

Equal Initiative Project No F0576d2

**Model System of Staff Competences Adaptation
to Structural Changes in Economy**

supported by the European Social Fund

Sensitisation of SMEs about life long learning through the Model System of Knowledge Management

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Partnership PL-106



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Model System of Staff Competences Adaptation to Structural Changes in Economy

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**SENSITISATION OF SMEs
ABOUT
LIFE LONG LEARNING**

**THROUGH
THE MODEL SYSTEM OF KNOWLEDGE
MANAGEMENT**

DP PL-106

PARTNERSHIP PL-106 ACTIVITY FRAMEWORK– LABOUR MARKET TENDENCIES:

- Knowledge is more frequently perceived as an essential element decisive in gaining competitive advantage by the company (after soil, labour and capital). For this reason knowledge management becomes so important.
- Companies in order to sustain and develop must implement knowledge management.
- Education systems should meet challenges and support knowledge management processes: knowledge gaining, knowledge dissemination, knowledge practical use
- Serious problem that number of markets, including Polish suffers from is inadequacy of human capital in accordance to changeable labour market needs and insufficient adjustment of formal education programmes to real needs of companies.
- Awareness concerning the need of further training among employees is insufficient.
- Particularly small companies do not have cheap and efficient tools that can be used for knowledge management and employees' competences management. The companies do not analyse their needs according to vocational training of their employees.
- External trainings are, for number of companies, particularly micro and small ones are too expensive. As a consequence, many of them do not invest in further training of their employees.
- Companies seldom have procedures, tools and properly prepared human resources in order to carry out in-house training using own resources.
- External trainings in their nature do not match with the context and exact needs of companies that delegate their employees for such trainings.
- Level of employment in small companies do not allow for the absence of some employees. This is also a barrier in delegating employees to external trainings.
- More importance should gain, particularly in micro and small companies, non-formal training.
- Labour market problems ceased to be solely the internal problems of a single country. Globalization and European integration contribute to workers' mobility. In this context the lack of unified system of evaluation of competences gained in the non-formal education that could be recognized in the European Union becomes a serious problem.
- Dismissals of experienced workers in the age of +45 create an important social problem. This tendency leads to social exclusion and marginalisation. Companies get rid of elderly workers despite the fact that they possess resources of „hidden knowledge”. Such knowledge can only be passed solely through personal contact with apprentice. In situations when companies lack elderly, experienced workers,

young workers do not have possibility to gain “hidden knowledge”. Considerable knowledge is lost irretrievably when long term, elderly workers leave the company.

- In the situation of the risk of losing the job, commonly, the level of trust between employer and employee is low.
- Quantity data indicates gender discrimination mechanisms. Women experience it difficult to get promoted above certain level, even despite the fact that they have better managerial predispositions and are better qualified than men. This situation is defined as glass ceiling. Another serious problem is discrimination of young workers as regards their low level of post-junior high school education or lack of education at all.

Taking into consideration all the above mentioned tendencies by all Project partners the framework of actions has been formed, which is to: Elaborate model system; Sensitizing employers and employees on the need of life long learning; - Test and implement elaborated system.

PARTNERSHIP GOALS

The goal of Partnership PL-106 is to elaborate model system to support companies in Poland in knowledge management in the context of acquiring desired competences of the employees.

Goal 1

The elaboration of employees’ competences needs analyses system based on the implementation of procedures and tools facilitating mutual trust between employer and employee. Definition of training needs of the company’s staff in order to reach its strategic and operational goals. The system must also contain tools and procedures to create the concept of „tailor made” trainings and procedures and tools to control acquired knowledge transfer to workplaces. The goal is concrete and attainable with reference to the group of final beneficiaries, which represent light industry sector and chemical sector (management of the company and employees).

Goal 2

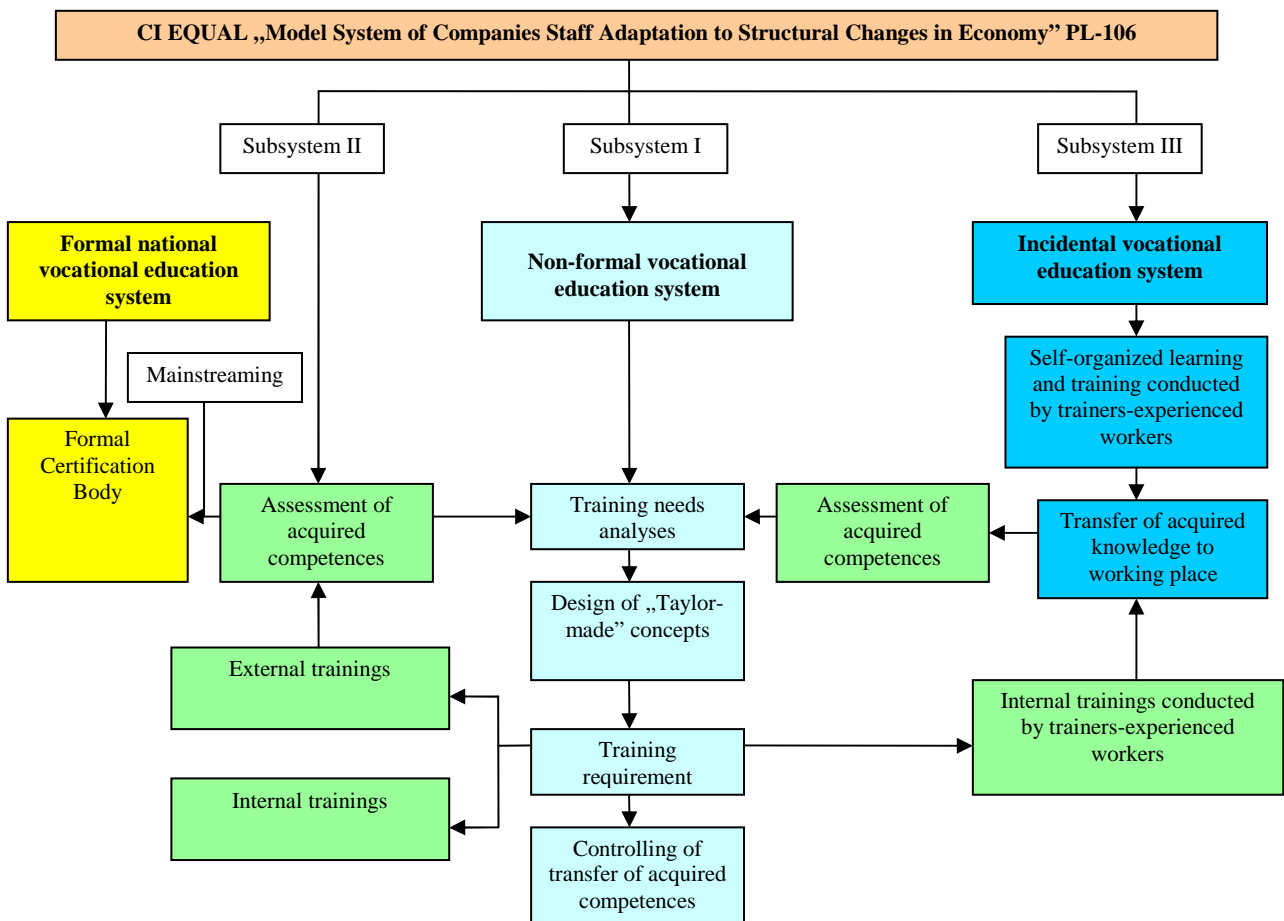
The elaboration of the system of the evaluation of qualifications acquired through non-formal in-house training. The system is based on procedures and tools enabling evaluation and recognition of qualifications. The goal is concrete and attainable with reference to the group of final beneficiaries, which represent light industry sector and chemical sector (management of the company and employees).

Goal 3

The elaboration of the system of use elderly workers to transfer their experiences and knowledge to their co-workers. The system is based on procedures and tools enabling selection of elderly, experienced workers (particularly those in pre-retirement age or those endangered on redundancy), training of the selected elderly workers (module "training of trainers") and use to transfer their knowledge to other co-workers within the framework of non-formal and incidental in-house system of acquiring qualifications. The goal is concrete and attainable with reference to the group of final beneficiaries, which represent light industry sector and chemical sector (management of the company and employees).

Goal 4

Dissemination of project results and mainstreaming



Model system supports adaptability of Polish companies to structural changes in economy – helps in creating knowledge management systems based on existing and desired knowledge resources and company staff qualifications.

In order to elaborate and implement such system, it is indispensable not only to work out appropriate procedures and tools that enable the creation of individual career paths as well as the launch of self-organized learning and training process, but also to sensitize the owners of companies, managerial staff and company's employees on the importance of further training in the aspect of company's condition and market position.

The creation of efficient knowledge management system in the company enables, in relatively short term, the adjustment of existing employment structure (employees, their knowledge and skills) to desired one that assures optima adjustment of the company to market conditions.

Better utilization of knowledge in the company contributes to the increase of the cognition of preferences level and surrounding expectations and better understanding of in-company processes, what results in more efficient recognition of change direction.

The control of acquired knowledge transfer to workplaces is an integral element of the efficiency control process to structural changes. The introduction in companies of training needs analyses system contributes to the recognition of own needs as regards further vocational training. Furthermore it requires from the company to define its strategic goals what improves quality management in companies.

Elaboration of tools for evaluation of qualifications acquired through non-formal in-house training will have an impact on increasing labour market flexibility. Introduction of career development tools contributes to attaching importance to professional criteria in the periodic employee evaluation. This results in constraining bias in granting promotions or rising salaries, including gender criteria.

The implementation of model system by the company increases its adaptability and a chance to develop on the market.

While elaborating the model system, real needs of the company, including practices and functioning conditions, have been taken into consideration.

The advantage of tested within the Project system is its flexibility. Certain toolkits elaborated within the system can be used separately and the system as entity can function even excluding its certain elements what will not constrain its effectiveness. Consequently, the advantage of this universal system is its potential to adept to specific context of each company and its wide practical application

The model system is an efficient tool that sensitise companies to life long learning – at the every stage of its functioning:

- acquaintance
- analyses of implementation possibilities
- testing
- modification
- complete implementation

One of major Project goals is to overcome psychological barriers. An important problem on labour market is lack of awareness concerning continuous vocational training among employees and unwillingness to supplement or change qualifications. Project implementation will make company employees aware of the need to develop, while the individual career paths design will facilitate the whole process.

The model system will contribute to filling the gaps in Polish vocational training system. These gaps do not remain neutral in shaping competition level of Polish companies. Obvious is the fact, that in order for the process of vocational training to be effective, it must be of complex character and must focus on the area of formal education, on different forms of non-formal trainings, as well as on other elements that ensure optimal conditions for qualification acquisition.

So far management of the companies and other players on educational area do not attach importance to non-formal trainings. Thus gaps in education system occur. They disable effective acquisition and utilization of knowledge in companies.

These gaps are among others area of employee education needs analyses, evaluation and recognition of vocational qualification and omitted in most of studies mechanism of self-organized learning and experience gaining (incidental education) process.

Model system equips companies in cheap, simple and effective tools that cover the existing gaps. The success of the system does not depend solely on companies. Consequently, activities undertaken by the Partnership focus also on other subjects.

Addressees of these activities must be also all business support institutions as well as public administration institutions connected to education system.

Mainstreaming and sensitizing activities are backbone of activities taken up by the Partnership in the period of April 2007 – March 2008.

PROJECT RESULTS BY PARTNERSHIP PL-106

Core results:

- to encompass 20 companies with created subsystems
- to encompass 400 employees with created subsystems
- intensification of education process(non-formal and incidental) in companies participating in the project
- creation or putting in order the structure of strategic goals in companies participating in the project
- creation of 100 individual professional development plans

Soft results:

- Better adjustment of human capital to company's needs
- Increase of trust between employer and employee
- Support in achieving strategic and operational goals in companies through recognition of training needs

- Integration of social partners participating in the project in achieving consensus on the ground of solving socio-economic problems

Model System of Support of Company's and Employees' includes:

- Tools and procedures for training needs analyses
- Tools and procedures for elaborating concept of „tailor made” trainings
- Tools and procedures for the evaluation of qualifications acquired in the non-formal trainings and evaluation of non-formal trainings quality.
- Tools and procedures to select experienced employees who possess desired knowledge and competences and have indispensable features to transfer them to younger co-workers
- Module of training from the area of teaching methodology for workers-trainers/advisor (coaches).

SENSITISATION OF COMPANIES – COMPANIES CHARACTERISATION

Partnership PL-106 placed its assumption that the best ideas do not stand a chance to be implemented if they are in no relation to a context.

Companies' representatives became key partners in the Project.

- Representatives of employers' organisations became partners of the project
- Representatives of trade unions' organisations became partners of the Project
- Representatives of companies became members of Project Managing Group
- All the model procedures and tools undergone tests in the companies

Very important is the engagement in the Project of scientific organizations. It can be expected that thanks to the participation in the Project, companies will start to co-operate on regular bases with scientific organizations, what will facilitate knowledge transfer from research area to economic activities.

It needs to be also highlighted that participation of company representatives will contribute to increase of trust between employees and employers, trade unions and employers' organizations. All that will be possible through common elaboration of tools and procedures of designer system.

Partnership co-operates with companies from light and chemical industry.

These companies accessed to the Project through formal declaration of participation. They expressed their expectations: flexibility as to the trainings (number of persons from one company, training dates); - compliance with confidentiality rules as to company market strategy. Moreover, these companies pointed out two major threats in case of investing in competences and knowledge of their employees. 1. labour costs 2. employees rotation. Number of companies from above mentioned sectors is In difficult situation and it often happens that they are forced to reduce production costs, what consequently force them to dismiss best (expensive in their opinion) employees. On

the other hand though, number of companies that took part in the Project, evolve in the direction of the creation of own product brand marks.

Employees of companies participating in the Project are persons from production worker, through master, shift manager, sales representative, and human resources manager to the managing directors.

Project encompasses 400 persons (15 companies from light industry and 5 companies from chemical industry). Number of persons delegated by the company to the training, has an important role for Project's result because these persons participate in tests of elaborated system of knowledge management.

It has been agreed to engage in the Project persons in more difficult situation on the labour market. For this reason, except for persons from the group of +45, persons of the age of 25-49 have been also selected.

Within the group of companies participating in the Project, both producers and trade companies became selected. The Project encompasses different size companies, from micro to medium and to different departments of big companies from chemical sector. It will enable universality of resolutions elaborated within the Project and possibility of easier adaptability to specific situation of diverse companies.

Among 400 employees, 170 women and 230 men have been selected.

Age range: Between 25-49 age: women - 70 persons; men – 100 persons
+50 age: women – 100 persons; men - 130 persons;

Education level:

Basic education: women – 30 persons; men – 50 persons

Professional education: women – 100 persons; men – 110 persons

Secondary education: women – 30 persons; men – 35 persons

High Professional education: women – 10 persons; men – 35 persons

Employee recruitment criteria– Final Beneficiaries representatives (light and chemical sector) are as follows:

- 1) employees 45+
- 2) employees between the age 25-49 (young persons – graduates)
- 3) employees with low education or lack of education
- 4) representatives of Managing Boards of Companies
- 5) representatives of middle management
- 6) employees from human resources departments
- 7) representatives of trade unions

Companies recruited employees taking into account discriminated groups ; +45 employees and persons with basic or lack of education. Each recruited person received positive acceptance of two independent subjects: trade unions acting in the company and management, and subsequently pronounced its will to participate In the Project In the formal declaration.

In the process of recruitment – equal chances in the access to the project were ensured. Disproportion of men and women participation, in relation of 58% to 42% comes from employment structure in the companies (more men in the group of management representatives).

Representatives of companies encouraged to participate in the Project through sensitization and rising of awareness as to Project implementation on company level, what helps in preserving existing workplaces. Elaboration of individual plans of professional development within the Project will motivate beneficiaries to actively participate in Project activities and even further, after Project realization.

SENSITISATION - EMPOWERMENT RULE AND PARTNERSHIP

Common Initiative Equal requires implementation of empowerment and partnership rule. In case of Project PL-106 this rule became an integrated element of sensitisation of companies to LLL strategy.

Implementation of empowerment rule in the project PL-106

Type of engagement	Description of actions
Promotion of individual engagement	In the course of the implementation of Action 1, the Project Management Group was established. MG is composed of the representatives of all partners and 2 representatives of companies participating in the Project.
Common responsibility and ability to act	Through the participation of company representatives In the Project Management Group, the sense of co-responsibility for Project implementation grows. Active participation in planning and project realization makes better understanding of the Project idea, and consequently proper implementation of planned activities and tasks. An important factor is also so called w. „co-authorship”
Participation In creation and modification of work plan	Representatives of Project beneficiaries are engaged In planning, implementation and evaluation of activities through their active participation In Works of the Project Management Group. The Project Management Group is a superior decision making body (all decisions are taken with simple majority voting). Project Management Group decides on financial and operational plans of each activity, finally evaluates activities, and decides to dispense financials to cover task realization.
Participation in activity realization and evaluation	Representatives of companies participating In the Project take active part in Project realization through testing and implementing in their companies. They will be also actively involved in process evaluation of Activity 2, including elaborated systems and trainings.
Change of attitudes and behaviour of sides within influence of Partnership	Through active participation in planning, realization and tasks evaluation, the attitude of company representatives will change. They will identify with the project. Moreover, companies will be independently testing created subsystems, what in turn will

	highlight their sense of responsibility for the final outcome.
Participation in results mainstreaming	After testing and evaluation phase, the final products will be implemented in all the companies of selected sectors and constantly used through social partners' agreement concerning created model system of knowledge management (through for ex. Sectoral Collective Work Agreements).

After the completion of Project realization each of participating companies will be able to independently implement elaborated system and use it on regular bases as a part of own knowledge management system.

Active company inclusion in planning, realization and takes evaluation contribute to identification with Project idea, strengthening of the idea of co-authorship and will make the system more efficient in the future. Both company management and employees, through individual professional development plans, will consciously aim to use implemented model, which will help them in preserving existing work places. The last is particularly important for the group of worker of +45.

SENSITIZATION AND KNOWLEDGE MANAGEMENT BARRIERS

In the framework of Project realization Partnership prepared two analyses:

- 1) *Analyses of barriers and obstacles in knowledge management in the area of human resources management.*
- 2) *Justification of choice and analyses of sector of Project concern.*

Thanks to above mentioned analyses Partnership realizing established goals was conscious of major barriers and obstacles which appear in the area of knowledge management in companies. This knowledge appeared to be a key one on every stage of Project realization, including realization of activities aiming at sensitization of participating sides to life long learning.

Barriers and obstacles in knowledge management – summary.

Level	Type of barrier	Identified barriers
Employee level	Psychological	<ul style="list-style-type: none"> - Natural fear against change - Protection of own interest and position and fear against passing experiences one sided way. - Unwillingness to carry out additional work. - Limited needs of Professional development and self-excellence. - Lack of initiative. - Inability to independently acquire knowledge and its evaluation. - Inability or/and fear to share own observations - Fear to make mistakes and its consequences - Inability to accept critics and to constructively criticise - Inability to ask for advice and help.
	Technical	<ul style="list-style-type: none"> - Inability to use new technologies. - Incomprehensible knowledge codification and wide interpretation - Overloading - Difficult access to newest R&D results.
	Financial	<ul style="list-style-type: none"> - lack of opportunity to rise service costs connected to the access and acquisition of new competences
Company level	social	<ul style="list-style-type: none"> - low consciousness concerning advantages from knowledge management - little engagement form management side in implementation and monitoring of knowledge management. - Lack of leader. - Fear against investment in employee who may go away - national and cultural differences - inability to co-operate in the group

	Organizational	<ul style="list-style-type: none"> - lack of clearly elaborated strategy. - Lack of coordination with the area of human resources management area. - Wrong information circulation. - Expanded hierarchical structure - Lack of new knowledge in the company - Disintegration of stuff - Unfavourable organizational culture. - Going away by experienced workers to pre-retirement. - Fear against information leak from the company
	Technical	<ul style="list-style-type: none"> - architecture. - distance. - Disintegrated technical architecture - Lack of information store system - Lack of possibilities of replacement on the period of training
	Financial	<ul style="list-style-type: none"> - Limitation of the opportunity to rise expenditures to implementation of knowledge management concept - Inadequate priorities leading to make savings in the area of trainings and qualifications.
Sector and economy level	Social	<ul style="list-style-type: none"> - inability to co-operate and associate by the companies. - Unwillingness to share achievements and experiences
	Technical and systemic	<ul style="list-style-type: none"> - Deficiency of knowledge management specialists. - Lack of highly specialized and flexible trainings - Mismatch of education system to economy needs, inertia of education system. - Lack of contact with scientific and research - Lack of unified system of qualification recognition acquired outsider formal education system
	Legal	<ul style="list-style-type: none"> - Faulty protection of intellectual property rights - Law changeability
	Financial	<ul style="list-style-type: none"> - Science and research programmers underinvestment - Worse working conditions

Having in mind sensitization of companies to life long learning, enumerated barriers in knowledge management need to be taken seriously.

Partnership acknowledged that model system as a new element in the field of knowledge management can be met with resistance from the side of entrepreneurs and

employees. Therefore a special attention was focused on designing the system so as to fulfil below criteria:

- Simple and not complicated– entrepreneurs will be able without difficulty to understand the system idea and its strong and weak sides.
- Flexible – it can be adjusted to the specific context of particular companies
- Cheap and time efficient – so that entrepreneurs will decide to implement it and to dedicate amount of time to it
- Stable in the long term– so that introduction of new elements and changes is not needful
- Bringing clear, measurable benefits– so entrepreneurs who decided to implement this system, decided also to continue it after the end of Project realization and so other entrepreneurs will feel encouraged to implement such system in their companies.

Not meeting one of the above criteria may result in failure of the whole Project and bring low efficiency in practice.

For this reason, in the Project results mainstreaming and sensitization of companies, it is important to pay attention also to the so called soft results of implemented model system of knowledge management:

- Better human resources adjustment to company needs
- Rise of trust between employer and employee
- Support in attaining company strategic and operational goals through defining training needs and its realization
- Rise of training culture in companies
- Rise of employees safety concerning workplaces

Accomplishment of above mentioned soft results generally contributes to Better situation of company on the market or its development. Both, rise of trust between employee and employer and rise of training culture in companies, contribute to the increase of competitiveness of companies and to rise of staff security and their motivation.

SENSITIZATION OF COMPANIES - INNOVATION

Implementation of organizational and process innovations, similarly to technological ones contribute to production cost reduction, rising of products and services quality, rising of influences, market expansion, etc. Company innovative potential decides in large extent about company's market position and economical efficiency. Polish companies start to realize this and consequently pay more attention to the solutions which at low costs may raise competitiveness. The creation of education systems friendly to innovations and focused on building competitive position on the market becomes desired necessity. Model system elaborated by Partnership PL-106 ideally meets these needs.

Therefore, in the framework of Project results mainstreaming and in the process of sensitization of companies to life long learning, partners highlight innovation of proposed resolutions. This encourages companies to acquaint with the Project and to rethink the system of further education and the influence of proper knowledge management to company's market position.

Innovation description of Project PL-106

Innovation	Current situation	Expected results
System of training needs analyses in company (national innovation directed towards process)	In the current situation in Poland there are cases of using training needs analyses, but in not systemic form using some system tools; seldom in SMEs	System implementation in companies will enable to effectively use the whole set of tools in order to create tailor made concept of trainings for the company's needs.
System of qualifications acquired through non-formal and incidental trainings (European innovation directed towards context and process)	In the current situation in Poland there isn't systematic procedure of recognition of qualifications acquired through non-formal and incidental trainings. There are single, internal cases.	System implementation in companies will enable to put in order and to systematically measure acquired qualifications in company.
System of use of elderly workers to transfer their knowledge to other co-workers (European innovation directed towards context and process)	In the current situation in Poland except for draft system, there is no systemic procedure of using elderly workers (after training) to transfer their knowledge to other. It can be carried out non-formally (within incidental training), but it a non formalised process, not written in the system of knowledge management in company.	System implementation in companies will enable to effective, systematically use of often discriminated group of elderly workers to transfer their knowledge and experiences within non-formal and incidental trainings in the company.
System of knowledge management in company connects three subsystems (European innovation directed towards process)	In the current situation in particular EU members, there are cases of systemic forms of procedures concerning mentioned subsystems, but they are not connected in one, formalized knowledge management system.	Implementation of complex knowledge management system in the company will enable to efficiently and systematically manage the knowledge in SMEs not only on national but also at European level.

SENSITIZATION – EQUAL OPPORTUNITY POLICY

Next to such goals as sensitization of companies, Partnerships highlights also other assumptions, such as opportunity equality.

Approaching to equal opportunity by PL-106

Goal of Partnership within the Policy of equal opportunity	Current situation and planned activities	Assumed result
Levelling the opportunities of men and women on labour market through individual development plans – career paths.	Studies on employee equality in Polish companies point out that there is considerable discrepancy between the level of women and men wages that have comparable qualifications and job position. Quantity data point out gender discrimination mechanisms. It is more difficult for women to get promoted above certain level despite of the fact that they have often managerial qualifications and predispositions better than men.	Project success will have influence on levelling opportunities of men and women on labour market thanks to creation of individual development plans-career paths. These plans will be a formal base for periodic evaluation of worker and will to considerable extent eliminate the problem of bias in promotions and salary rise. Rise of security and trust to employers. Limitation of stress, elimination of conflict and strains risk in the surrounding.
Overcoming of psychological barriers	Currently an important factor that is source of problems on labour market is insufficient consciousness concerning the necessity to further professional training among workers and unwillingness to change qualifications. Project's goal is to make the employees conscious of the need to develop. Designing of individual career paths on the workplace will facilitate the whole process in respect to all employers regardless their age and gender.	Ability to independently elaborate educational Project on workplaces in the company. Company cost limitation – labour cost of persons that advise on professional development and create development profile of employees.

SENSITISATION AND ACTION 3 OF CI EQUAL

Action 3 of CI EQUAL concentrates on mainstreaming and policy implementation of the Project's results.

Mainstreaming is understood as process of informing on Project results at seminars, workshops, conferences, study visits, with the use of elaborated within the Project reports and other key documents. Consequently it contributes to sensitisation of all stakeholders, including employers on current labour market challenges. One of them is the issue of life long learning, which forms a backbone of Project PL-106.

Within the framework of Action 3 Partnership PL-106 planned following activities:

- Consultation meeting with Structural Funds Department in Voivodship Office and Marshal Office from voivodship.: Mazowieckie, Lodzkie, Kujawsko-Pomorskie, Slaskie, Pomorskie
- Consultation meetings with craft organizations supervising draft examination boards in voivodships: Mazowieckie, Lodzkie, Kujawsko-Pomorskie, Slaskie, Pomorskie
- Consultation meetings with regional social partners organisations in voivodships: Mazowieckie, Lodzkie, Slaskie, Kujawsko-Pomorskie, Pomorskie
- Consultation meetings with Association of Centres for Vocational Development
- Consultation Meeting with National Labour Inspectorate
- Consultation meeting with Polish Federation of Engineering Associations
- Meeting with teams of Tripartite Commission for Social and Economic Affairs
- Meeting with representatives of the Ministry of Labour and Parliament Committee for Labour Code
- Meeting with representatives of Education Ministry
- Elaboration of act of law amendments
- Edition of guidebook „Internal Coaching”
- Edition of guidebook „Identification of barriers and obstacles in knowledge management in Light and chemical sector”
- Publication of brochure concerning the system of Professional qualification recognition.

**MAIN RESULTS OF DP PL-106
PERTAINING TO
SENSITISATION OF ENTERPRISES
ABOUT LIFE LONG LEARNING**

ASSUMPTIONS TO SYSTEM No 1

MAIN PROCEDURES OF SYSTEM No 1

ASSUMPTIONS TO SYSTEM No 3



INICJATYWA WSPÓLNOTOWA EQUAL

Modelowy system przystosowania kadr przedsiębiorstw do zmian strukturalnych w gospodarce

*Projekt realizowany przy udziale środków Europejskiego Funduszu Społecznego
w ramach Inicjatywy Wspólnotowej EQUAL
nr PL 106*



SYSTEM No 1 „COMPETENCE NEEDS ANALYSIS IN SMEs”

**(within the Project:
„Model system of SME’s staff adaptation to
structural changes in Economy”)**

GDAŃSK, January 2006

INTRODUCTION

The XXI century characterises the rapid technological, cultural and social changes. Companies have to struggle a lot of problems: rapid changes in companies environment, the growth of competitiveness, changes of customers' tastes, etc. These all force changes within companies organization, which ones to endure have to adapt to changing reality and even to outstrip these changes. Therefore the success of the organization depends on the skill to create a dynamic organization, which is capable to adapt to continuously changing environment on the market. Such organization should be flexible, creative, capable to achieve and practical use of the knowledge.

Companies have to learn how to use the knowledge of individual employees, the knowledge of organization and the external knowledge from the environment. Companies should be able to identify possessed resource of knowledge, to create the new one and first of all to share this knowledge and use it once again. To allow this organizations have to manage the knowledge as well as other companies resources (people, capital).

The knowledge management should be an integrated system which embraces the whole company.

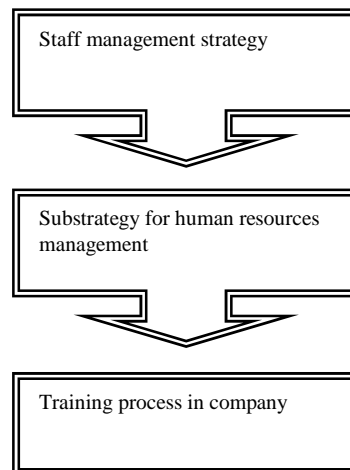
The system of knowledge management vs. trainings

The important element of the system of knowledge management is the process to acquire the knowledge which is necessary to realise the companies' goals. This knowledge may be gained in different ways, for example by hiring an expert in special area, but also giving hired employees the necessary competencies by the means of trainings.

Training process in a company

The authors of the EQUAL project presume that the main objective of companies' staff training is the sustainable development of elements of working potential of individual employees or groups of employees, aiming their adoption to anticipated changes in the organization (company) and the environment. If this objective should be realised the training cannot be organized in accident, not organized way. The trainings system has to be planned and long-termed to allow the company to realize strategic, long-term objectives. Thus the trainings should follow from the sub-strategy of human resources development, this one form the personnel strategy and this form the companies strategy.

Drawing 1. Dependence of the training process from the companies' strategy



According to this the training process to be successful should be complex and have to contain four main phases:

- 1) training needs analysis
- 2) creation of “tailor-made” training concept
- 3) training realisation
- 4) control of training effectiveness (the transfer of acquired knowledge into working places)

The general assumptions of the system:

- 1) The company staff has to be trained successfully to maintain happened and anticipated changes.
- 2) The main objective of staff training is the sustainable competencies development of individual employees or defined groups of employees.
- 3) The system has to support the organization in realization of scheduled objectives.
- 4) The training should be the sustained process.
- 5) It should be planned and long-termed activity, it should maintain the proper people in the proper place and time.
- 6) The system has to be complex and therefore should embrace four phases: training needs identification, creation of “tailor-made” training concept, training realization and the system control.
- 7) Each phase requires proper techniques (diagnostic, analytic, project and control) to be used.
- 8) Person (responsible in a company for the training process – the system: (1) procedure of competence needs analysis; (2) procedure to create the “tailor-made” training concept; (3) procedure to transfer acquired knowledge to a workplace) should be supported by tools (for each procedure).
- 9) These tools should be complex and at the same time should be easy to use and rather flexible to be adapted to each company.

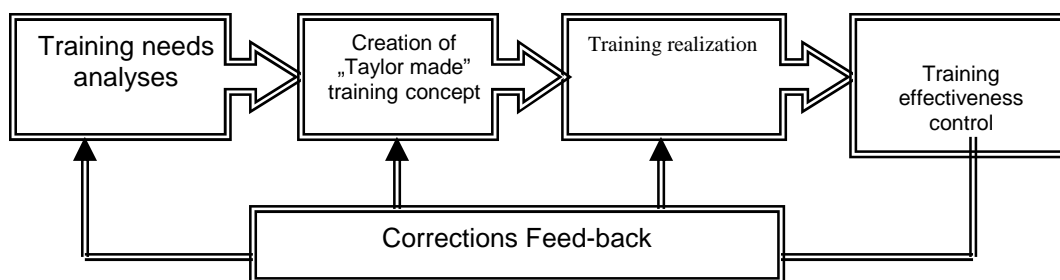
- 10) During the phase of competence needs analysis the different sources of the information about the company should be used (incl. discussions with the Board and employees).
- 11) The certain number of questionnaires, interview scenario, company analysis methods should be designed.
- 12) The important matter is that every training would be adapted to a company specification, that the training would be a “tailor-made” one.
- 13) The person who will deal with trainings in a company should possess the knowledge about training methods to be applied.
- 14) The training process should be controlled regularly and the control should be done on every phase of the training process (competencies needs analysis, creation of the “tailor-made” training concept, the training realization and the transfer of acquired knowledge to w workplace).
- 15) The control system has to content merits of realization of each task during the training process, as well as tolls (questionnaires, interview scenario etc.) used during the control process.
- 16) Conclusions of the control phase should be used to find advantages what the system brings to companies.

The implementation of described system require engagement of the whole staff of a company. To reach desired effects the complex and systematic approach is required. The system content procedures, practical examples and tools to support proper staff to design, realize and check the training process in a company.

The system is the part of the model of knowledge management in a company. The model itself has to fulfil the following conditions:

1. Building the confidence between employer and employee and therefore increasing the competitiveness of companies
2. Using the staff qualifications optimally
3. Systematisation planning and conduction of training according to companies needs
4. Controlling of trainings effectiveness – acquired knowledge transfer to working places
5. Model transparency (procedures and tools)

Drawing 2. The training process run



Identification of training needs

Aims at specifying bias between actual knowledge and competences of Employees and desired knowledge and competences. At this stage its worth to answer the following questions¹:

- 1) What knowledge and competences are needed to realize company's strategic goals?
- 2) Do the employees possess them?
- 3) Are there any discrepancies between expected performances and real ones?
- 4) Are these biases the results of lack of appropriate employee competences?
- 5) What information sources on training needs in company can be utilized?
- 6) Are proposed sources objective?
- 7) Do they deliver sufficient information?

In order to obtain more detailed and objective information on training needs, it requires complex approach. Tools that help companies at his stage are in the second part of his guidebook.

Detailed information on detailed analyses can be found in:

- Strategy and company development plans,
- Workplaces description,
- Periodical workers' evaluation,
- Workers' documentation
- Quality control, etc.

Stemming from different sources information on training needs should be analysed in detailed way, and the conclusions should be used to specify what trainings need to be guaranteed. It needs to be remembered that generally training needs overgrow capabilities of their realization. For this reason important are also the analyses as follow:

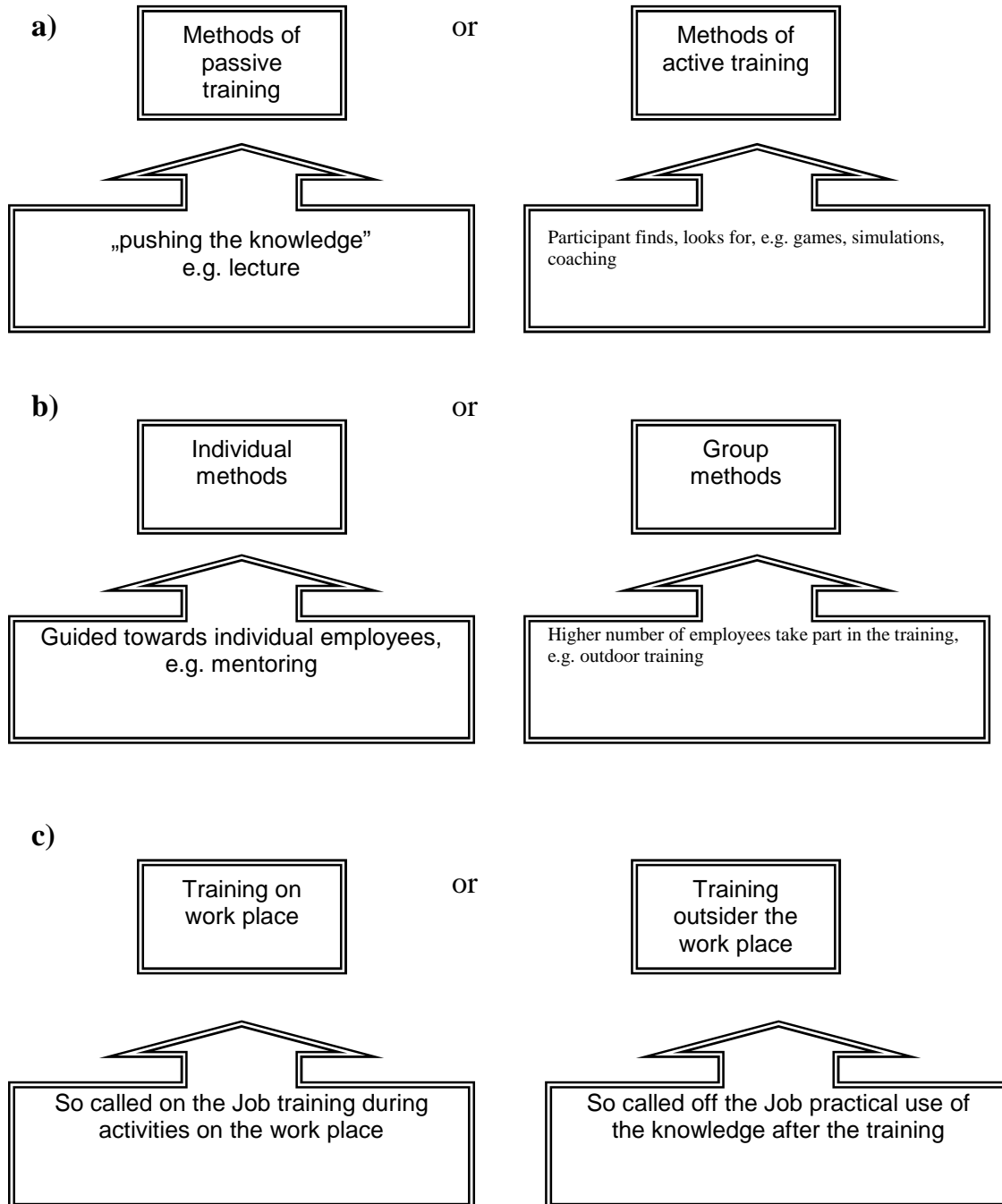
- Size of training budget,
- Size of particular training costs,
- Necessities of training,
- Availability and preparation of training

As in the effect part of training will be regarded as useless to carry out in particular period of time, part of them will be postponed, and part will be discarded.

¹ J.Litwin, op.cit., s.346

Training Design and training programme / Training realization

Training realization is based on carrying out training with the use of earlier selected methods, these can be:



Thus the trainer can choose from range of methods, which adequately selected according to participants and training content, should underpin realization of training goal. Description of different methods together with potential advantages and disadvantages facilitating choice, have been presented in other part of the Project.

Training control

Training control and training results control is very important part of the whole process, although often unappreciated. Training efficiency measure is important in recession periods.

Training control is to motivate its participants to better acquire knowledge and skills, and its trainers to better adapt training methods, so the result can be as good as possible.

Training control undergoes:

- Training programme
- Methods and ways of knowledge training
- Trainers qualification and preparation
- Training organization
- Training result, training assumption realization
- Training expenditures and their effects

The control can be carried out by:

- Training participants – as to form and way of passing knowledge and training organization
- superiors – as to the scope of training goals realization and their effects
- trainers – as to the progress of teaching
- co-workers – as to the training results
- company employees competent to assess incurred costs and to compare them with attained benefits

Summary

As described, training realization in company requires a great deal of engagement of persons in charge of trainings but also considerable financial expenditures. In order for such investment to bring expected effects, systemic and complex approach is required.



INICJATYWA WSPÓLNOTOWA EQUAL

Modelowy system przystosowania kadr przedsiębiorstw do zmian strukturalnych w gospodarce

*Projekt realizowany przy udziale środków Europejskiego Funduszu Społecznego
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nr PL 106*



SYSTEM No 1 **„COMPETENCES NEEDS ANALYSES IN SMES”**

PROCEDURES

**(within the Project:
„Model system of SME’s staff adaptation to
structural changes in Economy”)**

GDANSK, January 2006

PROCEDURES OF SYSTEM No 1

**IMPORTANT IN THE CONTEXT OF SENSITIZATION OF
COMPANIES ABOUT LIFE LONG LEARNING**

TRAINING NEEDS ANALYSES PROCEDURE

'TAILOR MADE' TRAINING CONCEPT PROCEDURE

CONTROL OF TRAINING EFFECTIVENESS PROCEDURE

TRAINING NEEDS ANALYSES PROCEDURE

Procedure to elaborate training needs analyses

The system fulfils 4 basic conditions:

1. Builds trust between employer and employee and rises company competitiveness
2. Optimally uses staff qualifications
3. System planning and conduction of trainings in accordance to company needs.
4. Controls effectiveness of conducted trainings – of achieved knowledge to workplaces.

Procedure of competence needs analysis (8 steps)

- 1 Step The management defines companies position. The target is to gather general information regarding the current in-house situation. The procedure to create the company strategy (definition of strategic objectives) may be used – attached to the system
(Tools used to fulfil the step – each step is attributed with proper tool / tools)
Tool no. 1: Questionnaire I – Strategic and operational targets analysis (procedure to define strategic and operation objectives)
Tool no. 2: Questionnaire II – Definition of requirements toward competence needs analysis
- 2 Step Definition of companies problems and strategic objectives.
Tool no. 3: Questionnaire III – Definition of objectives concerning HRD
Tool no. 4: Questionnaire IV – Momentary situation in-house concerning HRD
- 3 Step Data analysis to conduct the procedure of problems analysis (definition of specific companies code numbers)
- 4 Step Data analysis to create necessary trainings and actual levels of competences (main work processes, elementary professional competences, objectives of training programs)

- 5 Step Interview with employees to recognize actual level of competences, competences needs as well as problems and hinders during working process
Tool no. 5: Questionnaire V - Form to register actual level of competences
- 6 Step Data analysis to recognize actual level of competences, competences needs, problems and hinders during working process as well as competence requirements on working places
Tool no. 6: Questionnaire VI - Form to register further competence requirements needed on the working place
- 7 Step Training (competence) needs analysis
Tool no. 7: Questionnaire VII – How to conduct an interview with employees (Questionnaires VII/1 – Workplace card and VII/2 – Employees development matrix)
- 8 Step Definition of further competences needs comparing the actual level of competences with required level defined
Tool no. 7: Questionnaire VII – How to conduct an interview with employees (Questionnaires VII/3 – Collective matrix of staff development)
Tool no. 8: Questionnaire VIII – Form to recognize further trainings needs

PROCEDURE TO CREATE THE „TAILOR-MADE’ TRAINING CONCEPT

What must the procedure determine?

- Methods to be used for the analysis of professional competence needs
- The target group
- Learning objectives
- Subject matter
- Methods for learning and teaching
- Technical equipment: media, learning aids, learning material
- Taking into consideration the release of employees for training when planning the seminar
- Organizational conditions: room, time, length, required training personnel
- Qualification prerequisites for participants
- Methods for controlling learning success
- Trainers qualifications
- Costs

The results of the competence needs analysis are the basis for concept development, which also takes into consideration the financial and organizational standards of the company. Customized concepts comprise on-the-job forms of learning, task- and activity-oriented learning concepts or self-learning concepts, co-operation with various training companies and centres for securing the best offer and creation of a good learning and working atmosphere.

Procedure to develop the “tailor-made” training concept (8 steps)

- 1 Step: general analysis of training needs, i.e. problems and objectives definition together with the companies management. Task-oriented approach, i.e a learning task is a working task
- 2 Step: discussion of company strategy and objectives with companies management to define the training concept (training localization). Selection of members of the team to elaborate the training concept
- 3 Step: detailed analysis of task performance done together with future training attendant of the training program. Revision of problem and training objectives definition
- 4 Step: prepare of training program – training concept team prepares training programs Tool IX: „Tailor-made” training program offer
Tool X: The form to define relations “price – different alternatives of training programs”
- 5 Step: prepare of detailed plan of the training – training concept team defines the training localisation for each individual working task
- 6 Step: Prepare of training materials for trainers
- 7 Step: Discussion between training attendants and trainer on training methodology
- 8 Step: adaptation of training program to actual training needs

Companies goals and training programs

The presented examples make clear that differentiated training programs are necessary for realising different companies goals.

In the following a systematic comparison is to be drawn between companies goals and suitable training programs:

Company goal: General orientation on specialized innovations and tendencies

Possible training programs:

- Sending one or several employees to lectures, presentations or external seminars
- Organizing visits to fairs and exhibitions
- Procuring specialised literature and other materials to be worked on by one or several employees
- Passing on the knowledge acquiring in in-house workshops, lectures, leaflets etc.

- Organizing exchange programs for employees with partner companies (i.e. in foreign countries)
 - Promoting the training activities of employees in their free time
- Company goal: Adapting the qualifications of employees to the technical and organizational innovations they are confronted with*

Possible training programs:

- Utilising the producer's induction course
- Buying or borrowing learning materials for studies
- Supporting studies through in-house experts or external experts
- Setting up a place of learning
- Setting up a place for group learning
- Paying external training suppliers or free-lance trainers etc. for a seminar
- Sending one or several employees to an external training program for trainers who are then enabled to carry out in-house seminars

Company goal: Improvement of specific companies code numbers

For example:

1. Code number „yield of the training ”

$$Y = \frac{C}{T} \times 100\%,$$

Y – yield of the training

C – the difference resulting from the comparison of company income before and after the training

T – training cost

2. Code number „sales contracted”

$$C = \frac{T}{S} \times 100\%,$$

C – contracts

T – training cost

S – estimated amount of sale

3. Code number „product output”

$$M = \frac{T}{P} \times 100\%,$$

M – increase in product output

T – training cost

P – product piece rate

4. Code number ”time length of processing”

$$M = \frac{T}{L} \times 100\%,$$

M – amount of work time saved

T – training cost

L – labour cost

The following types of training are especially suited to realize the goal:

- Establishing groups to test the quality
- Carrying out workshops for improving the motivation of employees and the co-operation between departments

Above mentioned trainings also can be implemented

Company goal: Organizational development

Learning processes affect not only the individual employee but the whole company. Learning processes exist as a controlled interactive relationship between company innovations and the individual learning processes of particular employees: The knowledge and skills they possess are adapted to the changes in company requirements.

What kind of changes in company requirements are meant? New demands such as changing over to JIT (just-in-time deliveries) is one example. Other examples are: radical changes in technology, the necessity to sink costs, a lack of co-operation between departments and hostility towards innovative structures

Possible training programs:

- The expert opinion of a consultant on the basis of observation and interviews on topics such as: problems in the work process, affected employees, consequences for companies goals
- Moderated workshops in which all person affected participate for better understanding the diagnosed problem and for clarifying the role of each department and employee
- Workshops and tests for drawing up modification concepts of organization structure

Comparison between actual and demanded trainer profiles

The quality of a training program is largely determined by the quality of the trainers. One of the central tasks of developing a concept is therefore defining the demand for qualifications and competencies which are placed on the trainer or teacher.

Comparing, verifying and securing accordance between the profile demands (which result from the training objectives) and the actual profile of the trainer makes sure that the program carried out is of high quality.

Widespread acceptance of the trainer on the side of the participants shall be achieved by employing a trainer whose skills and personal qualities meet the demands of the program.

One criterion for verifying the trainer's qualification is his work experience – on the one hand his experience in adult education and, on the other hand, his experience with the thematic area at hand. When checking trainers' qualifications questions on the following topics can be useful:

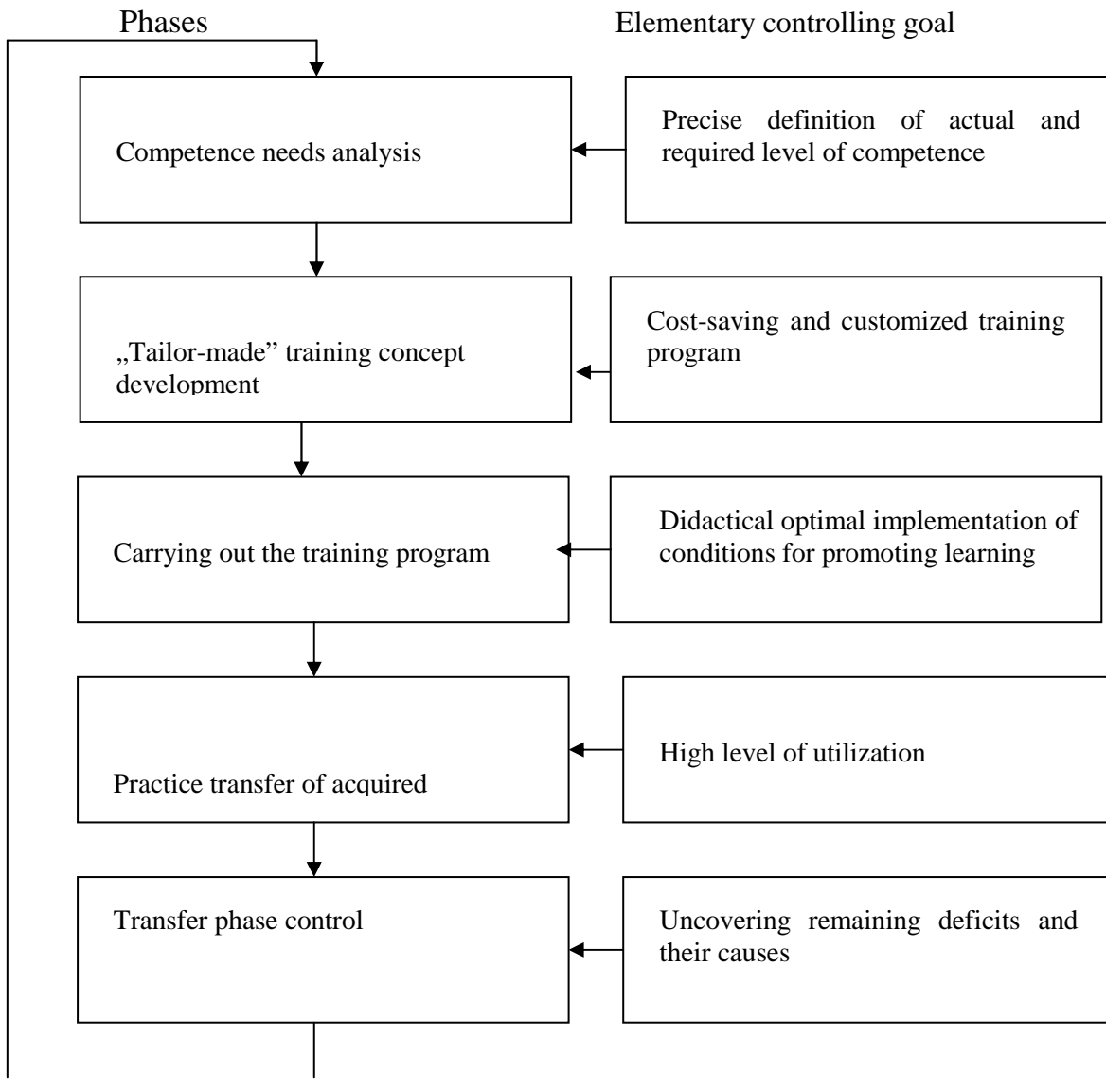
- Vocational education and certification
- Work experience, especially regarding content and length
- Pedagogical education
- Teaching experience, especially in adult education
- Participation in specialized and/or pedagogical training programs

In addition the company can get information on the trainer from other companies by asking for references. An especially effective method for evaluating trainers is a demonstration lesson. Also, if the trainer is to be employed for a longer period of time the company should ask to audit a lesson.

Tool XI: Observation sheet trainer evaluation

PROCEDURE OF CONTROL OF ACQUIRED KNOWLEDGE TRANSFER TO WORKPLACES

Training process controlling



How can results be evaluated and documented?

An immediate evaluation of the training program can be carried out by implementing questionnaires for participants and by evaluating trainer performance.

Participants evaluate the program according to the following criteria:

- Preparation
- Subject matter
- Trainers
- Teaching materials and methods
- Organization
- Participants evaluation and self-evaluation
- Putting learned subject matter into practice

Immediate evaluation is ideally embedded in a monitoring system – getting the answer: How this works and what are the other possibilities.

The knowledge transfer phase

The phase of transferring what was learned to the workplace is the strategically most important phase for proving the practical value of the training program.

For companies successfully completing training is only the means for achieving the objective of positive changes in work behaviour. This phase proves whether or not success in learning has been transposed into success at work and this shows, too, whether or not the training program has fulfilled its goals of contributing to the realisation of companies strategies.

Training program control during the phase of knowledge transfer means process guidance and process control, i.e.:

- Determining whether or not success in learning has led to success in working
- Supporting the transfer process

The assessment of the transfer phase is normally carried out twice after training has been completed: the first time after 4-6 weeks and again 6-12 weeks after the program has ended.

The four-stage transference model is based on two staff discussions which take place within a minimal time length of 6 months:

1 stage: Discussion after completion of the program.

2 stage: First evaluation of the knowledge transfer after 4 – 8 weeks.

3 stage: Second evaluation of the knowledge transfer after 6 – 12 weeks.

4 stage: Final analysis and evaluation of the training program.

Used tools:

Tool XII – The interview with participants before the training

Tool XIII – The interview with participants during the training

Tool XIV – The interview with participants after the training (up to 4 weeks after training)

Tool XV - Questionnaire to conduct an interview with participants in the matter of acquired knowledge transferring (4-8 weeks after training – done by company's system consultant)

Tool XVI - Questionnaire to conduct an interview with participants in the matter of acquired knowledge transferring (6-12 weeks after training – done by company's system consultant)

Tool XVII – Questionnaire to conduct interviews with participants in order to define the level of transferred knowledge to a working place (appr. 6 months after training)



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ASSUMPTIONS TO SYSTEM No 3

**“USING ELDER, WELL EXPERIENCED WORKERS
IN PASSING THE KNOWLEDGE INSIDE THE
COMPANY”**

(according to Project:
“Model system of staff adaptation in the company to
structural changes in economy”)

Warszawa – Gdansk, December 2006

Introduction

Highly qualified employees are the essential element of each enterprise.

The more staff the enterprise employs, the more diversity as far as education and qualification level is concerned appears while participating in different phases of the enterprise economic activity. As a rule entrepreneurs are interested in employing highly qualified persons capable to execute given tasks in efficient and competent manner.

However, it is not always possible because either workers' qualifications do not comply with specific employer's expectations or gaining them is too expensive for the employer. In this case the importance and the role of experienced workers who have gone through different posts during their work process and were shaping their qualifications and competences under unlike technological conditions, considerably grows. Worker's engagement in different aspects of production process is to some extent a path of vocational training, which leads to generating a group of workers that possess extensive professional experience and qualifications enabling to cope with solving diverse problems.

Obvious is the fact, that such a long professional experience have workers with long-term work experience. Predominantly these are persons in pre-retirement age.

Their excellent professional knowledge and skills are an important value added for the enterprise. On the other hand age and physical fitness the high quality of their work is not balanced with lesser amount of produced items.

Work relation of these persons is protected by the law. Therefore it needs to be acknowledged that it is to the employer's advantage to focus on this group of workers in order to improve qualifications of the other workers or new workers which have shorter work experience or no experience at all.

System no 3 should enable older workers an active participation and the use of their potential in the process of market development as well as in the realization of the goals set by European Employment Strategy. Recommendations for Poland derive from the Strategy point out, among others, improvement of workers and companies adaptability possibilities and more efficient opportunities to invest in human capital and life long learning. It will be possible thanks to the use of the competences of experienced workers in supporting education and training of younger colleagues.

Definitions:

Assumptions - analysis: "Assumptions to the System nr 3" elaborated by Towarzystwo Naukowe Organizacji i Kierownictwa (Scientific Society for Organization and Management) and Związek Rzemiosła Polskiego (Polish Craftsmen Association).

Project - "Model system of staff adaptation in the company to structural changes in economy"

System nr 3 – “Using experienced workers in passing knowledge and skills to the younger co-workers (newcomers)”

System nr 2 – “Estimation of qualifications achieved in non-formal education” according to “Model system of staff adaptation in the company to structural changes in economy”

System nr 1 – System nr 1: “Competence needs analysis“ according to “Model system of staff adaptation in the company to structural changes in economy”
(knowledge management in the company)

Competence – knowledge, skills and experience of a worker which allows him to perform work process in effective and smooth way and solving the problems which can appear during the work

Formal Education – educational system based on typical way of learning (like: classes, marks, schools, programs and handbooks), which is carried out on different levels (from basic knowledge to higher education) and refers to general and vocational education

Informal Education - a life span, not organized and unsystematic process of achieving by every human being different types of information, skills, attitudes and beliefs based on everyday experience and influence of surrounding environment

Non-formal Education – intentional and organized learning out of formal educational system which allows to achieve goals of education

Worker-coach-senior – this is the title which is given to the workers with long-term practice, who is at least 50 years of age; fulfilled the System nr 3 expectations; took a place in an appropriate training according to the System 3; took part in consultancy process, training, coaching, supervision and vocational trainings.

Apprentice – worker who’s improving his vocational training (newcomer) and is supported by worker-coach-senior.

Staff Representative – workers of the company who are duly authorized by trade unions or staff to protect their interests.

Vocational preparation for Worker-Coach-Senior- type of non-formal education organized by employer or the other body that assigns the performance of a task, containing lessons and topics which use different types and methods of teaching.

In-house vocational training – training (organized by employer) which takes part inside the company and applies to selected workplaces carried on by worker-coach-senior

Vocational training fund – money which is given by the employer for the vocational trainings and vocational improvement of the workers; this found could be co-finance by other sources. The vocational found is optional and is passed by a law.

The goal of the study

The goal of this study is to create the system which is using the experienced workers with long-term practice to:

- a) passing their own experience and skills to younger co-workers (apprentices)
- b) selecting worker-coach-senior in the company

- c) using the worker-coach-seniors with long-term practice (experience achieved during non-formal and informal education) in process of vocational improving and estimating qualifications of younger workers; this process allows on more effective way of using qualifications of workers

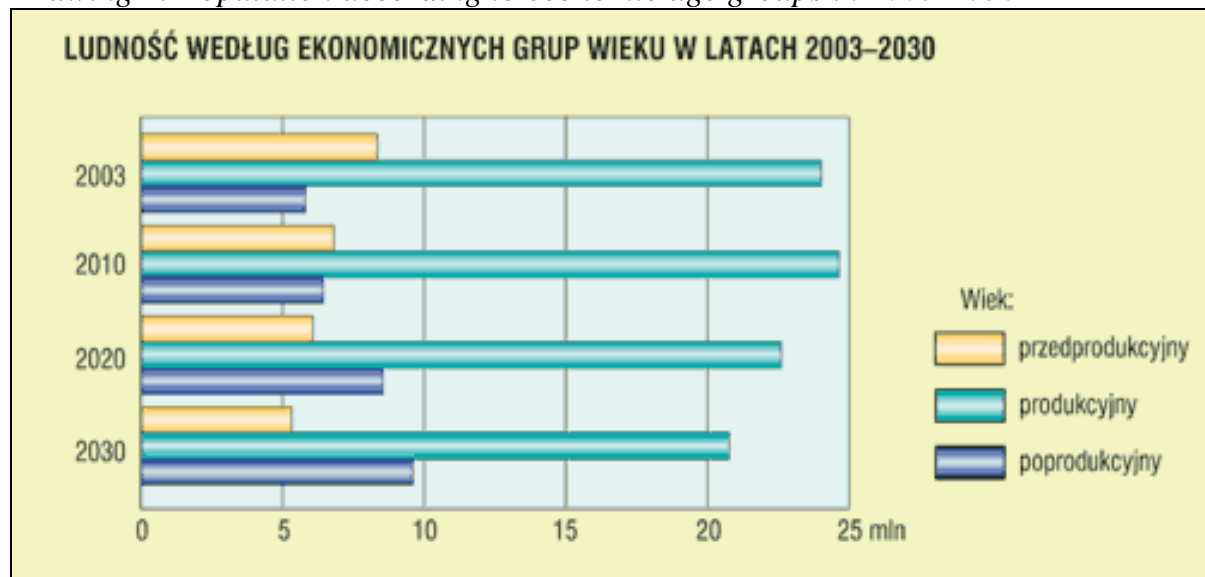
The study should help to optimally design the System, implement procedures of the System and give right tools of each step of procedures.

Reasoning for the assumptions of designer System

Situation of employees at the age of 50+ on the labour market / Socio-economic conditioning

Problem of society ageing concerns not only highly developed countries but starts also to be an observable tendency in Poland. Demographic survey by Central Statistical Office (GUS) indicates that number of population in the production age will be increasing only up to year 2010, while the number of population in the post-production age, both men and women, will be systematically increasing in the following years.

Drawing 1: Population according to economic age groups in 2003-2030

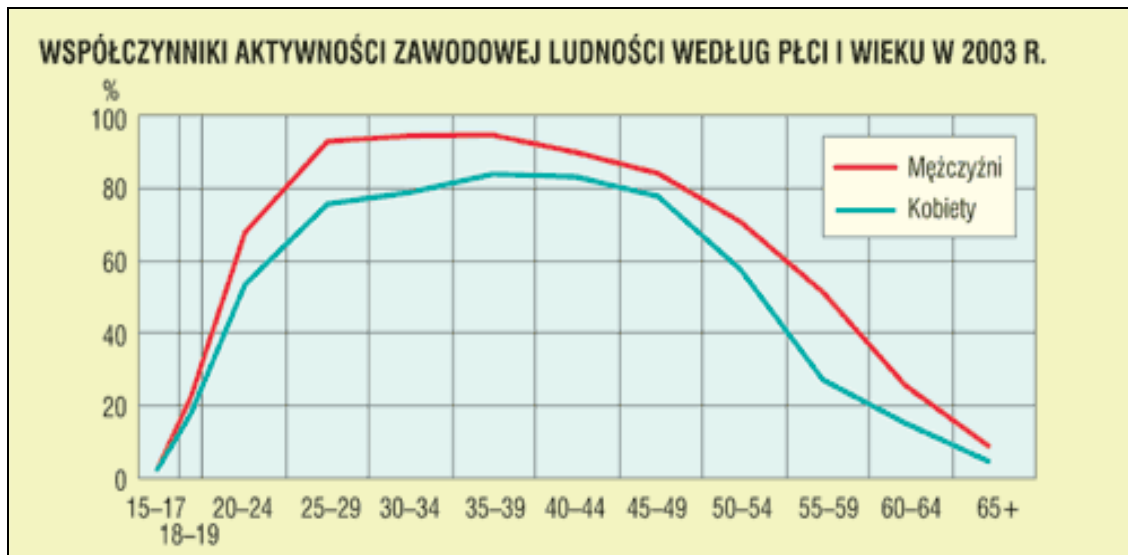


Source: GUS² □ pre-working age □ working age □ post-working age

Statistics indicate also that professional activity factors start to fall down in the group of persons +45 years old. In the age of +50 years old this process is even more intensified (Drawing 2)

Drawing 2: Professional activity rates according to sex and age – in 2003

² GUS – Central Statistical Office, Poland



Source: GUS

----- men

----- women

Indicator of employment in Poland between 55-64 years is one of the lowest in Europe. In year 2004 the indicator for Poland was - 26 %, while the average for the EU was - 40%, and for USA - 60% (Eurostat and MGIP³). In this analysis the specific context of Polish family bounds needs to be taken into account. In case of women an essential element inducing them to stop professional activity is their wish to look after grandchildren and help in households, what is less popular in the highly developed countries.

Persons +50, registered as unemployed, made up in 2005 and first half of 2006 16,2% of total number of registered unemployed. It needs to be highlighted that, although unemployment decreases, unemployment among older workers rises.

Undoubtedly, this is a result of certain objective constraints that concern considerable number of +50 employees what plays a role in decreasing their attractiveness for employers.

The level of formal education of older workers is lower in comparison with younger – particularly regarding such competences as computer literacy, knowledge of foreign languages, etc. An important issue is also discrepancy between vocational qualifications of older persons and market needs. These persons often completed their education and gained professional experience in the sectors which became obsolete or gone through enormous technological and organizational changeovers. In many cases observable is also the influence of health condition of older persons which constrains their ability to work at hitherto job position.

While the mentioned constraints are of natural character, the disturbing fact is that the treatment of all older workers equally regardless their individual situation what as a consequence leads to age discrimination.

³ The Ministry of Economy and Labour (former)

Age discrimination (is not restricted only to unequal treatment at the stage of job search but) takes place at the stage of employment (for example. worse access to trainings) and on the stage of job dismissal (pressure to use pre-retirement benefits and to leave enterprise)

Employers' major reluctance to employ or to prolong work contracts with older persons are negative stereotypes about this age group.

There is a wide conviction that older persons are less efficient than young ones, they work slower, are less flexible, are reluctant or do not want to learn. Number of companies prefer to invest in young people acknowledging the fact that the older workers will be in the first place the subject of employment restructuring or they will retire in the following years.

Few enterprises appreciate the benefits from employment of older workers perceiving in these resources an important element, which can support competitive advantage of the company. Older workers have wide experience which enable them to search for the solution of complex problems. Worth to point out is the loyalty towards employer, which is particularly important in the era of mass migrations as well as lesser constraints concerning family duties – for example. raising up the children.

Legal-institutional framework

State policy towards +50 workers is based on two elements: formal attempts to counteract age discrimination and social transfers.

The consequence of Poland's accession to the EU was the adjustment of Polish law to the EU requirements introduced in 1997 in the Treaty on European Union and in 2000 in the Directive on employment equality (2000/78/WE). Art. 13 of the Treaty lays down the bases to combat different signs of discrimination in all spheres of social life. Directive 2000/78/WE contains detailed articles forbidding discrimination in the area of employment, including age discrimination. Discrimination ban refers to, among others, recruitment, employment service, access to vocational trainings, promotion, employment conditions, remuneration and dismissal.

Since year 2004 Polish labour law contains articles on equal treatment of employees. According to Art. 11 Appendix 3, any discrimination, also age discrimination is unacceptable. Connected to this Article – rule of equal treatment has been contained in Art.18 Appendix 3a. Each change of situation by the employer according to age is the infringement to this rule. The Articles leave however certain „gap” for employers – they can refuse to employ a person if this is justified, for example depending on the kind of job.

The system of social transfers is major institutional factor encouraging for deactivation of persons +50. Most important, as regards state policy tools, are early retirements

(applicable to certain professional groups), pre-retirement allowances (applicable to unemployed persons) and pensions (applicable to persons disabled to work and to agricultural disabled). Annually more than 300 000-350 000 persons acquire the right to one of these services, what gives around 4 millions service recipients below retirement age. Consequently, public spending accounts for around 5,7% GNP.⁴ It needs to be highlighted that in many cases decision concerning early retirement on the ground of the fear that advantageous Articles may expire or of the fear to lose the job.

It is also worth noticing Labour Code articles that protect against dismissal the employees that have less than 4 years to reach retirement age. Although these solutions seem, at first sight, to be beneficial for employees, they bring also negative consequences. A number of employees are afraid to be forced to reduce employment costs, what will unable them to flexibly approach the issue of employment structure. As consequence they encourage elderly workers to use pre-retirements benefits. Sometimes they temporally reduce jobs occupied by persons approaching retirement age.

In January 2005 the programme „50 PLUS” was initiated. The programme is focused on the elicitation of elderly persons. The project assumes that undertaken activities within the framework of the project will contribute to Professional elicitation by around 50-80 000 elderly persons. Programme strategic goal is to strengthen employability of persons +50 while at the same time preserving indispensable social security systems in case of those in most difficult situation.

Conclusions:

The cases of using experienced employees as supervisors and mentors for newly employed took place in the past as well as take place currently, nevertheless they are not of systemic character that enables comparisons and mutual references within the branch or environment.

As analyses points out, the System which provides using the knowledge of senior workers is very necessary. The System may fill in the gap in state policy towards elderly workers and contribute to at least partial solution of numerous socio-economic problems.

Barriers and obstacles to implementation System

Decision about implementation of the System nr 3 is in employers will, so the System has to bring the benefit not only for employees but first of all for employer. Employer has to be sure that funds and efforts to implement the System are worth it, he has to be sure that System will improve the staff management and qualifications of workers. All these actions in final will bring a financial profit to the company and will improve company's management and its image.

⁴ Zatrudnienie w Polsce 2005. Raport MGiP

In-house basic barriers in implementing System nr 3:

a) on employers level

- reluctance to introduce changes which might destroy the order inside the company: proper implementation of the System nr 3 (alike System nr 1 and 2) can cause company many changes in related areas like: salary and motivation system. Chemical and light industries in Poland had come through serious changes and according to research employers and employees reveal some dissatisfaction because of those changes.

SOLUTION: benefit of implementation of System 3 must be easy to gain for the employer

- reluctance to incur expenses (like money, time, work) for implementation of the System 3 – in spite of the fact that vocational trainings for worker-coach-seniors will be supported by funds from European Union, employer also will have to incur some expenses for implementation of the System 3 – these costs usually are:

- a) selection of right person from a staff who will carry out a recruitment process to look for candidate on worker-coach-senior position cause that this person won't fulfil previous obligations
- b) interviews with selected candidates cause that candidates won't fulfil previous obligations
- c) employer's consultation with staff representative also cause he won't fulfil obligations
- d) organization vocational trainings for worker-coach-seniors
- e) assignment worker-coach-seniors to their duties in vocation improving and certification process in company's vocation improving system.

It is worth to add that in many companies very important problem is lack of money which could be used for implementation of System 3.

SOLUTION: implementation of System has to be based on minimal expenses incur by the company – especially capital expenses.

- Fear of correct and efficient implementation of the System- many of employers don't employ management specialist's, that's why employers are afraid if they will be able to do implementation by themselves without making serious mistakes and to cause management chaos in company.

SOLUTION: procedures, tools of the System and a way of implementation have to be planned in an easy way, it has to be comprehensible for people without special management knowledge.

- Fear of real effectiveness of the System – employers can be afraid that goals of the System might be illusory because in reality the System might be a source of income not for the company but for the trade unions and moreover employers are afraid that the System will keep not qualified workers.

SOLUTION: assessment of candidates must be objective and reliable it should be independent from influence of in-house employees. We should put emphasis on quality of procedures and tools of the System because it will prevent company from nonqualified worker-coach-seniors

b) on workers level

- reluctance to do another changes which might destroy collective labour agreement/force in the company – correct implementation of the System nr 3 (like System nr 1 and 2) can cause company to introduce changes in related areas like: salary and motivation system. Chemical and light industries in Poland had come through serious changes and according to research employers and employees reveal some dissatisfaction because of those changes. Additional barrier is natural fear of something new, unknown, plus this fear is being intensified by lack of constant flow of information.

SOLUTION: benefits the System nr 3 implementation has to be noticeable for employees so in there have to be constant flow of information with reference to goal, scope and stages of implementation of the System.

- fear of being responsible for new duties without extra salary – implementation of the System nr 3 shouldn't cause workers additional duties without extra salary, because it won't be motivating and involving them in activities. The same situation applies to workers-coach-seniors.

SOLUTION: additional duties connected with implementation System nr 3 must guarantee extra salary or modification of duties.

Benefits of implementation of System nr 3

Implementation of the System nr 3 in the company brings benefits for both employer and employees, especially for workers with long-term experience who belong to a group with high risk of losing employment.

a) worker-coach-seniors

- has chance to strengthen work position in pre-retirement period and moreover it gives them opportunity of longer time of employment in basic company and also in other companies from the same field.
- it gives them higher rank and prestige in the staff
- it gives them chance for higher salary

b) workers

- it gives them opportunity to participate in vocational training program and certification in the company, the plus is that workers take part in the process in friendly environment, what eases the stress and make contacts easier

- it increases effectiveness of educational process because of constant opportunities and direct contacts with supervisor of preparatory phase in certification process
- it gives opportunity to use very unique and important knowledge form worker-coach-senior

c) employer

- has opportunity to solve the problem of employees in pre-retirement period; when on the one hand these workers are less effective and less fluent in technological innovations and on the other hand they are still protected by Labour Law
- has opportunity to use his own long-term experienced workers with a very good knowledge about company and their profession - what has to bring positive effects
- system gives opportunity to cut the costs of vocational trainings what allows to involve more workers into the program and the result is more effective usage of Company Vocational Funds
- the effect of the System is higher stage of qualifications throughout the company; that is why company's benefit are improvement in production quality and competition
- has opportunity to have influence on improving qualification process by the appropriate framework of the System; right framework will give results of smother, more elastic and reduced financial costs of implementation. This fact is significant especially in the view of difficult financial situation of the companies which takes part in the project.
- the System is opportunity to build trust between employer and employees because of special way usage of workers competences who represents different level of development in their professions. It is very important especially in those companies where knowledge was passing only by long-term experienced workers to younger co-workers (apprentices) – so it is a type of informal education. In this case the implementation of System nr 3 it will improve 2 areas:
 - more effectiveness in passing the knowledge caused by increased activity of worker-coach-seniors, it uses right methods and techniques of passing the knowledge
 - better access to the information about available qualifications at the company

d) sector of the economy and the state

In the longer period of time it is easy to expect that the level of competences and competition of companies will increase in all the sector of economy, what is by the way very important development simulative factor.

Increased competition between companies, sectors and better qualifications of workers in longer period of time will have good influence on economy in global scale. Because of

better activity of older workers, government won't be overcharged by pre-retirement payments, unemployment benefits and social assistance expenses. Longer activity of older worker on the labour market can also reduce the pressure from trade unions to pay the pre-retirement payments.

Characteristic of the System nr 3

There are 9 conditions which have to be fulfilled to bring the profit for its participant (employers and employees):

- reliability – this is a principal characteristic of the System 3. System has to be based on objective assessment of qualifications candidate who want to be a worker-coach-senior. It definitely shouldn't be based only on staff will because it can lead to abuse.
- comprehensive – System nr 3 should be a supplement of System 1 and 2; its tools and procedures should be coherent.
- transparent – procedures of the System have to be transparent, clear and understandable for every participant.
- effectiveness – tools and procedures should be plan and tested under supervision of experts from Partnership to reduce mistakes in System. Testing process should prove unquestionable benefits of implementation to: employees, employer, worker-coach-senior and general for the company. (Visible effects of System 3 implementation might be hard to notice from a macro perspective – both: in sector scale and all the economy - because of short period and relatively small number of companies which take part in project).
- simplicity – preparing a professional tools used in System 3 requires extensive, interdisciplinary knowledge in Human Resources field but the tools and procedures have to be easy to use for employer and employees it should not demand special knowledge and hard work.
- flexibility – methods and procedures should be planned in flexible way to adopt it to every company in every sector
- precision – each method, specially those one which contains different kind of criteria's should be planned in that way to not allow on different interpretations.
- voluntary – taking part and functions of worker-coach-senior should be voluntary
- executing documentation – stages of implementation and system's functioning should be documented in appropriate way to prove its reliability.

Worker-coach-senior's characteristic

Worker-coach-senior will be responsible for 2 main functions in System nr 3: first is tutor and mentor who play a leading role in vocational improvement of the workers (coaching) and second function is teacher who's role is to develop a proper qualifications.

Employer can and also should use his workers with long time experience in vocational training and certification process.

Worker-coach-seniors should have employer's trust and recognition and also should be an authority among the staff because of their achievements and moral attitude. Candidates for a position of worker-coach-senior should be chosen from person of pre-retirement age.

Worker-coach-senior's knowledge, skills and experience connected with his workplace are not equal in every sector of the company and also there are clear differences among companies. That is why there is no uniform criteria's of assessing worker-coach-senior's competences.

However there is possibility to select common characteristic and predisposition which will be necessary for every worker-coach-senior no matter what is his profession and the range of qualifications.

The most important moment in System implementation will be selection of right candidates for worker-coach-seniors who will have appropriate knowledge, skills, experience, characteristic and predispositions and than training them in passing the knowledge to the apprentices. Selection of inappropriate candidates can undermine System's reliability.

Worker-coach-senior's key characteristics

- objectivity – an ability to have a distanced approach to the issues and people, without emotional relation and consideration opinions of different sides.
- patience and allowances for mistakes – it is a willingness to tolerating not serious mistakes to make a training process more effective and detailed, it also increases involvement in correction of mistakes by apprentices
- analytical abilities in searching sources of problems – ability to analyze different kind of situations and will to find a source of a problem to solve current and future difficulties
- highly developed communications skills – ability to formulate thoughts precisely and communicating them in clear and understandable way
- active hearing skills – specially valued at worker-coach-seniors it is connected with active hearing and will to précising interlocutor's opinion (charge)
- cares and willingness to help – specially valued at worker-coach-senior connected with willingness to care about others, help them and be responsible for other people
- ability to set a goals and creating plans to achieved it - ability to setting a goals and than creating the simplest plan to achieve them
- ability to consolidate authority and motivating skills – actions consistency always following with own rules and ability to motivate other people
- self-assessment – specially valued at worker-coach-senior is an optimal level of self perception, it can manifest in different kind of behaviours, it can help or hinder problematic situations

- willingness in passing the knowledge - specially unique knowledge; it is very important because workers with long-time experience don't like to share it with other, younger workers

All the characteristics of worker-coach-senior should be optimal, not in extremely high or low intensity (like; too low intensity “cares and willingness to help” characteristic can make effective cooperation impossible and in too high intensity of this characteristic can make impossible for the charges to perform work by oneself - that situation can have negative influence on improving qualification process. It is very important to plan tools and procedures have to take optimal intensity of characteristic in into account.

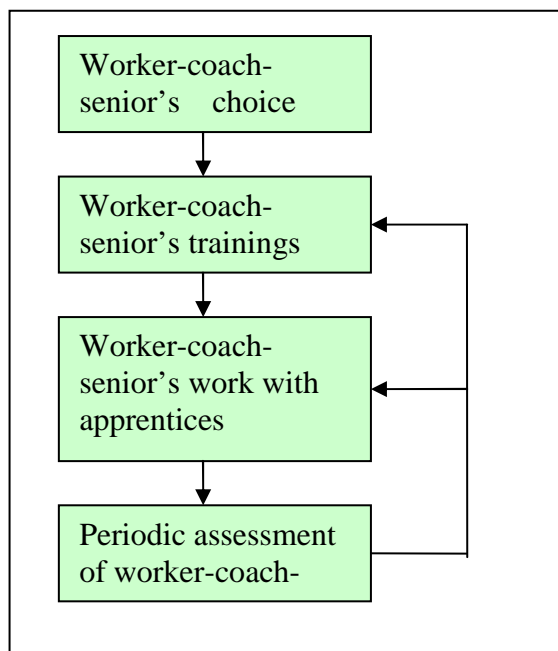
Idea of System's functioning

System's implementation

Participants of the System's implementation are:

- a) employer – who plans and implements company's system of improving qualifications, vocational advancement and certification
- b) staff (apprentices) and representative who represent the public opinion.
Attention: cooperation between employer and trade unions is significant especially in vocational advancement and certification
- c) worker-coach-seniors

The System implementation should start from informing all the employees about goals, scope, courses of implementation (right procedure) and choice of person who will be responsible for the System's implementation (right procedure and methods). In the System's implementation should take part staff and employer's representative.



Stages of System's implementation:

Proper System functioning includes 4 stages:

- worker-coach-senior's choice
- Worker-coach-senior's train the trainers and coaches
- Worker-coach-senior's work with apprentices
- Periodic assessment of worker-coach-seniors

Each stage has right procedure and tools, proper application conditioning effective System functioning.

Conduction (and participants) of in-house vocational advancement and certification with worker-coach-senior's participation:

- a) selection candidates for worker-coach-senior position (employer's part)
- b) attainment from selected candidate's an initial approval of worker-coach-senior functions (employer's part)
- c) presentation of candidates for worker-coach-seniors position to obtain staff representative opinion about candidates (employer's part)
- d) drawing up an opinion about worker-coach-senior candidates by staff representative (staff representative part)
- e) come to a common agreement about candidates – (employer's and staff representative part)
- f) to inform selected candidates about decision of delegating them for worker-coach-senior position and obtain their written consent
- g) undertaking of in-house (or external) vocational training for worker-coach-senior (employer's part)
- h) to inform worker-coach-senior about performing their particular duties in vocational advancement and certification (employer's part)

Attention: some of the steps in this process can be joined or its sequence can be changed-according to the will of employer and situation in company.

Worker-coach-senior's choice

Employer (or right body acting in accordance with employers instructions) searches for group of candidates to play a role of "worker-coach-senior". This stage includes:

1. to determine the scope of competences, where worker-coach-seniors will be needed (in economic point of view there's no need to train a worker-coach-senior in the sector where works only one person or to train worker-coach-senior in the scope of competences which won't be needed in the nearest future). System nr 1 will be very useful in this stage because it will help to analyse a trainings needs.
2. to make a list of workers who:
 - persons of at least 50 years of age – women and men who are close to reach retirement age (limit of retirement age has to be determined depending on situation in the company)
 - person who works in the company more than 3 years (in the special cases there is possibility for the departure the rules: companies which are functioning many years at the market and employs a lot of long-time experienced workers – they are able to rise a limit of retirement age; the companies who are functioning a short time at the market and do not have many experienced workers – can decline a limit of retirement age)
 - person who works in sectors in which were definite current or future trainings needs (search in System nr1)

3. to carry out review of factual competences of the workers (mentioned at 2 point) need to be done by a tool nr VII/2 [Employees Competences Development Matrix- System nr 1] and by a tool nr V [Analyses Card of Vocational Education – System nr 2]. The goal of these tools is to choose candidates for worker-coach-seniors who have specialized knowledge in the right sectors
4. review of opinions about periodic assessment of the worker-coach-seniors. Candidates for worker-coach-seniors have to do their work in compliance with the highest standards because they have to be an authority and example for younger co-workers. In 2 years time before reaching a retirement age candidates for worker-coach-seniors should have very good results at work.
5. to show a list of worker-coach-seniors candidates for staff representative to get their opinion; consultations with staff representative will have an informal character too.
Attention: in the consultation stage - employer and staff representative have to keep personal data's included in candidates Vocational Advancement Card and conversation confidential (employer and staff representative responsibility)
6. to make a conversation with a chosen candidates for worker-coach-senior, to inform them about external vocational trainings and to offer them worker-coach-senior position. The goal of this conversation is to get an initial agreement of candidates, that's why worker has to be informed about assessment procedures, financial benefits and future vocational trainings.
7. Testing coaching abilities of candidates.

Examination will take part on few stages by different tools:

- apprentices questionnaire
- co-workers questionnaire
- candidate interview questionnaire
- supervisor interview questionnaire

8. Choice of candidates according to criteria included in analysis of tools which checks candidates' abilities for the position of worker-coach-senior.

Worker-coach-senior's training

Stage of worker-coach-senior's trainings refers to right vocational preparation to their work with the younger co-workers (less experienced). The goal of this vocational training is preparation worker-coach-senior to play a leader role in in-house training and in Vocational Competence Certification Process gained in non-formal education.

Vocational training except basic knowledge will include:

- review of methods and techniques of passing the knowledge
- development of trainer, instructor, coach competences
- learning how to use designed tools during the work with apprentices

Work of worker-coach-senior with apprentices (younger co-workers)

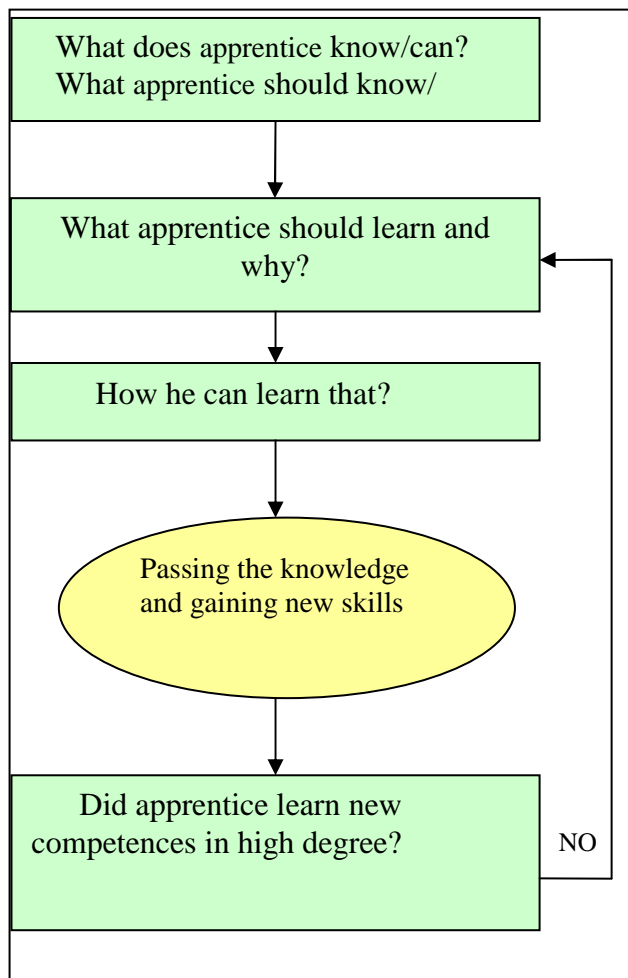
In the System's nr 3 work of worker-coach-senior with apprentices will include 2 main goals:

1. first goal is to help apprentices to learn new, particular qualifications which earlier were generated from analysis of training needs in the company (training)
2. second goal is to give an instruction and consultation for the apprentices to support their individual development (coaching), it includes 5 stages:
 - to define why there is a need of coaching and than to establish it's goals
 - to come to an agreement about particular development needs
 - to make a plan of coaching
 - realization of a task or steps (actions) formulated in the plan of coaching
 - assessment of finished tasks and planning more effective functioning

Additionally worker-coach-senior can play a role of supervisor in competence certification and also they can be members of certification committee according to System nr 2.

Training

According to the first goal work of worker-coach-senior will include:



- apprentices competence analysis based on documentation and supervisory during his work
- make apprentice aware of the need of acquire skills
- planning and agreement about competence acquire process with an apprentice
- passing an essential knowledge to a charge by explaining, demonstrations and questions etc.
- practicing with an apprentice by exercise which will allowed him to put knowledge into practice, mistakes correction and learning new skills
- assessment of progress of apprentice and if there will be a need to plan another trainings

Realization of the first goal will support following tools and procedures:

- tools to asses current level of worker's competences (tool nr VII/2 [Employees Competences Development Matrix – System nr 1], tool nr V [Analyses Card of Vocational Education – System nr 2] and additionally a note from observation of a charge during their work in practice to check mistakes and irregularities
- tool to plan an Individual Program of Achieving Competences (using a different tools from System nr 1 which allows to plan specific trainings just to fill the gap in company's functioning – tools nr VIII) it allows for worker-coach-senior to help his apprentice to specify a goals, methods and schedule of training
- procedure of informing about a need of achieving competences and consultations according to Individual Program of Achieving Competences
- tool for worker-coach-senior, apprentice and supervisor which will allow to asses training sessions and revision of achieved goals based on Individual Program of

Achieving Competences (using specific elements from tools nr XI-XIV System nr 1)

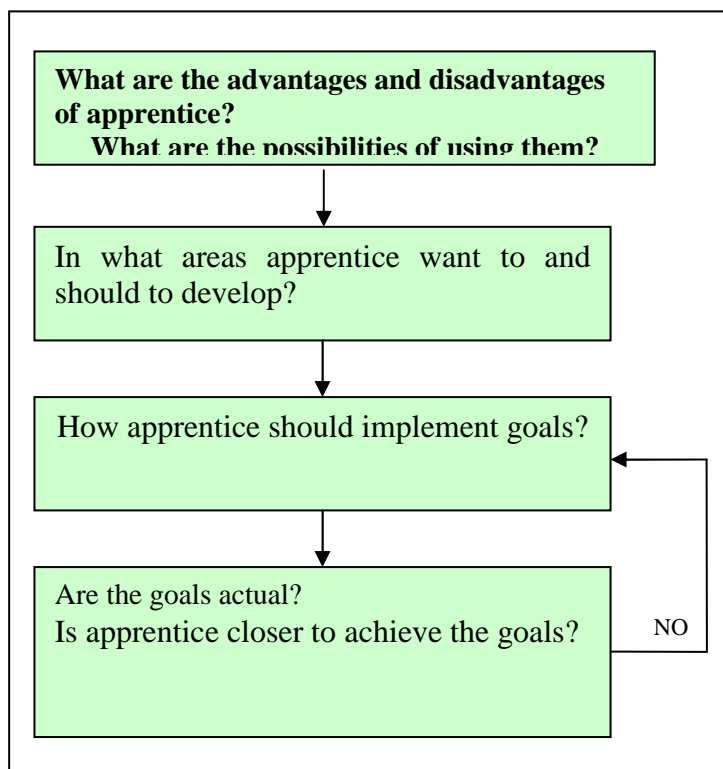
Worker-coach-senior should be lighten from the part of his previous duties because it will allow him to perform his new functions (according to goal mentioned above) more effective. But it is not good to keep away constantly worker-coach-senior from his previous work because he is excellent source of observation and information, he can still improving his competences and also he stays in close relation with co-workers and he is up to date with new technology in the company.

Instruction and consulting (coaching)

Worker-coach-seniors and apprentice meetings should contribute to:

- better knowledge about one's own and others workplaces in all the company
- improvement of relations between workers
- knowing better a trainings possibilities
- better motivation to independent carrier development
- better usage of different kind sources of knowledge in achieving competences and improving vocational qualifications

It is necessary to point out that all the areas in instruction and consulting (coaching) are able to formulate in formal frame because this is a process which main characteristic is flexibility and situational, individual relation between worker-coach-senior to apprentice.



One aspect of coaching - included in formal frame of the System nr 3 – is worker-coach-senior's assistance as a coach to plan and realization of Individual Program of Achieving Competences. Main worker-coach-senior tasks in this area are:

- to define a potential development of apprentice and recommendation possible ways of his carrier development
- settle a goals connected with carrier path chosen by apprentice
- settle a tasks leading to achieve particular goals
- periodical revision of current goals and tasks deadline

Realization of goal nr 2 will support following tools:

- tool to plan apprentice carrier path
- tool to periodical assessment of apprentice progression
- tool to assess worker-coach-senior as a person who supports planning and realization of Individual Program of Development Competences

Periodical assessment of worker-coach-senior

Work of worker-coach-senior like all the other actions in the company should undergo periodical assessment and control system. The aim of this system is to get feedback information about real effectiveness of the System, motivation, quality of worker-coach-seniors work and to get information about areas which demands improvement or apprentice.

Assessment of worker-coach-senior's work should be done on few levels:

1. self-assessment – every trainer should at least twice a year think about his work, goals which were in front of him and effectiveness of his work. Trainer should have possibility to list of situations/tasks which he thinks to be his greatest success and list of situations/tasks which demand further work and improvement.
2. assessment made by apprentices
 - information - made by charges about trainings sessions which relates to particular competences - should be classified in one questionnaire and analyzed collectively. It is recommended to make a assessment every 6 month
 - information - made by apprentices about worker-coach-senior's help in planning and implementation of Individual Plan of Development Competences - should be periodically grouped in one questionnaire and analyzed collectively. It is recommended to make assessment every year
3. assessment made by supervisors of apprentices
the real quality measuring passing the knowledge by worker-coach-senior is its proper transfer into workplace - the result of it is high quality of work and achieving goals settled in the stage of Achieving Competences Plan.

Worker-coach-senior's periodical assessment process will be supported by following tools:

- worker-coach-senior self-assessment tool
- tool which will help to group information from trainings sessions about particular competences and information given by supervisors relating to achieved trainings results by their apprentices (including tools from System nr 1, XI-XIV and XVII)
- tool which will help to group information received from apprentices about worker-coach-senior's support in planning and implementation an Individual Plan of Development Competences (including tools from System nr 1, XV and XVI)

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SCHEME OF SYSTEM NO 3

Preparatory procedure

Selection of person in charge of system implementation and optionally of members of implementation team



Worker-coach-senior selection procedure

Step1:

Selection of the commission to assess candidates' documents in the process of selection

Step2:

Determination of trainer-seniors training needs
(Tool 1)

**Training Needs Analyses
System no 1**

Step3:

Elaboration of draft candidate list (**Instruction 1**)

Step4:

Collection of declarations and establishment of trainer- senior candidate list (**Instruction 1 and Tool 2**)

Step5:

Informing workers about activities within System no (**Instruction 2**)

Step6:

Assessment of candidates for Rainer-seniors (**Tools 3, 4, 5, 6 and 7 and Instructions 3, 4 and 5**)

Step7:

Results analyses and candidates selection (**Tools no 8 and 9**)



Training procedure for worker-trainer-senior candidates

(Training programme and training materials)



Work procedures with apprentices

Step 1a:

Training
(Tool 10, Instruction

Step 1b:

Instruction-consulting
(Coaching)
(Tool 11)

**Competences Certification
System no 2**



Periodic work evaluation procedure of Trainer-senior

trainer-senior work evaluation
(Tools 12 and 13, Instruction 7)

**Training efficiency evaluation
System no 1**

**SENSITISATION OF SMEs
ABOUT
LIFE LONG LEARNING**

**THROUGH
INVOLVEMENT IN EUROPEAN SOCIAL
PARTNERS ACTIVITIES**

DP PL-106

SENSITISATION – CO-OPERATION OF EUROPEAN SOCIAL PARTNERS AND THEIR MEMBER ORGANISATIONS

EXAMPLES: JOINT ACTIONs - JOINT DOCUMENTs

EXAMPLE 1

The agreement concerning joint actions for continuous development of skills and competencies preceded by negotiations between employers and employees sides in the framework of bilateral autonomous social dialogue at EU level.

European Trade Union Confederation⁵
Union of Industrial and Employers' Confederations of Europe –
UNICE/UEAPME⁶
European Centre of Enterprises with Public Participation and
of Enterprises of General Economic Interest

« FRAMEWORK OF ACTIONS FOR THE LIFELONG DEVELOPMENT OF COMPETENCIES AND QUALIFICATIONS »⁷

I./ CHALLENGES

1. The 21st century is beginning with changes, the extent of which it is difficult to assess at present for enterprises and employees, as well as for society as a whole.
2. New information and communication technologies represent one factor in speeding up trade flows. Markets globalise and simultaneously segment in order to retain increasingly mobile customers. Businesses will have to adapt their structures more and more quickly in order to remain competitive. The intensive use of team-work, flattening of hierarchies, devolved responsibilities, as well as greater multi-tasking are leading to the growth of learning organisations. This contrasts with the Taylorist work organisations, which still operate in a number of enterprises in Europe. Public service enterprises are confronted with the same challenges.
3. The ability of organisations to identify key competencies, to mobilise them quickly, to recognise them and to encourage their development for all employees, represents the basis for new competitive strategies. This allows

⁵ The ETUC delegation includes representatives of the Eurocadres/CEC Liaison Committee

⁶ UEAPME - European Association of Craft, Small and Medium-Sized Enterprises; the Polish Craft Association – a partner in PL-106 is a member of UEAPME

⁷ 28 February 2002

enterprises to keep in line with customer expectations and employees to improve their employability and career prospects.

4. In the context of technological developments and of diversification of work relations and organisations, employees are confronted with greater mobility, internal and external to the enterprise, geographical and occupational, and to the need to maintain and improve competencies and qualifications levels.
5. Against this background of rapid pace of change, the social partners at European level affirm the development of competencies and the acquisition of qualifications as major challenges of lifelong learning.
6. The ageing population and the social expectations, which have resulted from higher levels of education of younger generations require a new way of approaching learning systems, ensuring that there are opportunities for all age groups – both women and men, skilled and unskilled – if significant increases in competencies and qualifications levels are to be achieved. Lifelong learning contributes to the development of an inclusive society and the promotion of equal opportunities.

II./ SOCIAL PARTNERS' APPROACH

7. Whilst lifelong learning encompasses all learning activity undertaken throughout life, the focus of this initiative by the European social partners is to:
 - make an effective and specific contribution to the realisation of lifelong learning in the context of the strategic objectives established at the European Councils of Lisbon and Feira on employment, social cohesion and competitiveness;
 - give impetus so that the development of competencies and the acquisition of qualifications are perceived as a shared interest by both enterprises and employees in each Member State;
 - affirm the joint responsibility of social partners at all levels with regard to competencies development and promote their cooperation;
 - acknowledge the broader dimension of the challenge, which calls for a close cooperation with public authorities as well as education and training institutions at all levels.
8. In addition to social dialogue, the success of this initiative depends on:
 - each enterprise making the development of its employees' competencies crucial for its success;

- each employee making her/his own competencies development crucial for the management of her/his working life;
 - the State and local communities fostering learning opportunities in the interest of competitiveness and social cohesion.
9. The social partners call for the creation, within the institutional framework of each Member State, of conditions, which will further encourage the concerted development of competencies and qualifications, in addition to existing unilateral approaches to learning.
10. The lifelong development of competencies depends on the existence of a solid foundation⁸, with which individuals are equipped during their initial education.
11. This solid foundation should be jointly defined and updated by the national education systems and the social partners. It is necessary to reflect further on the subject, in order to specify the content and the conditions needed for each young person to obtain this solid foundation. The social partners must be associated with this reflection.

III./ DEFINITIONS

12. For the purpose of this initiative,

- “Competencies” are the knowledge, skills and know-how applied and mastered in a given work situation;
- “Qualifications” are a formal expression of the vocational or professional abilities of the employee. They are recognised at the national or sectoral level.

IV./ FOUR PRIORITIES

13. The social partners assert the principle of shared responsibility of players with regard to four priorities and call for the intensification of dialogue and partnership at the appropriate levels. The social partners believe that the lifelong development of competencies depends on the implementation of the following four priorities:

- identification and anticipation of competencies and qualifications needs;
- recognition and validation of competencies and qualifications;
- information, support and guidance;
- resources.

⁸ The following elements have been identified as forming part of the solid foundation: reading, writing, numeracy and at least a second language, problem-solving ability, creativity and teamwork, computing skills, ability to communicate, including in a multi-cultural context, and the ability to learn how to learn, etc.

1. IDENTIFY AND ANTICIPATE THE COMPETENCIES AND THE QUALIFICATIONS NEEDED

14. Identifying competencies and qualifications needs and anticipating their development represents a complex task given the numerous socio-economic factors, which must be taken into consideration, but it is imperative nevertheless. The social partners regard this identification and anticipation as taking place at two levels:

The enterprise level:

15. Identification of competencies at enterprise level must become a main axis of human resources policies covering all employees in enterprises and an issue for in-depth social dialogue:

- responsibility lies at the highest managerial level for deciding the overall competencies development plan necessary for the success of a company's business strategy;
- defining and answering competencies needs require the joint involvement of employers and employees;
- individual competencies development plans jointly elaborated by the employer and the employee are important to foster joint efforts to develop the employee's competencies;
- developing a learning environment is also important for success; professionals and managers play a crucial role in this respect.

The national and/or sectoral level:

16. The collective analysis of competencies needs and of the development of vocational or professional qualifications is a priority in relation to what is at stake for:

- young people in the context of their career guidance and integration into working life;
- employees in the management of their careers and their capacity to remain in employment;
- job-seekers, in view of the developments on the labour market;
- companies, in terms of their competitiveness.

17. In order to put this identification and anticipation into practice, the European social partners consider it necessary to:

- work in partnerships with education and training providers at all levels;
- develop networks to collect information and exchange experiences, including by making effective use of existing European instruments such as the European monitoring centre for change or Cedefop.

2. RECOGNISE AND VALIDATE COMPETENCIES AND QUALIFICATIONS

18. The European social partners regard the recognition and validation of competencies as essential, in order that:

- each employee is aware of and encouraged to develop her/his competencies in the course of her/his occupational life;
- each enterprise has the tools to better identify and manage the competencies in the company.

19. The social partners consider it necessary to deepen dialogue with the aim of improving transparency and transferability, both for the employee and for the enterprise, in order to facilitate geographical and occupational mobility and to increase the efficiency of labour markets:

- by promoting the development of means of recognition and validation of competencies;
- by providing a system for transferable qualifications;
- by identifying the possible links and complementarities with recognised diplomas.

20. At European level, social partners will contribute to on going discussions on transparency and recognition of competencies and qualifications.

3. INFORMING, SUPPORTING AND PROVIDING GUIDANCE

21. In order that both employees and enterprises can pursue a strategy for competencies development, it is necessary:

- to enable each employee and each enterprise to access all the necessary information and advice;

- to provide SMEs with suitable information and to assist their managers through the creation of customised support.

With this aim in mind, the social partners call for:

- the development of facilities allowing employees and enterprises to be supported in their choices of learning, and to tailor the content according to competencies they have already developed, for example through a one-stop-shop facility in Member States, including a database on lifelong learning possibilities and opportunities for career evaluation;
- these facilities to be easily accessible and relevant with regard to labour market developments.

22. To promote a lifelong learning culture, both trade union and employer organisations have a key role to play in informing, supporting and advising their members and need to develop in house expertise to perform this role.

4. MOBILISING RESOURCES

23. Mobilising resources for the lifelong development of competencies is a key question, which cannot be regarded as depending exclusively on social partners. Other players have also an important role, notably:

- public authorities in order to promote labour market integration;
- the enterprise in order to develop its key competencies;
- the employee in order to play a part in her/his own development.

All players (enterprises, employees, public authorities, social partners) need to seek new and diversified sources of financing.

24. As regards the social partners, they consider the lifelong development of competencies as a priority and assert the principle of shared responsibility for mobilising and optimising resources. The social partners want to promote co-investment and to encourage new ways of recourcing lifelong learning, through the effective and creative management of funding, time and human resources.

25. They call upon the whole range of players in this effort and advocate that it should operate in the following directions:

- to promote exchanges between national social partners and public authorities within Member States, with the aim of ensuring that the

taxation of enterprises and individuals encourages investment in competencies development activities;

- to direct the use of structural funds, and particularly the European Social Fund, towards giving a stronger encouragement to social partners to develop initiatives and innovations.

V./ ACTIONS AND FOLLOW-UP

26. The member organisations of UNICE/UEAPME, CEEP and ETUC⁹ will promote this framework in Member States at all appropriate levels taking account of national practices. Meetings can be organised at national level for presentation of this document. Given the interest of the matter under consideration, the social partners also decide to transmit this document to all interested players at European and national levels.
27. The social partners will draw up an annual report on the national actions carried out on the four priorities identified.
28. After three annual reports, the social partners will evaluate the impact on both companies and workers. This evaluation can lead to an update of the priorities identified. The ad hoc group on Education and Training will be entrusted with this evaluation, which will be presented in March 2006.
29. When preparing the structured work programme of the social dialogue, the social partners will take account of this framework of actions.

More:

<http://www.businessseurope.be/Content/Default.asp?PageID=465>

EXAMPLE 2

The Statement of Eurochambers and UEAPME on the occasion of the European Conference: „Corporate Social Responsibility – Competitive, Small, Responsible”

⁹ The ETUC delegation includes representatives of the Eurocadres/CEC Liaison Committee

**Statement on behalf of EUROCHAMBRES and UEAPME
on occasion of the conference “CSR – Competitive, Small, Responsible”**

Small and medium-sized enterprises are the backbone of the European economy, making up almost 99% of all businesses in the EU. Together, EUROCHAMBRES and UEAPME strive to represent the interests of over 24 million enterprises across Europe. Representing such a large and diverse group is made possible by the common interests, which unite these businesses. The active involvement of both of our organisations in the debate on CSR is of fundamental importance, as it is an issue that has everyday impact on all SMEs.

Responsible business practises are of ever-increasing importance in our societies. There is a growing awareness of and demand for compliance with CSR practises from lenders, insurers, consumers and the general public. In addition, there are many ways in which SMEs can benefit from proactively pursuing more socially responsible actions. Opportunities can be delivered in a wide range of areas by being a socially responsible business, such as identifying cost savings or new markets, improving customer relations and enhancing the image of a business in the community.

Raising the awareness of CSR amongst Europe’s SMEs is vitally important, both in encouraging them to employ increasingly socially responsible business practises but also in demonstrating the benefits of these practises and promoting methods for effectively communicating these actions to key audiences.

We have strongly supported the bottom-up approach to this awareness-raising campaign, which encourages SMEs to reap the positive benefits of CSR rather than making it another burden with which businesses have to struggle.

Having actively participated in the European Multistakeholder Forum on CSR since its launch in October 2002, EUROCHAMBRES and UEAPME are committed to playing an active role in the CSR debate, representing the interests of our members.



Arnaldo Abruzzini
Secretary General
EUROCHAMBRES



Hans-Werner Müller
Secretary General
UEAPME

14 June 2005

EXAMPLE 3

The Position Paper of the European organisations of SMEs – prepared by the SMEs umbrella organisation – UEAPME, together with national member organisations.



UNION EUROPEENNE DE L'ARTISANAT ET DES PETITES ET MOYENNES ENTREPRISES
EUROPÄISCHE UNION DES HANDWERKS UND DER KLEIN- UND MITTELBETRIEBE
EUROPEAN ASSOCIATION OF CRAFT, SMALL AND MEDIUM-SIZED ENTERPRISES
UNIONE EUROPEA DELL' ARTIGIANATO E DELLE PICCOLE E MEDIE IMPRESE

UEAPME¹⁰ position paper on adult learning

General Remarks

UEAPME welcomes the attention the Commission pays to the issue of adult education. If Europe wants to be a knowledge based society, it urgently has to improve the participation rate of its citizens in lifelong learning with a specific focus on adults.

Importance of adult learning

Adult education can be seen as a tool to address various challenges facing the European society today, such as:

- The mismatch between the skills demand and the supply on the labour market
- The low participation rate of older workers in the labour market
- The high level of low skilled employees
- The demographic change
- Poverty and exclusion
- The lack of integration of immigrants

Nevertheless one has to be aware that adult education is not a magic bullet which can be expected to solve all problems and that the readiness and motivation of adults to learn should be prepared at an early stage. Therefore it is necessary to ensure consistency and continuation between initial training and adult education through a lifelong learning approach.

Labour market participation

While adult education has various objectives, one of the main purposes should be to increase the employment level and keep workers employable. Lifelong learning and more specifically adult education form an essential element of the flexicurity concept.

¹⁰ The Polish Craft Association, the partner in PL-106 is a member of UEAPME

In order to assure the employability of the workforce, workers need to continuously update their skills and competences.

While being aware of the benefits of adult education, there remain various obstacles which limit the participation in adult learning.

Obstacles to participation in adult education

The barriers to participation by individuals in adult education are manifold.

The Commission outlines in its communication “Adult learning: It is never too late to learn” some of the causes for the low participation, which are often:

- policy-related;
- informational (level of access to good and timely information),
- provider-related (entry requirements, cost, level of learning support, , nature of learning outcomes, etc);
- situational (the cultural value attached to education; the extent to which the life situation or the family and social environment of the adult supports participation)
- dispositional (the self-esteem and self-confidence of the adult as a learner, often linked to failure in previous educational experiences).

UEAPME agrees with the Commission that *demand-side reasons are often the most serious barriers: lack of time, due to work or family reasons; lack of awareness and motivation, as people do not see learning valued or rewarded enough and hence fail to perceive its benefits; lack of information on the supply and lack of financing.*¹¹

Motivation is the key denominator. As there are different reasons for participating in adult education (such as for professional reasons, for societal and for personal development), the level of motivation varies significantly according to the purpose of participating in adult education.

Unfortunately, there is a significant segregation in the uptake of lifelong learning. Mainly higher educated people participate in continuous education, while the participation rate of lower educated people is poorer. There is a need for creating a strong *European learning culture*.

Addressing these obstacles

Improving awareness and guidance

In order to achieve a *European learning culture* and increase the participation in lifelong learning, it is crucial that the benefits of lifelong learning are made clear to the individual workers and companies in particular by using the learning outcomes approach. This requires better and more accessible information and communication on the added value of continuous learning.

¹¹ Communication from the Commission Adult learning: It is never too late to learn

Moreover individuals and small organisations have a real need for guidance. They should be better informed on the existence and availability of training possibilities, but also better accompanied in their choices and the possible use in their daily life. Intermediate bodies such as craft chambers are key since they are locally organised, have direct contacts with the businesses and are present all over the country.

Furthermore, it is often forgotten that craft and small entrepreneurs also need continuous training, in order to stay competitive. However, the difficulties they face for participating in adult education, such as a very limited time schedule and lack of focused information on training offers, are not adequately addressed.

New educational methods

An important challenge in the field of adult education is the need to adapt the classical pedagogical methods to the specific needs of a population which has other demands than secondary pupils or students.

Adults, who are willing to learn, are more keen to make use of on the job acquired experience.

In most cases the current offer does not correspond to the high expectations of these groups of population.

Real efforts should be made to better adapt the training offer to a mature audience and to propose new pedagogical approaches and methods using new technologies and the knowledge of individuals.

Role of intermediary bodies in tailored made training offers for craft and small companies

Part of adult education concerns entrepreneurs and workers. In this case, the training offer is rarely adapted to the training needs of craft and small businesses. In a small company, training needs differ between the various employees and should be tailored made according to the needs of each individual.

In this respect, it is important to highlight the role of intermediary bodies as training providers such as professional organisations, craft chambers or other types of institutions, which can better respond to the training needs, as they are closely linked to the local level, and are aware of the required skills for companies and the labour market.

Intergenerational approach

Furthermore, while looking at adult education, one should not forget the link to initial education and training. If people do not receive adequate and relevant education and training before they enter the labour market, taking up adult learning will become less obvious and more difficult. Therefore increasing the attractiveness of initial VET and its uptake facilitate a higher participation in adult learning.

Role of the European level

The European Union sets itself the goal to have by “2010 the European Union average level of participation in lifelong learning should at least be 12.5% of the adult working-age population (age 25-64)”. Currently, there are huge differences between the Member States with variation from the EU average ranging from 1.1% to 34.7%.¹² UEAPME underlines the fact that actions need to be taken at national level. Nevertheless, in a situation of such extreme variations, the use of peer review and exchange of good practises are suitable tools to address this issue at European level.

Facilitate investment in continuous training for adults

European Social partners have concluded in 2002 a Framework of Actions on the Lifelong Development of Competencies and Qualifications.¹³ As part of this they outlined the principle of shared responsibility between the different actors.

They also identified the need to ensure that the taxation of enterprises and individuals encourages investment in competencies development activities. The support from public authorities is crucial. SMEs in particular need support during the periods when some of their workers are absent in order to receive training.

Adult education should not be of the sole responsibility of employers. Each citizen has a role to play in his or her personal development. Public authorities are also key actors for an important part of the adult population not directly involved in the economy such as the inactive population, unemployed people, early retired workers, young people without qualifications, etc...

Concerning investment in adult education, UEAPME firmly believes in public- private partnership. Co-financing should be the guiding principle on this issue, where public funding could serve as a lever to attract private funds. This could be either by providing fiscal incentives for companies to invest into adult education or by creating individual learning accounts, which are supported financially by the public authority depending on the commitment of the individual.

As the need for continuous learning for adults will dramatically increase, public authorities should rethink their priorities in an overall lifelong learning perspective and shift the investment from other education and training areas towards adult learning. Since the relative importance of adult education will become more significant, it should also be accompanied by more efficiency.

Therefore, wherever public financing is used, transparency and efficiency should be the guiding principles. This is more likely to be successfully achieved in the case where education and training providers offer quality assurance.

The European level will play a decisive supportive role though its Lifelong Learning programme and by making the new European Social Fund available for the use of adult education. However, it is not only a question of quantity of investment but a

¹² Progress towards the Lisbon objectives in education and training – Report based on indicators and benchmarks – Report 2006, pages 35-40, and its Annex “Detailed analysis of progress”, chapter 6.2.

¹³http://www.ueapme.com/docs/pos_papers/2002/FINAL%20DSE%20Framework%20of%20actions%20EN.doc

question of quality of investment in education and training. Making national systems more cost/effective should be the main leitmotiv for all.

Conclusion

- Adult education is an important tool in addressing some of the challenges facing the European society, such as low employment levels, the demographic change, poverty and exclusion
- One of the biggest obstacles to participation in adult education is the lack of motivation
- One can clearly identify a segregation between higher educated and less educated citizens in the uptake of adult education which needs to be addressed
- Therefore providing information and guidance are important to enhance participation in continuous education and for Craft and SMEs intermediary bodies and professional organisations have a key role to play
- There is a need for creating a European learning culture
- New pedagogical tools for adult learning should be developed
- Investment in adult education is a shared responsibility between companies, individuals and public authorities
- Investment in education and training needs not only to be increased, but more efficient. Quality of lifelong learning measures is key for success of adult education.

26/01/2007

EXAMPLE OF THE POLISH ORGANISATION OF SMEs ACTION IN THE CONTEXT OF EUROPEAN SOCIAL PARTNERS ACTIVITIES RELATED TO SENSITISATION ABOUT LIFE LONG LEARNING

The Summary of the presentation of J.Bartnik, the president of the Polish Craft Association – the partner of the CI Equal Project PL-106 - at the IV European Conference on Crafts and SMEs held in Stuttgart, 16 April 2007



4th European conference on craft and small enterprises

„Developing skills within the company: Which challenges do entrepreneurs, skilled staff and apprentices face? Necessity for investment in continuous application-oriented training and return on investment (steady process which will speed up in the future)“.

Organization of the Polish craft is acting under a law act passed by the government. Today almost 300.000 craftsmen are united in our organization – from very traditional to utterly modern, conforming to XXI century. Both of these professions are necessary for the society.

The membership in our organization is voluntary. Within the structure of ZRP function: craft guilds, craft chambers and national organization.

Polish Craft Association performs tasks entrusted by the Government in the field of professional training/learning at employer – craftsmen, and confirmation of professional qualifications by the chamber commissions.

“Craft is qualifications” - Is craft a synonym of the professional qualifications nowadays? There are various forms of European law systems at this matter. I will present some radical examples:

- in the Federal Republic of Germany the law (government) succours the thesis "craft is qualifications" because still in many professions confirmation of professional qualifications is obligatory (master of craft diploma).

- in Poland from 1988 craft diploma is not required for doing business, and the official Government doctrine is “the market will verify”.

In Poland craft diploma is obligatory for doing professional training. During one year 3500 to 4500 master craftsmen get a diploma in the chamber commissions.

The craft examinations are valuable because knowledge and skills of candidates are verified/tested by their future employers. This system has worked very good for hundreds of years and should be retained. And that should be our recommendation in aid of retain chamber examinations.

Now, therefore, we have many various systems which are a reflection of the society’s attitude and attitude of the government of the country at the range of professional qualifications for craftsmen.

It is declared by individual consumers that someone who provides services or manufactures market product should have professional knowledge and qualifications confirmed by an appropriate document. This thesis is similar to European tendency and assumptions of long life learning.

Last year we attempted to return to the idea of professional qualifications as a condition of doing craft activity assuming that “qualification is the way to quality” and "the quality of the product and service is consumer business”.

It turns out that we have met with society approval but our attempt to introduce it in the legal acts regulation has provoked opposition. Some employers, the press and public opinion accuse us of trying to “close” craft for outsiders and limit an influx of new craftsmen, restrain the developments and corporatism. I emphasize that we talk about qualifications of performers and not people running craft companies. We preach thesis that “hairdresser” should can do hair and the owner of the hairdresser`s can run the business.

Of course very important for this process is the size of the craft company. Small companies differ from the bigger ones. A “small” craftsman must have professional qualifications, however in a bigger company where many people work its owner must have other competences like: management, marketing, environmental protection etc. This knowledge is not connected directly with profession but with the business.

The help must come from the craft organizations, which must have in their activity the offer of professional qualifications but also advisory service for craftsmen. The necessity of improving education and vocational training of master craftsmen and journeymen must increase in value.

Our master craftsmen have to change themselves into managers who run their own business on a larger scale, so that young people who will receive their master of craft diploma in the future could be the owners of the business, not only employees.

In a vocational system process there are three partners who are interested in social development: employer, employee and the government. Should government support education in the craft system through e.g. appropriate legal tax system allowing employer and employee expenses? In our opinion - it should. But there is also another question: is it possible everywhere? The answer for this question is much more difficult. Every country has its own conditions, but the signal to the governments concerning the importance of vocational training in small enterprises should come out of our conference.

Small companies/micro-enterprise, especially service companies require high knowledge and qualifications from their employees. Craft companies employ new automation technologies which caused the process of rationalization. There are fewer and fewer places of work for nonqualified workers. It is hard to say how far the process of up-to-dating technologies goes in craft companies.

The process of up-to-dating technologies occurs along with producing highly valuable products, which confirm to individual client needs (this is a characteristic feature of

craft companies). This activity restricts the extent of automation process which is caused by the size of enterprises and leaves slight freedom of investment. Without qualified workers many enterprises will not manage to deal with the competition.

A craftsman and his worker should have knowledge and qualifications in the entire profession, not only in a narrow speciality.

In this way, we are coming to preparing an employee to the profession. Generally speaking there are two ways of the preparation to the profession: trade school and practical learning at employer-craftsman. In Poland employer-craftsman teach in 106 craft professions and nowadays more than 85 000 young people are taught in this way, including 33 000 young students at the first school year.

The features of the practical learning at employer:

- individual training system,
- practical learning at employer and theoretical learning at school,
- learning in real not illusory working conditions,
- the possibility of confronting the tasks performed with customer reaction,
- work in a team and training by more experienced, older employee - “mentor”,

This is the best preparation for employees to come onto the market.

According to Lisbon 2000 we are trying to change the industrial society into the informative society. In this situation basic school and vocational education will be less and less sufficient and the actions in aid of vocational training will be essential.

It is necessary to strengthen vocational training system and connect practical learning at employer with a trade school. The tendency of doing vocational training at school does not meet the market demands.

One of the important thing in vocational training system is the balance between the time of practical learning and gaining general and vocational knowledge. Practical learning at employers enables pupils to master professional skills and expertise to conform to their employers` requirements towards their future employees. Enterprise environment and natural working conditions during work have an important influence on pupils and graduates` professional skills and their adaptation to the changing market conditions.

The main problem for us in Europe is decreasing popularity of vocational training. For young people more attractive is to pass the secondary school leaving exam and continue their studies at a university than to choose vocational training. Additionally, the problem is aggravated by a decrease in birth rate which has particularly bad influence on craft that is small and medium-sized enterprises, which need qualified

workers. That's why the actions in aid of increasing the attractiveness and quality of vocational training are so important.

The syllabus have to be updated regularly so that the knowledge and professional skills were up-to-date. Also masters of craft should be prepared for the reality of the market economy.

The results of the research demonstrate that most of the craft companies workers are recruited from this group. We might build a thesis that such situation will be reminded in the future. That's why the vocational training system at employers should be maintained and developed in our countries, as a one of the way to learning the profession and, in my opinion, this recommendation should come out of our conference.

Long Life Learning in a craft enterprise should be an interest of the economy and local government and be regulated by a state only in a limited way. However, the essential points are development in professional training quality, its clearness and the mutual confirmation of vocational qualifications in the EU, which are based on comparable standards. The EU work on the European Framework System based on European Qualification Frame (EQF) and ECVET may enable agreement on this matter in the European Community.

Much importance for professional development may have „journeyman migration”, with the aim of improving the knowledge and profession continuation of the motto: "learning through work". It is necessary to promote „journeyman migration” during the vocational training. In this way young people broaden their horizons, but first and foremost accumulate their international experience, develop cultural skills, develop network and learn the way of work and other countries` customs. By the time, we should analyse craft examinations within the framework of European craft organizations, which will allow us to define the acquired and confirmed qualifications as well as compare them. It will be the first step which will make „journeyman migration” possible. Of course, it requires money, big money, but for this reason European fund should be found.

To sum up, we should set ourselves the task of pursuing the creation of a system, in which small entrepreneur will be vocationally trained for his job, for running a business and will be prepared for the future. This is the key role of the craft organizations.

The [agenda](#) of the two-day conference focused on three key strands:

- **Skills for the future:** both small entrepreneurs and their staff need to be properly trained to maximise their input in a business environment that is getting increasingly competitive and knowledge-intensive. Actions on lifelong learning, qualifications and mobility were discussed.
- **Developing future markets:** crafts and SMEs must be enabled to reap the benefits of new business opportunities in the enlarged European Single market and beyond, as well as in new markets for their innovative products and services.
- **Improving the business environment:** adequate support structures and networks must be encouraged. Moreover, a real "think small first" principle should be applied across all policies, including standardisation policies, when reviewing legislation or putting forward new rules.



Globalisation, demographic change and technological developments are equally important factors in the changing business atmosphere crafts and SMEs have to deal with, and were examined in detail during the event. Particular attention was also given to the local and regional dimension of SME policy.

The event was opened by Mr Günter Verheugen, Vice President of the European Commission, whose speech can be found online on the [European Commission's website](#).

Conference participants had then the chance to attend one of three parallel workshops on the key strands mentioned above. Each workshop was divided in five sessions, after which a final "reporting back" roundtable was

held, followed by the presentation and the adoption of the conference conclusions in the presence of EU Council President Angela Merkel and Commission Vice President Günter Verheugen.

Workshop 1: Skills for the future

Session 1 dealt with how to ensure that future oriented skills are available within craft and small enterprises. Entrepreneurs and their staff will need to learn how to master the challenges of globalisation, demographic change and technological developments. According to Dr **Karl-Jürgen Wilbert**, Executive Director of the Crafts Chamber of Koblenz, Germany, it is important that crafts and small businesses are involved in the design of vocational education curricula, which must be strengthened as much as possible, in particular in new Member States. **Martina Ni Cheallaigh**, from the European Commission's DG EAC, spoke about present and future priorities at European level on education and training. She stressed that since the 2000 Lisbon European Council, Member States recognise the importance of enhanced policy cooperation on the basis of common objectives. A number of common principles, references and guidelines have been developed since then on issues such as lifelong learning, qualifications and vocational education and training. She also mentioned the importance of programmes such as Socrates and Leonardo da Vinci. For the future, Ms Ni Cheallaigh saw the need for a debate at European level in further areas such as pre-school, school education and teacher training. She said that the European Commission is looking forward to the establishment of the European Institute of Technology that will bring together research, business and education at the highest level.



Session 2 focused on creating viable framework conditions for mobility. Ms **Janja Meglič**, from the Slovenian Chamber of Crafts, spoke on creating a common space in education and training. On the basis of the Copenhagen-Maastricht declarations and the Helsinki Communiqué, there is a strong common interest in the EU to create and develop common instruments to make the education and training process in EU countries more transferable, flexible and connected as closely as possible to the relevant needs of craft and small enterprises. Ms Meglič singled out the European Qualifications Framework (EQF), the European Credit (Transfer) System for Vocational Education and Training (ECVET) and the Europass project as key examples in this respect. Ms **Catherine Guy-Quint** MEP spoke on how to enhance mobility for young apprentices. Under the current situation, programmes such as LEONARDO are not used to their fullest to stimulate mobility. Ms Guy-Quint suggested the introduction of an "Erasmus-style" programme for apprentices, which would redress the current situation.

Session 3 discussed Lifelong Learning in small enterprises. Mr. **Jerzy Bartnik**, President of the Polish Craft Association ZRP, spoke about developing skills within the company through continuous training investments. He highlighted that, while the return on investment may vary, it is essential for small entrepreneurs to invest in training to ensure a good performance of their businesses. Mr **Bernard Stalter**, President of the Chamber of Commerce of the Alsace Region in

France, introduced a project that its organisation is currently running on how to maximise training offers for lifelong learning. First of all, a good flow of information on the available training opportunities must be established; secondly, training supply and demand must be adequately matched; thirdly, the project will run 22 officially recognised "Crafts Universities", which will train craftsmen and small businessmen on issues such as enterprise management and human resources.

Session 4 dealt with the entrepreneurial aspects, such as motivating young people to become entrepreneurs and ensuring "workability" and business continuity. Mr **Heinrich Traublinger**, Member of the Landtag of Bavaria and President of the Crafts Chamber of Munich and Upper Bavaria, dealt with the first aspect, while Dr **Jurgen Tempel**, a general practitioner, elaborated on strategies for motivation, training, work organisation, health and safety throughout the professional life.

Session 5 focused on cooperation between higher education institutions and small enterprises. Mr **Doru Talaba**, Professor at the University of Transilvania in Brasov, Romania and President of EUE-Net, the University-Enterprise Dialogue Network, opened the session. The EUE-Net network is now in its third year of operations and counts 82 partners in all European countries. He stated that unless an official European framework for University-Enterprise cooperation is established, cooperation would remain scattered, just as result of occasional projects like EUE-Net. A permanent European Programme jointly supported by DG Education and DG Enterprise would be the ideal solution in this respect. Ms **Anne de Blignièrès-Légeraud**, Professor at the French University of Paris Dauphine, spoke about the benefits of regional and inter-regional cooperation between Universities and enterprises, stressing that there are mutual advantages for both worlds from closer synergies. According to Ms de Blignièrès-Légeraud, craftsmanship and entrepreneurship should become a permanent feature in education curricula, whereas research on the specificities of craft-type enterprises could actually improve the business environment in which they operate.

EXAMPLE OF THE POLISH SOCIAL PARTNER INVOLVEMENT IN VOCATIONAL TRAINING - AT THE NATIONAL LEVEL¹⁴

SENSITISATION OF ENTERPRISES – PROFESSIONAL QUALIFICATIONS OF EMPLOYEES IN THE CONTEXT OF ECONOMIC ACTIVITY

Four pillars of education, which are concerned in an International Committee Report on XXI century education under guidance of Jacques Delors are :

- Educate oneself to know
- Educate to act
- Educate to live
- Educate to live all together

In these maxims we can notice profound human knowledge as well as a hint how to create knowledge based society.

As the time passes by, the character and role of work is changing. XXI century is going to be the time of rising quality of products, made by highly qualified workers.

The employee model has changed; competences and knowledge are nowadays far more appreciated than muscles. The entrepreneurs want to employ workers with a wide range of skills, qualifications and competences who not only know how to work but also want to learn more. The main goal of an entrepreneur is to achieve planned goals simultaneously with development of employees. Machines are not underappreciated because everyone knows that one has to invest in employees as well as in technical devices.

But there always are some difficult decisions to undertake by an entrepreneur such as weather to change the staff (worker) or to adjust them to one's own needs. Unfortunately, it is not possible to answer this question – these processes must take a course in the same time. Nevertheless we may govern the situation by establishing the vocational education system in a group, organized form as well as in individual form.

The goal of an entrepreneur is to achieve maximal profits, multiplied goods or render best quality services. What matters to the employee is high wage and steady, satisfactory work

The most important issue that needs to be highlighted is that these two goals are not in a contrary.

1. Vocational qualification and economic activity

It is required to define needs of the enterprise before we start the assessment of qualification of employees already employed or potentially employed. Every employer

¹⁴ Polish Craft Association – the partner in CI Equal Project PL-106 is a representative social partner organisation representing SMEs, member of the Tripartite Committee for Social and Economic Issues.

should be aware of the current state of his enterprise as well as of the foreseen actions to be undertaken such as: strategic goals of his economic activity.

Determining targets and development perspectives ought to be present in the entrepreneur's life from the very beginning - from the moment of establishing his business. But it is a well known fact that this kind of decision can be taken up by an accident or can be forwarded by deep analyze.

Many factors have to be taken into account because they may consequently have influence on quantity of crew as well as on the quality of its professional qualifications.

The entrepreneur who wants to work on the local market and concentrate himself on services has different human resources needs than the entrepreneur that acts on the international market and widen his activity on bigger scale.

It is important to gather information from the company before undertaking decisions concerning qualifications of the staff. We need to know:

- Which professions are essential?
- what kind of employees we need
- what is the required level of their professional qualifications

Small enterprises concentrated on services usually employ highly qualified specialists from very narrow branch – tailor, for instance. In such a situation, not only it is easier to run efficient business when we have employees with wide range of competences but also to implement fluently changes in human resources (f. ex.: because of technological innovative changes)

Production sector meets different market circumstances. Firstly there are much more highly qualified people realizing the strategic goals and merits – in that case we have to take into account administration staff, accountancy and PR as well.

Secondly, when the whole crew is concerned, each employee should have the similar level of competences to avoid the “narrow throat” in the process of production

From the employer's point of view, it is essentials for the employee to represent various skills from one profession, what allows adjusting work organization to market needs.

These are important and profitable elements from the employee's point of view as well Achieving various professional qualifications not only increases professional competences of the employee but also strengthens his position in the company.

Not every single qualification can be useful in the enterprise to the equal extend. But in case there is a necessity of changing job, such adaptability is indispensable. The employee should be interested in achieving new qualifications – they become his own capital, after some time the capital of his company and at the end, the capital of the whole economy.

Summarizing: The first step to assess the demand of qualified workers in the company is to decide what kind of enterprise should be established (developed), assume goals and foresee steps. It concerns not only buildings, devices but also workers.

We can assume that:

- 1) The smaller company, the better overall qualification employees should have
- 2) In the company from the production sector, narrow, special qualifications are more expected.

The employer that can predict the development of his company can go through the second step

2. Establishing the company

Establishing the company as a start up is sometimes more convenient because one doesn't have to take care so much of hitherto boundaries. The only problem that he can encounter is local labour market and amount of money he can spend on it. Polish society is still not keen on moving out to find new job. Lack of mobility is caused in a big extent by the difficulties with finding new flat in other city. Nevertheless it seems to be the feature of previous generation – more and more young people move out abroad to look for the job in European Union. It's highly possible, that this trend will be fruitfully implemented on the Polish territory during following years.

The start-up enterprise is in a totally different situation, sometimes it may seem to look better but it all depends on circumstances, mainly the development stage.

3. Raising qualification

Nowadays it is obvious for all of the employers that without investing in human resources it is impossible to develop the company, change its profile or uplift the quality of services. Unfortunately we may still encounter different attitude among people who do not understand that investing in people equals investing in their own business.

We need to ask several questions to find out some crucial issues:

- *Do professional qualifications of my staff correspond to my strategic aims?*
- *Is it possible to achieve all of the planned goals with such employees?*

To attain reliable answer we need to check precisely the qualification of already employed people. Similar check - list concerning all of the documents certifying the qualification can be used towards future candidates.

4. Official recognition/certification of qualifications

The first stage of the check-list will be the analyse of worker's documents. These documents are about to check professional skills and competences. That act should be forwarded by the demand directed to all workers to supplement their documents.

The issue seems to be complicated, because there is various types of documentation that certify professional qualification such as.:

- a) School documents that certify finishing after-primary school (before the reform of the educational system) post junior high school including university
- b) Off-school documents that certify acquiring formal professional qualification - courses, trainings
- c) Documents that certify gaining qualification within non-formal education – professional experience.

4.1. School documents

Assessment of school documents may occur problematic - often changes within educational system, teaching systems, attitude assuming that qualification gained during school education is only a part of qualification that a profession consists of.

An example: for many years the diploma of a qualified worker have been given to the graduates of vocational schools, who never worked before or had only chance to spend couple of months on the apprenticeship in an enterprise. School documents, quite often do not contain information concerning the scope of education and implemented program. Moreover it may be a difficult problem to find out these issues in a local National School Board or the adequate university.

4.2. Off-school documents

In the off-school system, documents certifying professional qualification can be achieved by passing national exam conducted either by a craft chamber exam committee or national exam committee established by the national school board. Craft chambers, acting on the basis of legal acts, give out a document called "journeymen diploma"

(An exam after 3 years of learning the occupation or after 3 years of work within the profession) and „master of crafts diploma” (an exam after 3 years from the time one become a journeymen). Taking into the consideration that this way of certifying qualification is open for various groups o beneficiaries – this subject will be analysed more thoroughly later on. National Exam Committees give in documents of the qualified worker and master of crafts diploma. Documents published by Craft Chambers and National Exam Committees correspond to each other according to Polish law.

The merits of journeymen and master exams conducted by commissions from Craft Chambers are defined by educational standards available on Polish Craft Association web site – www.zrp.pl. The content of the exams conducted by national committees is available in National School Board.

Besides formal documents drawn out by entitled institutions and organizations there are documents like certificate drawn up by other educational institutions and organizations. These documents certify the attendance in a course or training but there are no information concerning the content, materials, number of hours etc.

It is quite difficult sometimes to achieve such knowledge because on the contrary to well known and reliably institutions like TNOIK and ZDZ there are some institutions that change their name and address very often.

Even though Polish legal system defines the rules of drawing up and handing in attestations for those who attend the seminary, course or those who wanted to certify gaining new qualification, the reality shows that all depends on the training institution . Unfortunately there is no formal system of recognition such documents – the employer may take them into consideration but he doesn't have to.

4.3. Documents certifying acquired professional qualification

Asset of professional qualifications usefulness in Polish legal system is not formalized so much as in France for instance. But we can predict that this situation will be changed soon.

Currently experience attained in an informal way is taken into consideration both by the craft chambers (concerning exams) and employers. It is obvious that every action in a certain point should become more solid, formal form. The bigger enterprise the more important place will be given to forms and procedures. Documents certifying work experience should consist of all essential issues regarding the character of the occupation.

It is much more convenient for the employer to asset the qualification of an employee who works in the company for years. The situation looks totally different when the potential employee represents experience attained by working for other company.

Then we encounter problem with identification of new qualifications within professions and specialties described in documents. To recognize these issues we may need documents drawn up by the Ministry of Education or by the Ministry of Labour (disposal of school classification and exam standards, disposal of professions and specialties)

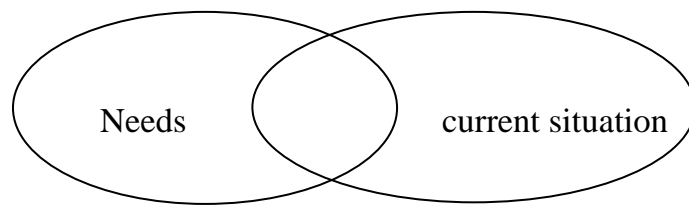
Generally, the question of professional preparation of a worker or potential worker is not always easy to answer. Most of the time it is up to the employer what kind of steps will he/she undertake. If the recruitment is conducted by the professional agency that looks for specialists, the situation looks much easier. Nevertheless agencies are hired rather seldom because of additional costs for the employer.

The most convenient way in that case is to employ the chosen person for the probation period. (Art. 25 of Labour Code) That solution requires a lot of formal regulations what may repulse some entrepreneurs.

Preparing a sheet of professional qualification is one of the tools that facilitate the process of assessing the candidate. There should be not only personal details but also school documents, non school documents and certificates as well as documents certifying apprenticeships. Comparing such a sheet with requirements concerning the certain work position will give the answer weather the candidate meets the expectations of an employer.

With such knowledge, after thorough analyze compared with our needs we may try to answer the question: *Will this employee, with his/hers professional skills, guarantee the success for my company?*

If this question concerns the whole staff of the company, we achieve the answer which is easy too describe in a graphic form:



The common/shared field shows the convergent point between current situation and our needs. This field can be bigger or smaller but it is a difficult challenge to find the total accordance.

4.4. Human resources needs – level of employee’s qualification

The employer, who already has the assessment of human resources needs as well as the assessment of the current situation in the company essential for further development, meets following dilemma:

- a) Change part of the staff because of their not efficient qualifications and start to look for new employees
- b) Start the process of investing in workers through creating the system of various trainings and courses which can be finished by formal certifying of new acquired qualifications.

Looking from the point of view of employer and employee as well, starting and financing the proces of education is an efficient and long lasting decision. Current legal regulations, such as regulation on labour market institutions and promotion of employment support this way of thinking. Even though the legislator created the

facultative system of co-financing, every employer is able to find some satisfactory solutions. Problems with establishing the training fund are the element of the whole educational system, that is way it is described in further part of the text.

5. Certifying professional qualification – tools

Certifying competences within school and non school system - Examples of the Craft Chambers.

Nowadays in Poland there are 3 ways of formal certification of qualifications acquired through education at school and in non school forms (non formal professional education as well):

- Professional qualification exams – so called outside exams– conducted by the Local Exam Committees for the graduates of professional schools. These exams are directed to apprentices who learn their profession in vocational schools
- Qualified worker /master exams – these exams are conducted by the exam committees created by the National School Board on demand of employer organizations, training institutions or self initiative.; they act within craft organizations (for example for salesman)
- Journeymen/master of crafts exams - conducted by the exam committees established by Craft Chambers for graduates of craft professional education and adults, who achieved qualifications corresponding to certain craft profession.

5.1 Journeymen and master exams – legal basis

Law on Crafts 22 March 1989 (Dz.U. Nr 112, 979, 2002 –completed text– Dz.U. Nr 137, poz. 1304, 2003) Ministry of Education Regulation - 12 October 2005 on journeymen and master of crafts exams conducted by the Craft Chamber exam committees (Dz.U. Nr 215, poz. 1820).

Content and sort of exams

Craft Exam Committees conduct journeymen and master exams in the professions corresponding to certain craft profession, that exist in profession and competences classification for the needs of labour market. This classification is created and implemented by Ministry of Labour. The classification of school professions which is implemented by the Ministry of Education, is also prepared and created on this ground, (it's previously consulted by other resorts, that have legislative initiative)

Within craft regulation there are no decisions concerning what kind of economic activity may be called craft.

Establishing and composition of Exam Committees:

- a) Committees are appointed by the entitled executive organ of Craft Chamber, usually the Board of the Chamber. The Committee is established for 5 year cadence – this period of time can be prolonged or shortened by the Board of Chamber. It is not written in which cases such a situation can take place. The official residence of the Committee is the same as of the Craft Chamber - it means that documents certifying professional qualification, journeymen diplomas, master of craft diplomas are drawn up over there. There are any restrictions for conducting exams on outgoing sessions – if the chamber gives its consent to such a decision. All of the organizational and formal tasks are coordinated by the Chamber that established an exam committee.
- b) The committee comprises the chairman, vice chairmen, members and secretary members. Quantity of people in the committee depends on the statutory power of chamber that appoints the committee. Usually it depends on amount of candidates who want to approach the exam in a certain profession. The more people want to approach the exam, the more exam committees are created.

The chairmen and his/hers deputies are obliged to finish high studies and work in a certain profession at least 6 years. This is a rule, but there are some exceptions: one can finish secondary school but then needs a master of craft diploma and 3 year time work experience.

The members of the committee must have at least theoretical education in certain profession, master of craft diploma and 3 year time work experience in that field of employment

Sometimes it is allowable to appoint as a committee member the person who with an engineer degree and 6 year time work experience.

Secretary members must be the employees of a craft organization from at least 2 years and must have at least secondary education. The secretary member takes care only of administration and organizational service.

People who are appointed to be a part of the committee need also confirmed pedagogic skills - pedagogic 80 hours course, which content was accepted by the National School Board, accomplished with a national exam.

All of the committee members are obliged to attend and finish the training organized by the craft Chamber - the content of such training includes issues concerning organization of a committee work, exam rules, and methodology of preparing exam tasks and questions, rules of assessment. The program of this training is drawn up by the Polish Craft Association.

The person who is a member of a statutory power in the Chamber is not allowed to become a member of a committee – because of the appealing procedure.

The statutory power of a chamber decides whether the complain of a candidate is justified or not.

Craft Chamber informs Polish Craft Association about the appointment or recalling of a committee – journeymen as well as master of crafts committee. Polish Craft Association on the ground of regulations on craft governs the activity of chamber committees.

- c) Exam team conducting an exam during a session comprises members of the Exam Committee: chairmen of the Committee or his/hers deputy as chairmen of an exam team, committee members and the secretary. Exam team that conducts master of craft exam composes of at least 5 people: the chairmen, 3 members and the secretary. Journeymen exam team composes of at least 4 people: the chairmen, 2 members and the secretary. In any of above mentioned commissions/exam teams, there may be a person who is, or was for last 3 years, a teacher or employer of a candidate. It also concerns any circumstances where the connection between a committee member and the candidate is not clear or may be not objective.

Approaching an exam

The candidate who wants to get a journeymen or master diploma submits all the necessary documents in a craft chamber and leaves his application. There is one territory rule: The graduate of a vocational education in the craft enterprise is obliged to approach the exam in the chamber that associates the enterprise or guild, he/she was working in.

Other candidates have free choice which chamber to choose. There is no central system of registration. The candidate submits one photography or its copy and a receipt certifying the payment for an exam. The price is set by each chamber individually.

The journeymen exam can be approached by a candidate who fulfils one of the following conditions:

- Accomplished the education in the craft enterprise and raised qualifications at school or in a non school system
- Finished post junior high school or 8 year lasting primary school and accomplished education in a non school system
- Finished post junior high school or 8 year lasting primary school and accomplished education in a non school system plus 3 or 2 year time of work experience in a certain profession (the same as planned exam)
- Finished post primary school that runs vocational training plus half of the year work experience (the same profession as planned exam)
- Has a degree in a similar profession and can prove at least half a year experience time in the same profession as the planned exam.

Journeymen diploma is a national document certifying professional craft qualifications. It entitles to employ oneself as a qualified worker. After 3 year time one can approach the master exam

The master of craft exam can be approached by candidates who already have journeymen diploma and can prove at least 3 year time work experience in a concerned profession. This is a general rule that underlines combining probation with theoretical education. But there are some exceptions: if someone run his own business in a certain profession but still wants to certify his/her skills, has such a possibility in case he/she has the diploma of post junior high school (this is a crucial condition)

The candidate must fulfil following conditions:

- journeymen diploma (or an equal one in a certain profession), 3 year time work experience or 6 year time experience in his/her own craft business plus certificate of finishing post junior high school
- master of craft diploma in a related profession , at least one year work experience and certificate of finishing post junior high school or hitherto post primary school
- secondary or high technical education and at least 2 year work experience in a profession.

Master of Craft diploma is a national document certifying highest craft qualification. It facilitates running one's own economic activities and entitles to occupy managing positions as well as to train the apprentices. (If one have passed the pedagogic exam)

Master of craft and journeymen exams are conducted in two steps, which order is set by the chairmen of the committee in cooperation with craft chamber

- theoretical
- practical.

The practical step requires carrying out individually practical tasks, which are prepared by the exam team, taking into account required standards. According to Law on Crafts standards required for the craft exams are prepared by the Ministry of Education and Polish Craft Association. Polish Craft Association is entitled to prepare professional standards among professions which are not included into school list but exist as professions within labour market. Resort standards concern only the journeymen exams (vocational qualifications)

Potential disability of a candidate has to be taken into account before preparation of exam tasks. There is such a regulation but from the other hand we can not omit standard. The time needed to realize all the predicted tasks should not be longer than 24 hours during three working days. Of course not every profession requires such an amount of time.

Practical exam is organized in an enterprise which has sufficient organizational and technical (including Work and Safety standards) conditions and work places. At least

two exam committee members govern the individual work process. The criteria of assessment are prepared by the committee and accepted by the craft chamber. Collective grade is set on the ground of each practical task. If one of the practical tasks was done incorrectly, it will cause the unsatisfactory grade from the whole practical part.

Theoretical part may be conducted in a multiple choice test (3 possible answers – one correct). It is a popular solution but there are no rules regarding form of the exam. – There are 7 questions referring to each subject

A subject of the written part encompasses:

- accountancy;
- documentation of economic activity
- technical draft
- safety and Health at Work
- basic environment education
- basic regulations on Labour Law.
- basic issues concerning management and economic law

During the master exam, the written part encompasses above mentioned subjects but on a higher level. (Accountancy accompanies calculation and there are two more subjects: basics of pedagogy, psychology and methodology of teaching)

- One part of the exam can last no longer then 210 minutes (3, 5 h)

- Oral part can not last longer than 30 minutes.

- Oral part of the journeymen exam encompasses subjects such as: technology, materials science, technical devices science.

Set of questions to be tossed are prepared by the members of committee on the basis of standards. One set is composed of 3 questions from each subject.

Assessment: Scale of grades: extraordinary, very good, good, satisfactory (positive), unsatisfactory.

Assessment of written and oral part of theoretical exam is undertook after taking into account grades from each task (subject) If there is an unsatisfactory grade either from oral or written part, the whole theoretical exam is failed.

Summarizing – the candidate passed the exam, if he/she achieved positive grades both from practical and theoretical part of the exam. The candidate who became unsatisfactory grade from either oral or written part of a theoretical exam has possibility to repeat only this part

The data of a make-up exam is set by the Exam Committee, but it should not take place in two year time period. Members of Exam Committee are obliged to keep information concerning exam's assessment confidential. Candidates who are not satisfied with the examination process have right to fail a complaint against committee to the Board of the Chamber. If the answer is still not fair enough, another appealing institution is Polish Craft Association – its decision is obligatory.

Exam documentation

The secretary of the committee prepares individual minutes from each exam where personal information, composition of a committee, notes from each exam question, signs of every entitled member are included. Exam sheets are enclosed to the minutes. Individual minutes are the ground for drawing up the final, collective minutes of the whole exam session. Craft Chamber keeps all the applications for master and journeymen exams as well as two real-estate registers which are kept “eternally”

Person who passes the journeymen exam is given a certificate prepared by the Polish Ministry of Education. These documents are green. Yellow documents wait for those who passed the master of craft exam.

Journeyman diplomas and master of crafts diploma have Polish ensign because of the fact that Craft Chambers act on the legal basis and fulfil obligations imposed by a government decision.

Craft Chambers are entitled to create a duplicate of journeymen or master diploma in case it's destroyed. On such a document there is a sign „a duplicate”, surnames of people who previously were signed on the original document and the official stamp of a chamber. A duplicate does not include photography.

Documents which are to be used abroad are recognized on the back side by the Polish Craft Association and the Ministry of Foreign Affairs.

These rules came into force on 1st January 2006. (Recognition regulations are powerful from 31 October 2005).

6. Training of the professional qualification - Training Fund

Legal State

Issues concerning Training Fund are regulated in the legal act on labour market institutions and promotion of employment from 20 the April 2005 (Dz.U. Nr 99, poz. 1001) – chapter „Tools concerning development of human resources “

Main rules governed by the legislator are:

- Establishing of a Training Fund is on voluntary basis.
- Amount and sources of money devoted to this purpose is not précised.
- So far ,only the employer is charged with all of the costs of Training Fund
- Even though employees do not contribute financially to the Fund they may have impact on the process of management

There is a possibility of gaining financial support by the entrepreneur who established the Training Fund with help of Labour Fund. Nevertheless this is a really complicated procedure.

Current situation

Within craft institutions (guilds, craft chambers) there were no statistics or surveys made concerning the existence of the training fund in craft enterprises. But as far as we know it is really a minority. It is probably caused by the „soft“ regulation saying that the employer can charge himself with costs for the training but he doesn't have to. Such a situation has to be promptly changed because it doesn't solve any problems in micro and small enterprises.

We should expect other solutions, by the way of changing the regulations concerning labour market institutions and promotion of employment.

In such a situation it is useful to analyze 3 issues:

1. Raising qualification – vocational education requires money
2. Both sides of the educational process should participate in the costs of raising qualifications
3. Government should support this process financially and create conditions for better development of vocational training.

Thesis nr 1

This thesis seems to be obvious and needs only a few explanations. The process of vocational education for employees needs financial assets. It doesn't really matter whether if the training takes place inside of the company or we use some outside training sources.

The first option requires workers with big experience and knowledge who need to be either employed for that purpose or workers who need to be dismissed from other responsibilities for a certain time. It naturally generates costs for the employer

When the employee is sent to training company, he can not do one's duty what creates costs for the employer and employee as well.

Employer costs:

- Replacement of a certain worker
- Costs of the training paid for the outside company
- Potential delegations to the training venue, paid overtime, if the education lasts longer than working hours
- Purchasing of didactic materials, if the process takes place inside the company

Employee costs.

- Losing bonus payment counted on the basis of work effectiveness.
- Additional transport costs if the training takes place in the city of employer
- costs concerning own catering during the period of training, if the training takes place in the city of employer

- loosing of free time that could be divided to education in organized form or individual education
- costs of the certifying exam
- buying guidebooks.

Thesis nr 2

The process of raising professional qualification is profitable for the employer as well as for employees. The employer gets the possibility to recruit workers with better knowledge what refers to more effective work and consequently better products and income. It fully accounts amount of money spent on trainings.

The worker acquires new skills and broadens his knowledge, what gives the possibility of getting higher wages in the company he/she works for, moreover it gives potential possibility to find other, more satisfactory job. But we need to stress that the participation of an employee in the process of vocational education is still the weak point, mostly when we take into account the costs of training. It is caused both by the relatively low level of welfare and law awareness of educational needs. Even though there is no explanation for charging the employer with all of the costs of training process.

Thesis nr 3

Poland is very interested in the level of education among citizens and society as a whole; we strive for crating „ knowledge based society. For that reason, the government has to create the economic and legal system that is conducive for vocational education development.

Purposes and goals of Training Fund

1. Training Fund is a tool that supports the process of vocational education of workers who want/must gain new professional skills
2. Establishing the Training Fund:
 - Fosters the idea of vocational training among employers and employees.
 - Encourages every worker of the company to plan the development of human resources and to treat training expenses as an investment
 - Mobilizes to take active part in the social dialog
 - Helps to prevent workers with useless skills from being dismissed – that will decrease unemployment.
 - Facilitates professional development of employees with the support of European Social Fund
 - Enables to raise the participation of employees in vocational training initiatives.

Assignment of Training Fund

1. Money from Training Fund can be spent on :
 - Actions focused on defining training needs in an enterprise

- Purchasing services on analyzing professional competences, consulting and vocational guidance
- Training and gaining new qualifications (without Safe and Health at Work training because the employer is obliged to organize it)
- Preparing didactic materials such as guide books, multimedia, specialist publications for the company
- New devices essential for trainings in an enterprise.
- Consultations research and analyzes helping with human resources development in the work place.
- Implementation of quality norms in the scope of management, investing in trainings, employees' development (ISO for instance).

There are several issues known as expenses on training and rising professional qualification:

- expenses on in-house trainings - preparation of the training program, didactic materials, essential training devices, honorary for trainers (if the training is run by someone from outside)
- expenses for the outside training companies that help to raise professional qualifications
- costs of guide books and other training materials, in case there are not included in the general price of the training or were not predicted in an in-house training budget.
- travelling costs, accommodation and catering, if the training takes place in other city or if these costs are not included in the training offer
- expenses on approaching the exam that certifies professional qualifications, if these costs are not included in the training offer.

Management of the Training Fund

The employer manages the training Fund together with representatives of employees. Way of realizing trainings from Training Fund should be described in Training Plan prepared by the employer, consulted with worker's representatives.

Realization of the Training Plan and using money from training Fund must be certified with the report and other account documents concerning costs.

Consolidation of training funds of several enterprises

On the basis of common agreement, companies can create a Collective Training Fund, financed from training funds of each company. It is very important from the point of view of small and medium enterprises that sometimes can not afford on spending money on trainings initiatives.

Employer's agreement/treaty regulates the way of management within Collective Training Fund. The employer is obliged to gather all the account documents (or its copies) certifying the realization of trainings from Collective Training Plan

Supporting Training Fund with public

If a company wants to apply for public funds for educational purposes. Training Fund is assumed as an „own contribution”

All of the activities predicted in the Training Plan can be supported by public funds. Public funds are given in the first place for financing the training activities and initiatives in:

- small companies up to 20 workers
- companies that implement new service or production technologies
- companies that implement development of ICT
- enterprises from restructured sectors which try to retrain its workers

7. Summary

The employer who wants to develop his enterprise should always take into account following issues:

1. defining the strategic goal and steps essential to achieve this goal, give a possibility to become successful.
2. investing in human resources and helping employees in self development = fostering the development of our own company
3. planned goals are to be attained only with the staff with high professional qualification
4. all legal documents need to be taken into consideration: formal and non-formal education as well as theoretical and practical skills and knowledge.
5. assessment of employee's qualification is an never ending process – all depends on circumstances such as changing goals by the employer, relevant skills, long life learning
6. last stage of employee assessment depends on the employer