

TITLE: Understanding Workplace Documents

ESTIMATED TIME: 2-2.5 hours

LESSON OBJECTIVES:

After completing this lesson, students will be able to apply the following to common workplace documents:

- Analyze development of ideas in informational text
- Express own ideas and expand on the ideas of others
- Expand use of pre-reading, while-reading and comprehension strategies

Essential Vocabulary:

- document
- instructions
- memo
- performance review
- employee
- manager
- recommended
- required
- strategy

Materials Needed:

- Handout with example of “Talk to the Text” strategy
- Sample memos:
 - 2 communicating good news
 - 2 communicating bad news
- Sample performance reviews
 - One with minimal areas of improvement
 - One with major areas of improvement



WARM UP (10 minutes):

Welcome students to the class. Once the class is settled, ask them:

*What types of materials do you read at work?
 Have you ever misunderstood something in a written document?
 What happened?*

Ask students to share their real-life stories and experiences. Start creating a list on the board for the types of readings they do at work - *Reading at Work* (list types of documents).



INTRODUCTION (10 minutes):

Tell the students the following:

In the workplace, you will come across many documents you need to read. To understand the sender’s message, you need to understand tone and purpose. Let’s work together to evaluate two documents. Then, you will work in a small group or with a partner to analyze another set of documents. Finally, you will work independently to evaluate a document on your own.



PRESENTATION (30 minutes):

Walk students through two sample workplace memos using the “Think Aloud” and “Talking to the Text” (TTTT) strategies from Reading Apprenticeship (see *Online Resources and Appendices for more information*). One memo should deliver good news and the other should communicate bad news (*samples provided in Appendices, or use your own*). Model for the students the process of thinking aloud and talking to the text. Ask them to share their input as well, so the activity becomes interactive. Make notes on the text while projecting, so that the students can see your process. Also explain the difference between TTTT and annotating (e.g. making notes about your reaction to the text, rather than summarizing the text to show understanding).

From: <https://rtc.instructure.com/courses/1056743/pages/talking-to-the-text>

Help the students generate a list of questions they will use in the next activity, when they apply these techniques themselves. Some questions to consider may include:

- What is a memo? Is “memo” short for another word?
- Is the memo communicating good news or bad news? How do you know?
- What is the purpose of the memo: information (e.g. status update), persuasion, something else?
- Who is the sender? Who is the recipient?
- Is there a call for action?
- Are you being *requested* to do something or *required* to do it?
- Do you have any questions about the content of the document?



GUIDED PRACTICE (30 minutes):

Distribute two new memos (*samples in Appendices*). Ask students to work in pairs to read the memos. Each partner takes a turn doing the “Think Aloud” with one of the memos. The other partner does the same with the other. Students then take 5-10 minutes to “Talk to the Text” individually, then discuss the results with each other.



COMMUNICATIVE PRACTICE (20 minutes):

Small group work. After the pairs have evaluated the memos, each should find another pair and share what they discovered.

*Did the other pair notice anything you missed?
Did you catch something they didn't think of?*

Small group works together to come up with a list of questions to ask the sender of the document, either to clarify or follow up. Share back results/highlights with the whole class.



APPLICATION (30 minutes):

Without any preparation, distribute the sample performance reviews to students. Students work with a partner to use the “Think Aloud” method to predict what the document is about. Then, students go through the text individually and apply “Talk to the Text” strategy. Walk around the room and listen to the strategies that are being used and make note of items that stand out to debrief with the students after the 30 minutes are up.

On the back of the performance review, ask students to write a brief summary about the review.

*Was it positive? Negative?
How would you feel if you received a review like this?
What employee accomplishments are highlighted?
Are there any areas for improvement?
Are there any action items for the employee?*

If there is time left over, discuss students’ process and how they felt doing these activities. See whether they can see the benefit of using “Think Aloud” and TTTT. Remind them that this is a process that won’t be completed perfectly. It is something that needs to be practiced regularly to create good reading habits.



EVALUATION:

Formative Assessment: Circulates around the room during APPLICATION to make sure students get the “Think Aloud” concept and use it properly (make suggestions for improvement as necessary).



EVALUATION:

Summative Assessment: Collect “Talk to the Text” notes and summary from the performance review from each student to confirm understanding and application.



EXTENSION:

IDEA ONE:

Have students bring in examples of documents they must interpret at their current jobs. Use as samples for groups to tackle, applying RA routines/techniques.

Examples may include documents or excerpts from documents such as:

- Performance review
- Job posting
- Product catalog
- W2 form
- Timesheet
- Paystub
- Incident report
- Safety check
- Quality control checklist
- Internet usage policy
- Manual (technical, employee, etc.)
- Employee contract
- Email - between co-workers; from supervisor to employee(s)

IDEA TWO:

Give students a series of sentences that are not in logical order. Ask students to organize the information so that the meaning is logically and effectively conveyed. They should combine sentences, add necessary punctuation, and divide into paragraphs. Ideal content can be organized in several ways.

CORE LESSON COMPONENTS:

BASIC COMMUNICATION:

- Apply workplace vocabulary
- Ask questions to clarify ideas and conclusions
- Express own ideas and expand on the ideas of others

COLLEGE/WORKFORCE PREP:

- Develop a list of questions to ask a career-related representative

DIGITAL PREP:

- Use collaborative technologies to work with others

21ST CENTURY SKILLS

- Critical thinking skills

CORE LESSON COMPONENTS:

- Collaboration & leadership
- Oral communication
- Written communication
- Access & analyze information

ONLINE RESOURCES:

“Think Aloud:” <https://rtc.instructure.com/courses/1056743/pages/think-alouds>

“Talking to the Text:” <https://rtc.instructure.com/courses/1056743/pages/talking-to-the-text>

Reading Apprenticeship Framework: <https://readingapprenticeship.org/wp-content/uploads/2014/01/RFU-Ch-2-Excerpt.pdf>

Metacognitive Bookmark: <https://readingapprenticeship.org/wp-content/uploads/2014/01/RFU-ch-4-metacog-bookmark.pdf>

Metacognitive Reading Log: <https://readingapprenticeship.org/wp-content/uploads/2014/01/RFU-ch-4-metacog-reading-log.pdf>

Metacognitive Reading Log Pair Work: <https://readingapprenticeship.org/wp-content/uploads/2014/01/RFU-ch-4-metacog-log-pair-work.pdf>

ADAPTATIONS (Approximate Time):

Multi-level: One way to scaffold the activity is to have lower-level students evaluate only one memo or document, instead of two. You can also eliminate the independent work in the final practice activity and have students continue to work in small groups or pairs if they need the additional support.

High Tech: Using a computer & projector, demonstrate how to use the Track Changes feature in Word to make and share notations.

Low Tech: Make notes with a pen/highlighter and project via document camera for the students to follow along.

No Tech: Create and copy handout before class with sample notations and give to the students to follow along. Give first copy **before** Presentation. Give second copy **during** Guided Practice. Give last copy **after** Application.

TEACHER TIPS:**STRUCTURE**

This lesson uses a basic “I Do, We Do, You Do” structure. First, do a whole-class activity to demonstrate the process. Next, divide students into small groups or pairs to apply the techniques demonstrated in the whole-class activity. Lastly, give the individual students an opportunity to work independently to demonstrate their understanding of the reading techniques demonstrated in the first activity and practiced in the second activity.

FINDING CONTENT

Samples are provided in the appendices, but you can adapt or create your own to support the learning outcomes for your class. Do a Google search to find additional samples, or write your own. Use the document content as a means to convey other workforce-related topics. For example, if you are covering “how to apply for a promotion,” perhaps some documents could be job postings (i.e. help the students see how to read the job posting and determine if they are qualified for the new job).

APPENDICES

- ✓ Think Aloud (Reading Apprenticeship strategy/tips)
- ✓ Talking to the Text (Reading Apprenticeship strategy/tips)
- ✓ Sample Memo #1: Communicating Good News [bonuses for a job well done]
- ✓ Sample Memo #2: Communicating Bad News [employee violation of smoking guidelines]
- ✓ Sample Memo #3: Communicating Good News [recycling program launch]
- ✓ Sample Memo #4: Communicating Bad News [topic]
- ✓ Sample Performance Review #1 [needs minor improvement]
- ✓ Sample Performance Review #2 [needs major improvement]

Sample Memo #1

COMPANY XYZ

May 16, 2018

TO: All company employees

Please note the addition of "Bonus" to your paycheck for this week. It's been a long time coming and it's taken a lot of hard work to accomplish our goals, but we have done it! Your bonus is a reflection of our appreciation for your efforts, and another way of saying thanks for a job well done!

As our future outlook continues to improve, we will do our best to provide bonus incentives to our employees. We're striving to nurture an environment of such that when the company does well, our employees are recognized accordingly.

Thanks a million for all of your work, patience, help and support while things have been changing.

If you have any questions, comments, suggestions or other information/feedback of use, please let me know.

Thanks again!

Manager Joe Smith

Sample Memo #2

AGENCY 123

TO: All Managers
FROM: Company President
SUBJECT: New Smoking Policy
DATE: May 16, 2018

The Agency smoking guidelines were communicated to all employees at the company meeting in January. In the past few months, there have been complaints by some employees that these guidelines are not being followed by their co-workers. Some are taking breaks that are too long or too frequent, and others are smoking in front of the office building, rather than in the designated smoking area.

You are expected to take the lead with this important issue. Please take whatever steps are required to ensure that the new procedures are being followed. As a reminder:

- There is no smoking inside or near the front entrance of any agency building.
- Smoking is permitted in one designated area only (outside patio).
- Employees who smoke during work hours must do so during regular breaks (10 minutes in morning, 10 minutes in afternoon).

Please let me know if you have any concerns or questions. Thank you for your support.

Sample Memo #2

ABC COMPANY

DATE: May 16, 2018
TO: All Employees
FROM: Recycling Coordinator
RE: New Recycling Program

As of today, ABC Company recycles! We are excited to launch a new recycling program, which will help us divert waste and do our part to reduce our impact on the local community.

The recycling program is simple and straightforward – and it will require a few small changes in our daily habits.

Work stations. Each of you will have a new blue recycling container located at your work area.

Common areas. We are also placing blue containers in the kitchen, break room, and conference rooms.

Please make an extra effort to recycle the following items commonly found in our office:

- *Paper of any kind (newspaper, printer paper, magazines, letters)*
- *Cans (beverage, soup, etc.)*
- *Cardboard of any kind*

Beginning June 1, we will hold a series of brief 15-minute recycling program orientation meetings to give all employees an overview and answer your questions. **You must attend one orientation.**

The success of the program is on all of our shoulders! ABC Company remains committed to environmental causes and leading by example. Thank you in advance for your support. If you have any questions, please direct them to the Recycling Coordinator.

Sample Memo #2

ABC-123, INC.

DATE: May 16, 2018
TO: All Employees
FROM: Management Team
SUBJECT: Employee Bonus Update

We regret to inform to you that due to the current economic recession, the management has decided that you that we will not be giving a bonus to our employees this year. We find this action necessary in order for us to cut costs due to recent financial events.

We understand that this will create some difficulties for you, but we believe that taking this step is far better than laying off several employees or cutting down salary or benefits. With your help, this will be only a temporary setback. Should any other changes arise, we will inform you.

We have experienced downturns before and rebounded perfectly well. We are confident this slump will improve as the next fiscal year begins. Your continued excellent work will surely allow our company to recover from our current financial situation very soon.

Thank you for your understanding. Please contact your direct supervisor with any questions.

Sample Performance Review #1

Employee Performance Evaluation	
Employee Name <u>First Name Last Name</u>	Review Period <u>7/15/2011 - 7/15/2012</u>
Position <u>Administrative Assistant</u>	Department <u>Operations</u> Employee Number <u>0347</u>
Prepared by <u>Supervisor First Name Last Name</u>	Date <u>7/18/2012</u>
<p>1. For each of the items listed below, please comment on the employee’s performance, providing examples of what he or she does well, along with suggestions for improvement.</p>	
Computer Skills	- Outstanding mastery of new information system; excellent word processing skills. - Needs to become more proficient with Excel and Crystal Reports.
Professional Communication	- Demonstrates positive communication skills with co-workers and management. - Needs to work on public speaking skills to become more comfortable making presentations and training co-workers in group settings.
Customer Service	- Consistently receives positive feedback from customers; conveys a customer-focused attitude with external customers, as well as with other departments within the organization.
Initiative	- Shows initiative by identifying areas where improvement is necessary within the department and offering positive suggestions for improvement.
Problem Solving	- Has strong problem-solving skills; is able to recognize when problems may be developing and acts proactively to resolve them.
Teamwork	- Works well with co-workers and exhibits a team-focused mindset.
Co-worker Relations	- Has positive relationships with co-workers and is respected by peers.
Work Ethic	- Demonstrates a positive work ethic; takes pride in performing quality work.
Adaptability	- Willing to adapt to change; avoids being change resistant and sets a positive example for peers when change is needed.
Commitment to Company Mission, Vision & Values	- Consistently exhibits behaviors that properly represent the company’s mission, vision and values.
Professional Growth & Development	- Needs to become active in one or more relevant professional organizations. - Needs to identify and complete training necessary to prepare for long term career goals within the company, including leadership and management training

Sample Performance Review #2

Employee Performance Evaluation

Employee Name First Name Last Name Review Period 7/15/2011 - 7/15/2012
 Position Sales Representative Department Marketing Employee Number 0347
 Prepared by Supervisor First Name Last Name Date 7/18/2012

1. For each of the items listed below, please comment on the employee’s performance, providing examples of what he or she does well, along with suggestions for improvement.

Computer Skills	- Employee possesses the computer skills needed to perform her work.
Professional Communication	- Knows sales presentation script very well and presents it to customers in an effective manner that results in consistently meeting or exceeding sales goals. - Needs to work on improving professional communication with co-workers within the sales department and other personnel.
Customer Service	- Exhibits positive communication and behaviors with her customers. - Needs to work on exhibiting the same customer service focus with customers assigned to other sales representatives and co-workers.
Initiative	- Shows initiative by coming up with unique ways to identify prospective customers and to cross-sell company services to existing customers.
Problem Solving	- Has strong problem-solving skills regarding the sales process. - Could benefit from applying problem-solving abilities to improving co-worker relations.
Teamwork	- Is not perceived by co-workers as someone who exhibits positive teamwork; is seen as a sales representative who is “out for herself”. - Needs to work on becoming more of a team player.
Co-worker Relations	- This is the area where improvement is primarily needed. - Work with supervisor on a plan to improve relationships with co-workers.
Work Ethic	- Has an outstanding work ethic in terms of ensuring that the needs of her customers are met.
Adaptability	- Handles changes in product mix and sales process effectively, adapts readily to changes in sales procedures.
Commitment to Company Mission, Vision & Values	- Understands company mission, vision and values and applies that knowledge to sales and customer service. - Needs to expand and apply that understanding to workplace communication, focusing on building positive relationships with co-workers.
Professional Growth & Development	- Develop more effective interpersonal communication and teamwork skills as applicable to the workplace.