usually to the extent that a CBT organization would.

**Recommendation 3**

Focus on Board development and involvement. An effective Board can be an enormous asset. However, Board members are often not well selected nor do they have the competence required to be effective.

**Recommendation 4**

Focus on developing resources and the competencies associated with them. CBT providers will be in a tenuous position financially and morally if they attempt to operate with funds available to other providers.

**Recommendation 5**

Focus on volunteer management and the competencies/systems associated with it. Volunteers are an asset other providers rarely possess.

**Recommendation 6**

Focus on advocacy and awareness and the competencies associated with them. This may be the most defining feature of the CBT sector.

Note: these four functions are all primarily “indirect” — they do not involve the front-line provision of service directly to the beneficiary of the function. It is in these indirect functions that the CBT sector finds its uniqueness, and they occur predominantly at the executive and management levels. It is these types of functions that set the tone of an organization, and the tone of the organization determines the way front-line service providers interact with clients.

**Recommendation 7**

Develop/refine a preferred future or vision for the CBT sector and actively move toward it, especially from a human resources perspective.

## next steps

Two parallel streams of activity can follow this study. One stream can continue the work in this study through broad validation and more detailed definitions of roles or functions. Another stream can set direction for the CBT sector so that it moves forward in a proactive manner.

### Stream One: Steps Required for More Detailed Definitions

1. **Validate Job Chart.** Using a questionnaire, the Job Chart in this study should be validated with as many CBT providers as possible. This will ensure the accuracy of the chart, determine the level of interest in the process, and increase the level of *buy-in*. The results of a questionnaire would provide validated documentation of the CBT sector in a way that highlights the functionality of the sector and the relationships between roles within the sector.
2. **Select functions on which to focus.** The CCCBT will make this decision based on what other work is already being completed and what is core to CBT.
3. **Delineate functions in terms of tasks and competencies.** The selected functions should be broken into tasks and competencies identified to perform them. The CCDGS project created a thorough and inclusive process for doing this. This process should be fully transferable to the CBT sector.
4. **Develop standards and training/learning options.** This stream would ultimately see the development of performance standards and measurements and identify training and learning options for all CBT functions.

### Stream Two: Defining a Preferred Future for the CBT Sector

This study presupposed that a definable sector with some unique attributes existed, and that these attributes and the sector's roles/functions could be identified. What emerged from the focus groups was a sense that the many changes affecting the sector in recent years have resulted in a sector that is less certain of itself and its uniqueness, and uncertain about what it may look like in coming years.

Because of the participants' uncertainty about their sector, the Group recommends that CCCBT work on developing a *bigger picture* rather than just refining functions/competencies as outlined in Stream One.

The "bigger picture" means determining a preferred future for the sector, discussing scenarios that may positively or negatively influence the sector's ability to move toward its preferred future, and setting goals to begin actively moving toward the preferred future.

1. **Determine a preferred future for the CBT sector.** Participants in the focus groups seemed to look to the past more than to the future in defining what their roles are and what the sector is. In times of change, this view could lead the sector to simply react to change rather than anticipate and prepare for change. The sector should examine itself in terms of where it *wants* to be and what it *wants* to look like, and then deal with change with these *wants* in mind. The CCCBT could begin this process by meeting to discuss such questions as:
  - In the best of all worlds, what activities would our sector be engaged in 20-30 years from now?
  - In the best of all worlds, what clientele would our sector have 20-30 years from now?
  - In the best of all worlds, how would our sector be operating 20-30 years from now?
  - What values drive us now and do we wish to continue to drive us in the future?
  
2. **Discuss scenarios that may affect the CBT sector.** Change will continue to influence the work of the CBT sector. Although changes cannot be predicted, the CBT sector can prepare for change by discussing possible negative, positive and status quo scenarios. This will require an analysis of trends (e.g., economic, social, educational, technological and organizational) affecting the sector and the creation of possible scenarios resulting from these trends. Some example scenarios, and sample responses to these scenarios, include:

**Scenario 1: Governments keep moving in the same direction — to outcome-based contracted services.**

- CBTs will become increasingly similar to other providers unless they proactively find other funding sources or clearly demonstrate added value.
- CBTs may be able to better generate excess revenue (return to working capital) from projects, which it could devote to proactive initiatives.

**Scenario 2: Governments move away from contracting front-line services and expect individual consumers and/or municipalities to pay for career-related services.**

- CBTs' moral obligations to their client base will rise considerably; other sources of funding will be essential.
- CBTs will play a large role in defining client/community need.

**Scenario 3: Governments find that outcome-based funding is not working and desire a more holistic approach.**

- CBTs will be well positioned to respond but only if accountability measures (e.g., composite self-sufficiency index) are in place.

These scenarios give examples of the issues that the CBT sector may need to be prepared for. Discussion of scenarios and responses to them, starting with the

CCCBT and spreading through the CBT community, will make it much more likely that the CBT sector will be ready to control its own destiny regardless of the direction of change.

3. **Set goals for the sector.** Using the preferred future for direction-setting, the CBT sector could create mid-term (5-10 year) goals for itself. Each of these mid-term goals would be broken down into short-term goals, *with a potentially different set of short-term goals for each scenario*. Short-term goals would be selected from the possible range of goals, and the sector could begin pursuing these goals without further reference to the mid-term goals. Once the short-term goals are known, the mid-term goals should be ignored as they are necessary only to establish short-term goals.

**Note:** These goals may or may not have anything to do with further defining the functions and competencies of the sector. In other words, Stream One may become irrelevant as Stream Two proceeds.

Engaging in Stream Two activities will enable the CBT sector to better anticipate change and move in desirable ways within that change. Doing so will also likely provide greater clarity to Stream One tasks, allowing the sector to clarify what its important functions are and on which ones it wishes to build.

# appendix A

## raw data: perceived differences/similarities between CBT and other providers

### Edmonton

There was very little time in the initial Edmonton session to address perceived similarities and differences. The key characteristics of CBT that emerged in a very brief discussion were:

- holistic approach;
- seamlessness of delivery;
- devoting funds to front-line delivery rather than overhead.

### Victoria

#### *Place*

Small organizations flexible to meet funder's needs in a more responsive way.

Environments are welcoming, friendly, intimate.

Accessible (storefront — generally located where clients can easily access using public transit).

#### *Personnel*

Fewer staff.

Mostly non-unionized.

Organizational structure is much flatter.

Staff feel they have more freedom or control over their work

Staff have more power within organization.

#### *Programs*

Target groups are different — they take people where they are “at” and help to move them where they want to “go”.

Services are free for clients.

Specialize in clients with barriers to employment (language, addictions, attitudinal, behavioural).

Assist people who have left other systems, who don't fit into other's programs or who others don't want to work with. **They serve clients who don't fit the norms.**

Short-term programs that are holistic. Passionate about whole person.

#### *Power*

Feel POWERless politically.

Feel they have more ability to “emPOWER” clients.

Staff have more power within organization.

#### *Philosophy*

Community-based so local needs are met because they are a local organization.

Work in partnerships with other community service providers.

Grow from ground up - grass roots organizations set up to fill a local need.

Community development model rather than economic development model.

In general, these organizations characterised themselves as creative, responsive, adaptable, and reactive.

## Calgary

This was a difficult question for participants to answer. They had no clear answers. Discussion centred around the following points:

- There is little clear distinction between profit/non-profit. It seems to be a matter of degree or emphasis. The gap between the two is closing in many instances: non-profit organizations are having to become increasingly self-sustaining and for-profit organizations are having to become more community-oriented.
- The difference between profit/non-profit service providers is in the vision/mission statement and how that statement impacts one's work.
- Non-profit organizations will tend to have more emphasis on the community as a whole and on improving society. They will be more likely to work in partnership with the community.
- For-profit organizations may have more emphasis on making a profit margin. This does not mean that they are, therefore, unethical and that they do not provide good services. It does mean that the profit component may enter more into decision-making processes and practices, such as whether or not to offer certain services and how those services will be offered.
- In non-profit organizations, the consumer comes to the organization to access its service. In profit organizations, the organization tries to market to the consumer. Further discussion indicated that this may be a matter of degree, as both profit and non-profit may try to identify a niche need.
- Related to the last point is that non-profit organizations are less likely to compete against other organizations for work. Again, this is a matter of degree, with profit organizations seen as being more aggressive in identifying a niche need and/or offering a service.
- The discussion between profit/non-profit organizations depends on how community-based training is defined. If the focus is employment/employment readiness, the field is similar to the career development/employment field. There may be less difference between profit/non-profit organizations than if looking at for-profit organizations such as large oil companies.

## Moncton

- We don't charge employers — unlike for-profit agencies.
- Highly knowledgeable of our clients' reality and needs — may not be the case with public institutions.
- Our capacity to individualize our services in order to meet clients' specific needs as opposed to institutions need to reach broad audience.
- Our ability to follow-through on our clients' long-term needs.
- Our programs are developed to fit client needs, not other way around (clients having to fit institution's curriculum).
- Our approach tends to be more holistic or global (community and family involvement).
- Our ability to continue to follow up after clients are no longer receiving direct services (e.g. when probation ends).
- Advocacy role.
- Social conscience — our decisions are made for benefit of clients and community — not for increasing profitability.
- Our focus is not on profitability.
- Our reliance on and contribution to the volunteer sector.
- More credibility in the eyes of the client.
- Often we have to provide better services than for-profits and institutions, to justify on-going funding.
- Administrative mindset — focus on breaking even and not profit.
- Accountability — our short and long-term goals are reviewed by ourselves, the clients and funders.
- CBTs are rooted in community and able to navigate/access community services more quickly (integral part of community network).
- Part of large community network.
- Holistic.
- We work with families, employers and community that surrounds client.
- Will go the extra mile to meet specific or special needs of clients.
- CBTs are not focused on delivery of "our" services, but on client needs and desired goals.
- More grass-rooted — client needs are identified from interaction with clients and community.
- The notion of long-term for CBTs is much longer (not unusual to have re-visits from clients years after having first accessed our services).
- We typically have community-based board — quality of service monitored on-going basis. Also connection with community.
- Will draw on volunteers infrastructure if funding is insufficient.

## Montreal

- Our ability to provide follow-up support and for a longer period of time.
- Because we depend on funding, availability of our services can only be relied upon on a yearly basis.
- We do not have profitability as an end goal.
- Parameters we are subjected to: percent of client types.
- Perceived by funders as service providers or extension of their services and not as an enterprise; therefore sometimes difficult to have our *business* needs recognised.
- Our flexibility and autonomy when it comes to responding to client needs (development and services delivery).
- We are always there (provided that funding is not cut).
- Our approach tends to be one of counselling rather than educational. A counselling approach more appropriate to respond to client needs.
- CBTs are client focused, not service delivery focused.
- We cater to the needs of those who often have fallen through the cracks or have been marginalized by the system and its institutions — we are experts in the field of the marginalized.
- CBTs have less freedom when it comes to internal administration and management. Often paralyzed by necessity to fill-out government forms (paperwork) — because our funders are mostly government agencies and they tend to consider us as an extension of the services. Because we must answer to the funders, we are limited in the ways we can manage our agencies.
- Institutions tend to have an educational approach, are focused on delivery of services, are an extension of a government function, and base their effectiveness on short-term, quantifiable results. CBTs on the other hand have a counselling approach, are focused on client needs and are vision-based, therefore have a much longer-term scope.
- Institutional outcomes: professional designation or diploma.
- CBT outcomes: self-sufficiency, autonomy, wellness, and a more healthy and productive community.
- However, we recognize that wellness issues are becoming more of an institutional priority as well.
- CBTs often have to critique government and institutional policies and programs on behalf of our clients and communities. We also serve as what works or best practices when it relates to serving clients.

## Ottawa

### Question 1: What is the uniqueness? CBT...

- responds to community needs
- is flexible to client needs
- has the ability to tailor programs to needs of employer/employee
- fosters a caring environment for adults entering learning environment after a long time
- has a different atmosphere.

### CBT more able to adjust for client needs:

- ability to respond faster, comes with flexibility, adjust fast.
- less reluctance to refer on.
- more concern for client, spend more time fund-raising.
- more inclusive and more easily accessed to disabled and disadvantaged populations.
- services *less time-limited*.
- more community awareness, public education.
- advocacy comes with public education.
- CBTs will generally work with harder to serve populations.
- accountable to bottom line, *but* don't have to make a profit for someone else.
- different philosophy re: approach to client.
- treat clients as people, whereas other sector mainstreams, creams, treats clients as business.
- inclusivity.
- try to adjust to client's needs, will do even what's not in your mandate.
- despite demands of functions, go out of way to help client; won't find that in business; even with constraints, pressures, focus is client-oriented, because of context of where we work, our philosophy.
- for profit, we simply *react* because that philosophy for profit simply doesn't exist.
- accountable to public and *more* accountable to our clients (possible).
- develop partnerships with other agencies to ensure delivery to clients we see a need for.
- add whole multi-level community-level management system we have for program delivery.
- way we use our Board of Directors, volunteers, function with their agencies.
- concerned re: helping people move through system, not just consumers.
- system of student placement, people for training, take in volunteers to gain experience.
- way we treat our employees — *very well* — more security of positions, more than private sector where not always well-paid and first place to cut.
- importance of evaluations and accountability to our consumers.
- importance placed on community consultations, involving community in anything we do, e.g., program development.
- concerns for bringing in community, supports for individual client — holistic.
- way we work as a network/community.
- someone will take care of this person from start to finish.
- complementary services.

- In profit sector, invest a lot of time for promotion/advertising; they do that well. Good equipment, polished look to their materials/curriculum.
- Many of us on *shoestring* budgets; Executive Director: “I do the desktop.”
- We don’t put money on overhead — we’d rather **invest it in client**.
- 90% budget goes to staffing resources to work with client. We have to be very creative with remaining 10%.
- Again, philosophy: staff and volunteers’ commitment way beyond the call of duty.
- Part of it is the way they’re hired and treated.
- Commitment — willing to work for us because they’re committed to the cause of the organization.
- Funding is different – services sometimes funded intermittently, a new government may be elected which may wipe out whole funding line; at mercy of the whims of funders, our whole program structure might change.
- For profit is more lucrative, will go where the money is.
- We don’t address “high-tech” needs, e.g., we opened a chip wagon.
- Type of program, very subject to whims of government, e.g., Mike Harris (cuts) — “we’re still stuck with our chip wagon.”
- We can’t buy 20 Pentium IIIs, still have 286s, 386s in literacy program.
- 8-10 years ago different (for profit sector?); however now we’re competing for same funds; not so different.
- We must be business focused now; you must have x amount success for this amount of money this year.
- In profit, it’s “how many students.” (drawing a parallel).
- Many of us work in multi-disciplinary teams, making for “*one-stop shopping*.” We work on interventions, instead of just coming to last piece where person is unemployed. We work on *prevention* as well. Both. How to avoid. Prevention. Advocacy, not just “intervention.”

**Question 2: If you were to play role you play now, but in private sector, how would it be different?**

- Would feel less connected to community I serve — a good part of my job now involves being in contact with the community, working with them. Would work less with them.
- When there’s no money, project would be put on hold. Cannot be late with money. Client can be put on hold for financial reasons.
- Would like to think who I am will be same in both.
- Profit not always the villain.
- 1st money, 2nd the client; us (non-profit) 1st client, 2nd money.
- My working hours would be more stable. I wouldn’t work less hard, but I would have a more stable schedule. That would impact on my family life, hobbies, etc.
- Amount of profit will change (affect) flexibility.
- Money — driving force. Not as flexible for what needs to be done for client.
- May go to more expensive location to have better image.
- May be in ordinary setting (non-profit), but quality of services is same.
- I’d probably dress better.

- Appearance. Outside image.
- I would only see mainstream, forget other people; wouldn't realize what's going on.
- Employer satisfaction, appreciation based on *number of clients* brought in vs. *quality of service* delivered.
- Choose client. But goes beyond image — implied confidence; pay you for "piece of paper" I get, says "blah, blah, blah... in business."
- In non-profit seen as "poor desperates." "What am I doing here?"  
Credibility. People have image service not going to be as good.
- See people as on social assistance. Perception: Quality of training might not be there. Perceive would make more money doing what you do. Better benefits. Even clients tell us we could make more money elsewhere. After several years, a client may see us and say "I'm surprised you are still here."
- Commitment — you're staying there; reward is you see people getting jobs, moving on; we get personal rewards.

## appendix B

### sample questionnaire to validate the CBT job chart

The Canadian Coalition of Community-Based Training (CCCBT) recently conducted a series of focus groups across Canada in an effort to define the CBT sector. Attached please find a Job Chart which defines our sector in terms of functions and skill levels and the roles within these functions/skill levels. This chart requires validation and/or revision from the CBT community before further work can proceed. The CCCBT asks you to review the Job Chart and answer these questions:

1. What level in the chart is your current position?  
 Board                       Executive Management       Staff
2. Overall, does the chart appear to capture the scope of work within the CBT sector?  
 Yes                               No
3. Does the chart make sense to you? Is it not confusing or unclear?  
 Yes                               No
4. Please review the functions and sub-functions of the chart. Are any functions or sub-functions missing?  
 Yes                               No

If "yes," what functions or sub-functions would you add, and why?

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5. Are any functions or sub-functions there that do not need to be?  
 Yes                               No

If "yes," what functions or sub-functions would you remove, and why?

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6. Do any of the definitions of the functions and sub-functions require revision?  
 Yes                       No

If "yes," which would you revise and how?

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7. Please review the skill levels of the chart. Are any missing?  
 Yes                       No

If "yes," what skill levels would you add, and why?

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8. Are there any skill levels that are not necessary?  
 Yes                       No

If "yes," what skill levels would you remove, and why?

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9. Please review the roles listed within the cells of the chart. Are any missing?  
 Yes                       No

If "yes," what roles would you add, and where? Please indicate sub-function/skill level.

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10. Are there any roles that should not be there?

Yes

No

If “yes,” which roles should be removed, and from where? Please indicate sub-function and skill level.

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11. Do you have additional comments about the chart?

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## appendix C

### tabulation of questionnaire to validate the CBT job chart

October 2000

#### Background

A copy of *A Study to Investigate, Analyse and Organize Community-Based Training Roles in Canada*, a poster showing a Community-Based Training (CBT) Job Chart and a questionnaire to validate the chart was distributed to 88 participants in August and September 2000. Participants were chosen to ensure a representative group of board, executive, management and staff from CBT organizations across Canada. A total of 32 responses (a 36% response rate) was received. Of the 32 responses, all 32 (100%) agreed that the chart captured the scope of work within the CBT sector.

#### Preamble to Questionnaire

The Canadian Coalition of Community-Based Training recently conducted a series of focus groups across Canada in an effort to define the CBT sector. Attached please find a Job Chart which defines our sector in terms of functions (e.g. Case Management/Counseling/ Advocacy) and skill levels (e.g., Executive, Staff), and the roles within these functions/skill levels. This chart requires validation and/or revision from the CBT community before further work can proceed. CCCBT asks you to review the chart and answer the following questions:

1. What level in the chart is your current position?

Board	Executive	Management	Staff
2	8	15	7
2. Overall, does the chart appear to capture the scope of work within the CBT sector?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
32	0
3. Does the chart make sense to you (i.e., it is not confusing or unclear)?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
29	2

  - Somewhat confusing as I have many roles
  - Not entirely.
4. Please review the functions and sub-functions of the chart. Are any functions or sub-functions missing?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
5	25

If “yes,” what functions or sub-functions would you add, and why?

- I think all has been entered
- Because of its importance to our funders, I think the service delivery function could use the addition of a “reporting” sub-function. There is a definite skill to doing this task, and ensuring that it is performed correctly for the receiving party i.e. — CAIS, referring worker etc.
- Pg 31 — Manage Human Resources — add policy revision & dev.
- Pg 32 — add community referral process
- Perhaps “Purpose” or “Missioning” could be pulled out as a separate function instead of as a part of strategic planning (NFP missions is another distinct variable from FP). Also reword page 29 under conduct strat planning.... from provide **oversight** providing mission... to provide overall mission
- Function — Information Technology should include references to on-line activities, web-based technology
- The functions and sub-functions are well laid out and reasonably comprehensive
- No, there is enough details
- Planning: it is urgent that CBT start to look at the future
- Multi-service partnership — collaborative developments and resource sharing — joint programming etc.

5. Are any functions or sub-functions there that do not need to be?

- Yes                       No  
2                                      28

If “yes,” what functions or sub-functions would you remove, and why?

- Job maintenance seems too specific include role titles under prog serv. and case management
- I liked the distinction drawn between “proactive” and “reactive” program development. The sub-functions also seem to cover different perspectives i.e. at the agency level as well as the client level, which is an important feature
- Not all may apply in **all** operations/agencies
- Job maintenance may not be of our mandate
- Isn’t function strategies planning already included in development
- Community economic development CEO.

6. Do any of the definitions of the functions and sub-functions require revision?

- Yes                       No  
3                                      25

If “yes,” which would you revise and how?

- Client follow up should also be included in sub-function or program services because it is part of the service although we also use it to evaluate the success of the program
- Job Coach — too specific
- Maybe some confusion, Function — Marketing as a term, may be related to Business Development and/or Resources Development as well as to marketing/placement of clients. Many agencies do not refer to place activities as

“marketing”, but use the term to refer to marketing of the organization as a whole. Seems that placement activities fit better under “service delivery”

- R&D — client follow-up & Prog. Eval (QT) needs to include mgt & staff levels
- Difficult to answer
- It is important to mention the effort put in the negotiation of agreement with funders.

7. Please review the “skill levels” of the chart. Are any missing?

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2                            | 26                          |

If “yes,” what skill level would you add, and why?

- First, I think the term “skill levels” should be changed to a term like “Organizational level” The present term leads to a presumption that skill level drops going from left to right on the chart — this is often not the case
- I can’t find skill levels — not sure what question refers to
- Although I do think it is important to recognize that there is considerable overlap between various skill levels in smaller organizations
- Clients &/or users
- In service delivery or R&D add product development
- Development Manager — this is an executive or management level depending on organization size and resources. So it can straddle the two skills.

8. Are there any skill levels that are not necessary?

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 0                            | 29                          |

If “yes,” what skill levels would you remove, and why?

As above.

9. Please review the roles listed within the cells of the chart. Are any missing?

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3                            | 27                          |

If “yes,” what roles would you add, and where? Please indicate sub-functions, skill level.

- Once again I think that the value placed on reporting/follow up should be recognized. Our admin assistant has to have enhanced skills to know the many facets of our programming. There is no way that a straight “data entry” person would be able to handle our reporting requirements. Possibly these roles could be under a “Reporting” sub-function of service delivery
- I think it is important to remember roles are not always that clearly defined in Organizations. Overlap does occur
- Life Skills Coach under case management
- Not sure. Where do we stop? In working with certain client groups e.g., Mental Health Clients — you may also have an art therapist on staff — for vocational rehab clients will have other professionals — perhaps

physical/occupational therapist and on it goes...

- Sub-function, client follow-up & program evaluation roles under mgt & staff Data Manager / program evaluator
- no but.... You seem to have covered a wide range of roles — however, what I think is missing is greater role clarification
- there appears to be a high focus on Employment Services
- more recognition of non-employment day services (non-residential).

10. Are there any roles that should not be there?

Yes                       No

1                                      28

If “yes,” which roles should be removed, and from where? Please indicate sub-functions and skill level.

- I find the matrix to be somewhat confusing
- General terms such as “none exclusively”, “All” or “All may contribute” are not helpful. Perhaps you should acknowledge that roles necessarily overlap. Prior to the actual Matrix, as a general type of qualification. For example, under the function for Advocacy & Awareness, listing “All” for each skill level is not helpful, nor is it very accurate according to my own experience. Although it is true that all skill levels may contribute to general advocacy, this is not a **main** aspect of my own role as an instructor or employment counselor rather, it’s more accurately described as a “value-added” service that I might provide in a given context. I think the Matrix roles need to be more specific and limited to the main or major roles performed by a given employee
- In technical support there is no place for the executive or management.

11. Do you have additional comments about the chart?

- I think the Matrix does an excellent job of highlighting the organizational pieces of the typical CBT. All of the roles that I have encountered in the industry are mentioned on the grid. It was good to see the recognition that all “levels” are generally involved with each of the functions of the CBT
- Quite comprehensive
- The Matrix is a comprehensive table details all aspects of Community-Based training. It defines all roles/functions of community programs. I think it’s a good tool for myself in planning and developing programs operations
- Helpful to have a definition of community-based training — what’s example of training (albeit FP industrial institutional) that is not community-based
- Perhaps replace “job” with employment to better reflect de-jobbing and to better include folks who employ their time with non-paying functions
- Organization sometime w/s tranz. Page 36 how they serve — I’m not sure I agree w/comments re: institutional & private providers. A **bit strong** saying **only** interested in provision of service not needs of client. My experience says more on needs of industry (which in turn serves the clients). More FP input would have been useful. I will use this Matrix well done

- Looks very good to me
- In terms of our particular environment, all the areas covered in the Matrix appear to be appropriate
- None — interested in seeing the end result of your efforts
- It can & will be very useful to agencies for working on organization flow charts, job descriptions, etc.
- Very thorough! Thanks!
- It appears to be very comprehensive, well thought out. Clear
- I think we will see information technology impact our sector, particularly as we will compete with on-line resources available for Client Services. We should recognize the need for practitioners & agencies to stay current
- I am perhaps biased because I participated in the development, but I believe that is an excellent tool — visual, easy to use, to the point, and very pertinent and true to our sector
- Comprehensive & represents this agency as well as others in the region
- It appears to be a comprehensive document. I looked for the one thing that I feel I do that most EDs don't have to bother with property management (The society owns the building that houses all of its projects) — I found it under Business Development. To me — the matrix is complete
- I found that Matrix to be very thorough & comprehensive giving a clear indication of all players' roles. Responsibilities when you're involved with community-based training from the board level through to the staff level and from program development to operations/management
- Very impressive! Very detailed!
- It appears very comprehensive and logical. I feel it presents our sector relatively accurately
- A good job
- Working in an organization with 10 staff eliminates a majority of these positions and skill levels
- Unless one is personally involved with CBT it's difficult to do this questionnaire. What applies to ADAPT services many not apply to CBT and vice versa
- The work is completed but could be more synthetic for certain competencies
- Sorry to not have had the time to do a complete analysis of the document, I would have been in a better condition to answer
- Planning and there is nothing about future
- Interesting and complete
- Very elaborate
- Fine research describes the different work sector
- It's comprehensive but seems to lack awareness of the trend to merge with community economic development organizations and the focus on self-employment, co-op development, entrepreneurship etc. CBT and CED are very close philosophically and are merging in CBTs starting businesses
- Very broad open to interpretation
- Unclear of what CCCBT is (purpose, mandate etc.).