



T U T O R S ' T I P S

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The Initial Interview

Why do an Initial Interview?

One of the challenges of teaching in the field of adult literacy or numeracy is to provide a learning environment that fits the needs of the client. Many clients have not learned to be literate and numerate in traditional learning situations, and it takes a good deal of courage to tackle their problems as an adult. For this reason alone, it is essential that the clients' first contacts are reassuring. They should leave the initial interview feeling that their difficulties have been identified and understood by an empathic person. They should be confident that with some effort they will be able to improve their skills in the new learning situation. The initial interview is not meant to be a formal or standardized test. Although finding out about the client's skills is important, it is also interesting to discover their personal qualities and attitudes, their goals, what they need to learn and how they think this may be best achieved.

Clients will also need to review their learning occasionally. A similar procedure can be used with a client who has been learning for a period of time, but wants to move into the next stage or make a change. Often a teacher will conduct an initial interview, but the client may elect to be placed with a volunteer tutor. Even though the tutor may be given the student profile, he or she may find it useful to conduct a more focused assessment at the first lesson to confirm the client's goals and needs.

Guiding Principles for the Initial Interview

- The experience should be positive for the interviewee.
- The assessment tools used should be varied, to allow the client the chance to demonstrate their full range of skills.
- Personal information needs to be gathered only if it relates to the placement of the client in the best program of study.
- The topics of the assessment tasks should be familiar to the client.
- The processes to be followed in the interview and the assessment should be made clear to the client.
- If a third person such as a carer or family member is present, the questions should be addressed to the interviewee and the responses should be his or hers.
- If necessary, the interviewee may be referred to specialists such as counsellors for further support.
- Information revealed by the client during the interview should be confidential and only be revealed to those who need to understand the client's background for educational purposes.
- Approximately an hour should be allowed for each interview to be conducted thoroughly.
- Assessors should have appropriate training.

The Goals of Initial Interview

- Determine the level of ability of the client
- Gather information about the client's background (educational, cultural and family life, work situation, health issues, feelings about reading, writing or numeracy)



- Identify the literacy and numeracy competencies of the interviewee
- Discover the client's preferred learning style, interest, motivation and attitudes
- Discuss the client's immediate needs and priorities
- Find out how much time the client has for study and what days and times are suitable
- Inform the client of the range of courses available
- Decide if a class or a tutor is the favoured option
- Give specific information about the chosen learning situation in writing (teacher, tutor, times, start and end date, venue, cost, expectations)



A Plan for Conducting Initial Interview

1. Organise your resources

- Gather a range of authentic texts suitable for reading.
- Choose texts that are likely to be familiar and locally relevant to clients (eg. ads, notices, bills, medicine labels, newspaper articles, notes, letters, menus, recipes, maps, street signs).
- Make sure these will suit clients of all ages, interests, levels and cultural backgrounds.
- Prepare comprehension questions which require a range of reading strategies for each text.
- Have a list of writing tasks ready. (eg. fill out a simple form, write a note, post card or letter, write about goals, describe family, write a work related document such as a memo or report)
- Categorise reading and writing tasks into four types or levels, such as beginner, post beginner, intermediate and advanced, but do not use labels such as "Grade 2 Level".
 - Prepare a range of numeracy exercises. (eg. simple operations, more complex operations, fractions, decimals, percentage, diagrams, graphs, time, measurement, problem solving)
 - Develop a suitable proforma for your questions and note taking.
 - Have a current list of classes, times and venues handy.

2. Organise the interview space

- Ensure your interview space is private and welcoming.
- Have comfortable chairs and a table for writing.
- Have your resources easily available.
- Arrange the furniture so you can see what the client is reading and writing.
- Have some toys or colouring materials available to keep children amused in case they accompany parents.

3. Make the interviewee feel comfortable

- Introduce yourself clearly and wear a name tag.
- Shake hands if appropriate.
- Offer a glass of water or cup of tea.
- Have a short chat about the weather, parking, etc. to relax the interviewee.
- Explain what you will be doing in the initial interview.
- Tell the interviewee that the information given during the interview will be confidential.
- Observe and react to the client's body language.

4. Begin asking about the client's background

- Use the interview proforma as a guide, but be flexible if the client leads the conversation.
- Find out about the client's educational and family background, interests and hobbies, learning problems, perceived difficulties, work situation, present needs and priorities and feelings about reading, writing or numeracy.
- Try to maintain eye contact and listen actively rather than write constantly. You can always add to your notes after the client leaves.

5. As a result of this discussion, estimate the probable stage of the learner

- Select a reading and writing task that you think the client may be able to handle.
- Consider the age, cultural background and interests of the client when making your choice.
- Pick something that is likely to be familiar and interesting. Sometimes it is possible to ask the client to select from a choice of tasks.
- If the client wants to attend numeracy classes, have numeracy tasks ready also.

6. Explain the purpose and procedure for the assessment tasks.

- Ensure the client understands that this is not a "test"; rather it is a method of finding the best learning situation.
- Make sure they are comfortable with the task - say they can get help with it or exchange it for an easier task.



- If the task is too easy, try something harder from the next level.
- Tell the client that there is no time limit.

7. Completion of the tasks

- Ask the client to read the text aloud, or if this makes them uncomfortable, they could read silently.
- Note how the client reads, including skills such as ability to decode words, fluency, use of contextual clues, ability to predict and self-correct, miscues or pronunciation.
- Either read the comprehension questions to the client and write their answers, or ask the client to do this if they are capable. Alternatively, ask them to summarise the gist of the texts.
- Note the client's understanding of key words and phrases, structure, main ideas, explicit and implicit meaning in the text and attitude of the writer.
- Explain the writing task and give some suggestions for what the client may write about.
- Discuss with the client how much they can write. Some people will happily write several paragraphs, while others can only manage a few words.
- Ask the client to complete the writing task.
- Note writing skills such as spelling, sentence structure, grammar, punctuation, vocabulary use, expression, hand writing, editing skills.
- During the interview, note the speaking and listening abilities of the client. Pay attention to any speech or hearing impairments.
- If appropriate, give the client a numeracy task to complete.
- In examining the numeracy response, check for competency in locating key mathematical information, calculating, estimating, checking answers and being able to use mathematical vocabulary.

8. Discuss the results when the student has finished.

- Give some encouraging feedback
- Briefly explain any mistakes made and perhaps try to "teach" something so the client feels he or she can learn.
- Talk to the interviewee about what the assessment tasks indicate about their needs and discuss how he or she may benefit from a range of learning situations.
- Tell the client what you have written about their problems and needs.

9. Determine the best learning situation.

- Tell the client about the options (eg. class or tutor, times and days, venues)
- Make a recommendation about what you think would work well.
- Negotiate the best situation to suit the client's needs.
- Consider child care and transport issues.

10. Confirm the arrangements.

- Write the details down for the client (eg. day, time, name of teacher or tutor, contact phone number, start and end dates, venue, cost)
- A form letter is useful - you can handwrite the specific information at the time of the interview.
- Provide a map if necessary.
- Discuss what the client needs to bring to the lesson.
- Tell the client what to expect in the class or with the tutor.

11. Check the notes.

- Add any extra details you did not have time to note during the interview.
- Note any help you gave the client to complete the tasks.
- Note strategies the client used to tackle the tasks.
- If the client was not able to complete the tasks or took a long time, note this too.
- Add your impressions about the confidence or attitude of the client.
- Record details of the planned learning situation.
- Keep a sample of the client's writing.

12. Ensure the information is kept confidentially.

- Note any privacy issues (eg. silent phone number, family support, work concerns)
- File the form in a secure place.
- If a tutor or another teacher is given any information about the client, make sure they know that it is confidential.

Initial Assessment Resources

Fitzpatrick, L., Wignall, L. & McKenna, R. (1999) *Assessment and placement resource for the literacy and numeracy programme: Developing pre-training assessments using the National Reporting System*, ANTA Adult Literacy National Project • Franklin, V., Ryan, J. & Baker, K. (undated) *Adult literacy: the initial interview*, produced by TAFETEIQ (Video) • *Good Practice in Australian Adult Literacy and Basic Education*, (March 1990) Issue 7, Assessment and Evaluation, and (September 1989) Issue 5, Numeracy • Hildebrand, C. & Kelly, A. (1999) *Adult literacy numeracy initial assessment package*, TAFE Qld Language and Literacy Services • Hood, S. & Solomon, N. (1994) *Reading and writing assessment kit: Stage 1 Initial learner interview, Stage 2 Core kit, Stage 2 Support materials*, National Centre for English Language Teaching and Research • Lyons, S. (1995) *Assessment guide for adult basic education program in Victoria*. Adult Community and Further Education, Vic. • Navara, D. (1992) *Literacy assessment tasks for placement and referral*, NSW Adult Migrant English Service



Sample Topics for Initial Interview Proforma

(Allow plenty of room to write notes about each point or question.)

Date.....	Interviewer.....
Level.....	Class.....
Teacher / Tutor.....	Venue.....

Student Name.....
Address

Phone Numbers Home..... Work.....
Email Address.....

Date of Birth..... Country of Birth.....
Year of Arrival..... First Language.....

Why have you come to see me?.....

Educational Background

Year or age when you left school.....
Feelings about school.....
Extra help given at school.....
Identified or suspected learning problems or disabilities.....
Physical disabilities or health issues which effect learning

Training or courses completed since leaving school.....

Work History

Past work experience.....
Current employment.....
Reading and writing needs for work.....
Future work plans.....
Training needed for this type of work.....

Reading Skills

How do you feel about reading?.....
Would you read something every day?.....
What sort of things do you read?.....
What else would you like to read?.....
What do you do when you come to a word you don't know?.....

Writing Skills

How do you feel about writing?.....
What writing do you do?.....
What would you like to write?.....
What problems do you have when you write?.....
What do you do when you can't spell a word?.....

Speaking & Listening Skills

What problems do you have with speaking or listening?.....

Numeracy

What problems do you have with numeracy?.....
What would you like to learn?.....

Learning Styles

How do you learn?.....
Which of these learning environments would suit you best?
.....IndividuallyWith another personIn a small groupIn a large group

Student Availability

Days..... Times..... Transport.....
Other Relevant Information Which May Effect Learning.....
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