



*Università degli Studi di Firenze*

Dipartimento di Scienze dell'Educazione  
e dei Processi Culturali e Formativi

**ENABLING THE LOW SKILLED  
TO TAKE ONE STEP UP**

*Implementation of Action plan on adult learning*

*Public Open Tender EAC/27/2008*

**Final Report  
Case Study Reports**

**by**

**University of Florence**

**DIE-Deutsches Institut für  
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**IREA-Institutul Român de Educație a Adulților**

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## 0. INTRODUCTION

The Good Practices described more in depth through the Case-Study method have been chosen from the 64 Good Practices included in the Inventory.

The inventory has been set up on the basis of selection criteria which have already been outlined and that could be summed up as follows:

- Distribution per country, in proportion to the inhabitants' number and the effectiveness of the existing measures and provisions (historical experience and ranking in relation to the European benchmark);
- Pertinence to the eleven policy fields defined for their political relevance;
- Continuity of the Good Practice;
- Estimation of a cultural background and link between policy and practice;
- Availability of documentation on results and impact;
- Meeting the criteria of accountability, sustainability and potential transferability.

For the selection of the 14 Good Practices accompanied by the Case Study, the following criteria have been applied:

- Distribution per area (Mediterranean countries, Central European countries, Northern countries – United Kingdom and Ireland included -, Baltic states);
- Duration superior to 24 months;
- Availability of documentation for the analysis of results and impact;
- Relevance in relation to the attainment of EQF2 level.

The Case Studies distribution per area is shown in *Table* no 1

Table 1 – Case Studies distribution per priority and per European regional areas

PRIORITY FIELDS	EUROPEAN REGIONAL AREAS				
	Northern area Denmark, Finland, Estonia, Iceland, Latvia, Lithuania, Norway, Sweden	Central area Belgium, France, Lichtenstein, Luxembourg, Ireland, The Netherlands, United Kingdom, Germany	Southern area Cyprus, Greece, Italy, Malta, Portugal, Spain, Turkey	Eastern area Austria, Bulgaria, Czech Republic, Croatia, FYROM, Hungary, Poland, Romania, Slovenia, Slovakia	Total
1. Upgrading skills to access level 1 and level 2 EQF	<b>Latvia</b> - New solutions for increasing employment possibilities of the former inmates	<b>Ireland</b> -Back to Education Initiative		<b>Croatia</b> - Basic education and vocational training for low-skilled workers; <b>Romania</b> -Second chance for Primary/Secondary Education	<b>4</b>

PRIORITY FIELDS	EUROPEAN REGIONAL AREAS				
	Northern area Denmark, Finland, Estonia, Iceland, Latvia, Lithuania, Norway, Sweden	Central area Belgium, France, Lichtenstein, Luxembourg, Ireland, The Netherlands, United Kingdom, Germany	Southern area Cyprus, Greece, Italy, Malta, Portugal, Spain, Turkey	Eastern area Austria, Bulgaria, Czech Republic, Croatia, FYROM, Hungary, Poland, Romania, Slovenia, Slovakia	Total
2. Learning at workplace for professional qualification and basic education	Norway-Basic competence in working life	Germany-German at the workplace			2
3. Guidance, counselling and validation of informal and non formal learning	Finland-Vocational Training and competence-based qualifications for immigrants Sweden-Guidance, Validation and Preparatory training	France- Defense Preparation Day JAPD	Portugal-Centre for New Opportunities		4

PRIORITY FIELDS	EUROPEAN REGIONAL AREAS				
	Northern area Denmark, Finland, Estonia, Iceland, Latvia, Lithuania, Norway, Sweden	Central area Belgium, France, Lichtenstein, Luxembourg, Ireland, The Netherlands, United Kingdom, Germany	Southern area Cyprus, Greece, Italy, Malta, Portugal, Spain, Turkey	Eastern area Austria, Bulgaria, Czech Republic, Croatia, FYROM, Hungary, Poland, Romania, Slovenia, Slovakia	Total
4. Information, campaigns, network and partnership		<b>The Netherlands-</b> Literacy enhancement in cooperation with social partners; <b>United Kingdom-</b> Information campaign/Adult Learners Week			<b>2</b>
5. Grants, loans and financial incentives			<b>Italy-</b> Individual Credit Card for Training		<b>1</b>



PRIORITY FIELDS	EUROPEAN REGIONAL AREAS				
	Northern area Denmark, Finland, Estonia, Iceland, Latvia, Lithuania, Norway, Sweden	Central area Belgium, France, Lichtenstein, Luxembourg, Ireland, The Netherlands, United Kingdom, Germany	Southern area Cyprus, Greece, Italy, Malta, Portugal, Spain, Turkey	Eastern area Austria, Bulgaria, Czech Republic, Croatia, FYROM, Hungary, Poland, Romania, Slovenia, Slovakia	Total
6. Access to and use of ICT			Spain-Aula Mentor		1
<b>Total</b>	<b>4</b>	<b>5</b>	<b>3</b>	<b>2</b>	<b>14</b>

## **1. UPGRADING SKILLS TO ACCESS LEVEL 1 AND LEVEL 2 EQF**

### **1.1 Croatia, Basic education and vocational training for low-skilled workers**

by Katarina Popović

#### *Problems faced*

The problem faced by Basic Education and Vocational Training for Low Skilled Workers is the low level of education of adults and young people over 15 who have not completed their basic education and are qualified to less than EQF level 2. It builds on a 10 year-long governmental initiative launched in 2003 with the aim of helping adults to complete their elementary education, improve their literacy level, and train for basic occupations leading to a qualification in demand on the labour market, thus enabling them to get a better job.

The “Cards 2004” project started in 2007 following an overall review of the government’s initiative. Public and private training providers (trainers and researchers) were provided with additional expertise to develop a more flexible basic skills programme. This involved developing a new curriculum and providing training for trainers and adult educators. The new programme opens access to around 91,000 adults between 15 and 50 without an elementary education and professional qualification.

#### *Lessons learned and reason that explain the relevance of the Good Practice*

The Croatian Government decided to take measures to change the educational profile by offering better access (second chance or basic skills programme) to basic education to those adults who have not completed basic education and lack adequate qualifications (those with a low level of education - less than EQF level 2). The aims of the Croatian Government’s initiative were:

- to enable adults over 15 to complete elementary education and to raise their literacy level;

- to help unemployed adults be trained in basic occupational skills and thus reduce unemployment.

Besides enabling people to complete basic education, the initiative also offers them the opportunity to undergo vocational training for low-skilled jobs, for which there is a demand in the labour market. The basic education programme provides individual consultation and tuition plus conventional teaching. After completing this part of the programme, participants get a learning voucher for 150 hours of training and they are free to choose the training and the provider.

The Croatian Government's Initiative was recognised as very important, so it was decided to foster its further development by a revision of the project and to provide additional expertise for public and private training providers (trainers/researchers) for the flexible provision of basic skills programmes through the CARDS 2004 Adult Learning Project.

This extension/revision of the government project through CARDS 2004 shows how EU support and European cooperation with the national initiative is providing support for the development of a modern and flexible adult education service in Croatia in line with the labour market demands, the principle of lifelong learning and best practice in EU Member States.

In conclusion, large scale initiative is based on the concept of literacy, introducing basic skills and vocational courses, trying not only to attract people but also to keep them into learning, by offering those different ways and measures that supports access to learning.

#### *Method used*

The initiative has two phases:

Phase 1 - *For Croatian literacy For a Literate Croatia: The Way to a Desirable Future (Literacy Decade in Croatia 2003-2012). Adopted by the Government of Croatia in August 2002, the project started in 2003 as a long-term strategy (end date: 2013) with the following steps: specially designed curriculum, system for data collection on drop-outs and early school leavers, responsible body for the drafting of law on adult education, monitoring, training for teachers, TV programmes for education of adults on national television, books and manuals.*

Phase 2 - *For CARDS 2004: Overview and revision of the project For a Literate Croatia: The Way to a Desirable Future. The project started as the extension of the Croatian national project, based in the Agency for Adult Education, within the CARDS 2004 project, from September 2007 until May 2009. The Cards 2004 was implemented through 6 components*

resulting in the achievements described below: (1) Data and information base is established; (2) Staff and policy are developed; (3) Existing financing arrangements are revised and re-designed; (4) Quality of training programmes and providers is assured; (5) Basic skills programme for adults is improved; (6) Learning campaign is carried out.

#### *Solution adopted to the initial problem*

In the first phase the national project faced some difficulties: fewer than expected participants enrolled, and programmes took insufficient account of the students' previous knowledge and needs, and the need to use teaching methods suitable for adults. As a consequence, the second phase was developed, the CARDS 2004 project analysed the governmental project, made necessary improvements in standards, curriculum training, and combined it with an education campaign aiming to raise public awareness on the importance of lifelong learning and adult education. Improvements were then made in the evaluation methodology for the programme; the standards and benchmarks, methodologies and approaches used; and the expertise of public and private training providers (trainers and researchers) in providing a flexible basic skills programme for adults. A new curriculum was created, more than 100 adult educators trained, a training programme developed, and a manual for teachers and trainers in adult education developed.

#### *Transferability*

The Basic Education and Vocational Training for Low Skilled Workers is a well developed literacy initiative with good standards, methodologies and approaches, and combined with an awareness education campaign on the importance of lifelong learning.

Being a large national initiative, it is focusing on basic skills and vocational training and based on a model of literacy which is designed as an integrative approach of different congruent actions, both by enabling training providers to work in a modern and flexible way with adults in line with the labour market demands, but also by enabling each adult through a training card offered to decide which learning activity is of interest for him, to take over the responsibilities for his own training and needs. This approach overcomes barriers of access to education and facilitates entry to both the labour market and further education.

Transferability in this case is related to the skills that participants gained during the initiative.

#### *Weak and strong aspects*

The initiative “*For a Literate Croatia. The Way to a Desirable Future*” project has met with difficulties, despite the large amount of funding allocated for the project. These difficulties include: the lack of an awareness campaign to inform potential adult learners and the public; a curriculum only slightly modified in comparison to the curriculum used in children’s primary education; the lack of textbooks and other learning materials adapted to adult learners; classes taught by teachers with little or no knowledge or experience in working with adult learners. These difficulties can serve as valuable lessons to bear in mind when implementing similar literacy projects in other European countries. Some identified problems were addressed through the CARDS 2004 Adult Learning project.

Regarding the CARDS 2004 some weak aspects can be considered relating to *Funding* – Low participation rates mean economically unviable class sizes and offering this programme becomes unattractive to training providers. There are problems with the current voucher system since training providers receive reimbursement late. When participants drop out this does not lead to a refund of their voucher for the institution. The withdrawal of funding for travel costs for participants discriminates against those in rural areas where the need for education may be greater. Also, the *Curriculum* – The current curriculum is not suited to the needs of adults and is based on traditional school subjects with no integrated vocational component<sup>1</sup> and *Teacher quality* - the majorities have no specialist andragogical training and a significant number expect the learners to accept the culture of traditional school discipline. For adults returning to learning after, in some cases, a number of years, this is unacceptable.

Besides these aspects, the Basic Education and Vocational Training for Low Skilled Workers – still running - present the following strong points: 4,945 participants have taken part in the programme to date, of whom 638 participated in the vocational training programme, adult learners who complete the programme receive a certificate equivalent to completion of eight grades of primary education which allows them to progress to

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<sup>1</sup> Such weakness is related to the first phase of the Initiative and the Cards 2004 aimed at improving it.

secondary education without obstacles. This approach overcomes barriers of access to education and facilitates entry to both the labour market and further education. In the training phase the participants were given a learning voucher for 150 hours of training (the funding through the voucher system and the related calculation are given in *Table 3*). Such a pathway was adopted because of the low level of participation in adult education and the educational and financial situation in the country.

### *Description of the case study*

#### *Background*

The decision to take measures for the improvement of literacy, educational and qualification levels was motivated by two factors:

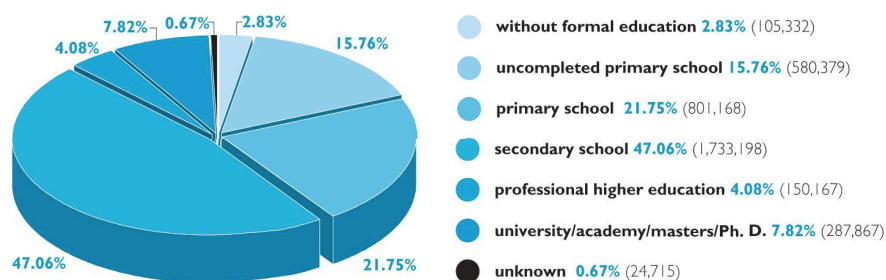
1. by data on the educational profile and employment of population in Croatia:

According to the 2001 census, a total of 685,711 (19.5%) of Croatian residents over the age of 15 have not completed primary education; 105,332 of them (just under 3% of the entire population) have not completed any grade of primary school, 166,371 (4.7%) have completed only 1 to 3 grades, and 444,008 (11.8%) have completed between 4 and 7 primary school grades.<sup>2</sup>

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<sup>2</sup> 2001 Population Census, Data of the Central Bureau of Statistics, 2007, quoted from “The development and state of the art of adult learning and education“, National Report of the Republic of Croatia for the Confintea VI, UNESCO conference.

Figure 1 - Population aged 15 and over according to the level of completed education<sup>3</sup>



Although employment rates have been increasing steadily, they are still below EU levels. In 2006, the employment rate in the 15-64 age group in Croatia reached a yearly average of 55.4%, which was 7.7% lower than the EU-27 average; the employment rate for the 55-64 age group was particularly low, at just 34.3%, in comparison to the 43.5% in the EU-27. Falling unemployment coupled with increasing economic activity rates has produced a decrease in Croatia's ILO unemployment rate from 16.1% in 2000 to 11.2% in 2006, only 3% above the EU-27 average. However, despite falling unemployment, Croatia has persistent long-term unemployment. In fact, 55% of all unemployed people are long-term unemployed. Croatia's long-term unemployment rate of 6.4% (2005) is considerably higher than the EU-27 average of 3.6% with an even higher female long-term unemployment rate of 8.4%.<sup>4</sup>

2. by international developments and recommendations, primarily by the Resolution Nr. 56/116 of United Nations Literacy Decade 2003 – 2012.

This Resolution recognises that literacy is crucial to the acquisition, by every child, youth and adult, of essential life skills that enable them to address the challenges they may face in life. Literacy represents an essential step in basic education, which is an indispensable means to effective participation in the societies and economies of the twenty-first century. The Resolution also supports

<sup>3</sup> Ibidem.

<sup>4</sup> Data of the Central Bureau of Statistics, 2007, quoted from the same source.

the concept of literacy for all in its reaffirmation that literacy for all is at the heart of basic education for all, that creating literate environments and societies is essential for achieving the goals of eradicating poverty, reducing child mortality, curbing population growth, achieving gender equality and ensuring sustainable development, peace and democracy.

This is very much akin to the spirit of article 14 of the International Covenant on Economic, Social and Cultural Rights relating to the right to education. It requires each state party to the agreement which has not been able to secure compulsory primary education, free of charge, to undertake, within two years, to work out and adopt a detailed plan of action for the progressive implementation, within a reasonable number of years, to be fixed in the plan, of the principle of compulsory primary education free of charge for all.<sup>5</sup>

Reacting to the dramatic statistics, following the recommendations from the Resolution of UN Literacy Decade 2003 – 2012 and continuing the overall course of the *reforms* aiming at *integration* into the *EU*, the Government of the Republic of Croatia included primary education and vocational training for initial employment as the **main challenge to solve**, in its *Operational Plan for the Implementation of the Government Programme at the end of 2003*. **To meet this challenge the broad national strategy was initiated, under the title: For a Literate Croatia: The Way to a Desirable Future.** An **Additional problem to solve** was widening access to adult education and training to a broad range of social groups and then to create and implement a functional basic education programme and to develop participant-oriented programmes that also matched the needs of the labour market.

The project is based on several legal documents of the Croatian Government and Ministry of Education.

Beneficiaries may be divided into two groups:

- **Direct beneficiaries - Target group** (potential) consists of 91.000 people aged between 15 and 50, without completed elementary school and /or without qualifications. All Croatian citizens who have not finished primary education can be considered potential

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<sup>5</sup> Preparation, implementation and evaluation of the National action plans as provided for in the Dakar Framework for Action and their relation with the General comments on articles 13 and 14 of ICESCR, Document submitted by UNESCO to the UN Committee on Economic, Social and Cultural Rights in 2002, available at:  
[http://www.unhchr.ch/tbs/doc.nsf/0/f24b82ea249fcb51c1256bb100453b44/\\$FILE/G0240849.doc](http://www.unhchr.ch/tbs/doc.nsf/0/f24b82ea249fcb51c1256bb100453b44/$FILE/G0240849.doc)



users/beneficiaries of the project. However, in the first several years of project implementation, the target group is the age group 15-50, a total of 90.600 persons (13.2% of the population), as well as 791 people aged 10-14. That makes the total size of the target group 91.391, i.e. 13.3% of the population who have not completed primary education.

- **Beneficiaries of the extended** - CARDS 2004 project: Ministry of Science, Education and Sports and the Agency for Adult Education, providers of education and training and around 80 adult educators across Croatia.

**Results to be achieved:**

- *overall goal* – the educational system should be open for all Croatian citizens who have not finished primary education, but in the first several years of project implementation almost 13,3% of the population should be enrolled;
- *general result*, focused on widening access to all adult without adequate education and qualifications, offer a *second chance* and enabling them to upgrade their literacy, key competences and vocational skills;
- *project results*, such as:
  - developing new curriculum for basic education for adults
  - developing curricula for numerous occupational training
  - including all relevant social partners
  - assuring sustainable financing of the programme
  - assuring the implementation of the programme in educational institutions.

The expected *outcome* for the first year of implementation (calculated by the value of the budget and estimated costs of 2,000,00 HRK for one educational term) are 2,450 adult learners enrolled in basic education, and with the estimated costs of around 2,250 – 2,500 HRK per occupational training – some 650 participants trained for basic occupations.

**The measures taken** had various characteristics:

- fostering political dialogue and consensus among the most important partners at all levels (municipalities, local authorities, companies, the Croatian Employment Service, adult education providers (primary and secondary schools, open universities), employer associations, non-governmental and non-profit organisations);
- assuring enough financial support by the state, primarily in the first phase of the project (6,4 millions HRK);

- promoting the project through the media - TV and radio commercials; in the extension phase also via leaflets and local campaigns.

### *Description of the solution*

**Typology:** This is a national project, run by the government and an EU funded project, CARDS 2004, in the category: Basic Education and Vocational Training. This project included political, financial and media measures.

The project provides formal education at the primary level, and an additional optional vocational course for a basic occupation of choice (from a specified list).

Besides enabling people to complete basic education, the project also offers the opportunity to undergo vocational training for low-skilled jobs, for which there is a demand in the labour market. The basic education programme runs through individual consultation and tutorials (60% of all classes are run in this way) plus conventional teaching.

#### **Solution arrangements:**

*Ministry of Education and Science* - The key stakeholder is the Ministry of Science, Education and Sports, the creator of the project. It is responsible for the adoption of the programmes for vocational training (the right to certification), financing the formal educational institutions taking part in the programme.

In terms of the programmes for occupational training, targeting particular groups within the society, the *Croatian Employment Service* appears also as a key stakeholder. It had the role of financing the programmes which meet labour market shortages. However, for some of the programmes, participants contribute part of the course fee.

*The Adult Education Agency* – The extension of the project, [CARDS 2004], is based in the Adult Education Agency, and the role of Agency and the *Delegation of the European Commission to the Republic of Croatia* within the CARDS 2004 project was to analyse the project, to identify information gaps, weaknesses of standards, methodologies and procedures used in the basic skills programme for adults provided within the *For a Literate Croatia – The Way to a Desirable Future* project, and to make necessary improvements, as well as to improve the expertise of public and private training providers (trainers/ researchers) for the flexible delivery of the basic skills programme for adults.

In the delivery stage, many other *stakeholders* were involved. Local authorities and institutions accredited for the primary education of adults were given the role of project facilitators. The *delivery partners* involved around 60 education institutions in Croatia.

The measures were aimed primarily at people with a low level of education (less than EQF level 2), who wanted to re-enter the education process and to get an initial occupational training. An important part of the solution was the decision to organise all the measures within the system of formal education provision so that the knowledge and skills obtained were recognised in the Croatian certification system. Adult learners who complete the programme receive a certificate equivalent to completion of eight grades of primary education which allows them to progress to secondary education without obstacles. This approach is intended to overcome barriers of access to education and to facilitate entry to both the labour market and further education. In the training phase the participants were given a learning voucher for 150 hours of training. Such a **pathway** was adopted because of the low level of participation in adult education and the educational and financial situation in the country, both of which were obstacles to the implementation of the project and demanded action to motivate participation in the programme. Furthermore, it was felt that, the chosen pathway should respond not only to the needs of adults but also to the needs of the labour market by offering the courses for the most needed occupations. In order to increase the horizontal and vertical mobility of adult learners, both part of the programme (basic education and vocational training) should lead to state recognised certificates.

Organisational activities included preparation for delivery and project promotion using TV and radio commercials, as well as a leaflet aimed at the wider public. The leaflet contained information on who adults should contact if they wanted to participate in the project. A brochure was prepared for potential partner institutions. The responsibility for motivating potential adult learners to participate in the project is, however, left primarily to the local state administration offices and their education units, in cooperation with programme providers, companies and the CES.

## *Methodology*

For every stage of programme preparation and delivery there was a set of methodological requirements and characteristics. These are laid out within the two main phases of the projects:

**PHASE I.** *For Croatian literacy For a Literate Croatia: The Way to a Desirable Future (Literacy Decade in Croatia 2003.-2012).*

*Adopted by the Government of Croatia in August 2002, the project started in 2003 as a long-term strategy (end date: 2013).*

The steps for the first phase were:

- develop curriculum for the basic adult education,
- name the responsible body for the coordination and implementation of the programme,
- establish the system for the collection the data of drop-out and early school leavers,
- name responsible body for the drafting of law on adult education and National programme for adult education,
- prepare the set of standards for the financing,
- modify adult education documentation for the monitoring of different phases of the programme,
- organise the training for the teachers, trainers and others involved in the programme implementation,
- prepare TV programmes for education of adults at national television,
- prepare new books and manuals for the programme implementation and adopt the existing ones,
- change the related paragraphs of the law on elementary schools in order to support basic education of adults.

The project provided formal education at the primary level and an optional vocational course for a vocational training for low-skilled jobs. The Ministry of Education and Sports has, for the purpose of the project, created a curriculum for the primary education of adults.

The methodological requirements for the curriculum development were:

- Curricula should act only as a framework, the actual delivery should include the previous knowledge of participants, their needs and capacities and development of new operational programmes;
- The educational process should include: examinations, individual consultation and tutorials (60% of all classes are run in this way), conventional teaching.
- 10% of the programme could be allocated for the compensation classes

- Especially in terms I and II (semesters) the experience of the adult learners should be considered and their motivation for further education increased;
- The programmes from terms III to VI are adapted programmes of the current grades 5 – 8 of elementary school;
- Participants enter at the educational term that follows their previous completed elementary school grade;
- At least 60% of overall number of classes should be allocated to the individual consultation and teaching;
- The organisation and delivery of the instruction should be flexible and adapted to the learners;
- Vocational training is organised in the institutions that run accredited programmes and in parallel with the basic education if it suits the participants.

The programme (curriculum) consists of six terms, each lasting 18 weeks. The first (I) and second (II) terms are equivalent to the level of the first four grades of primary education. These terms are designed for adults who have not completed the first four years of primary school. The subjects and number of classes are as follows:

*Table 1 - For a Literate Croatia project curriculum – terms I and II<sup>6</sup>*

	Subject	Number of classes (hours) by term	
		I	II
1.	Croatian Language	120	108
2.	Mathematics	60	72
<b>Total:</b>		<b>180</b>	<b>180</b>

Terms three (III) to six (VI) match the level of the remaining four years of primary education and are, therefore designed for adults who have completed only the first four years of regular primary education.

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<sup>6</sup> The Agency for Adult Education. (2008). The development and state of the art of adult learning and education. National Report of the Republic of Croatia for the Confintea VI, Hamburg: UNESCO. Available at: [www.unesco.org/uiil/en/UILPDF/nesico/confintea/Croatia.pdf](http://www.unesco.org/uiil/en/UILPDF/nesico/confintea/Croatia.pdf)

Table - 2 For a Literate Croatia project curriculum – terms III to VI<sup>7</sup>

	Subjects	Number of lectures (hours) by term			
		III	IV	V	VI
1.	Croatian Language	90	90	72	72
2.	Art				12
3.	Music				12
4.	Foreign Language	36	36	36	36
5.	Mathematics	72	72	72	72
6.	Biology			18	18
7.	Chemistry			18	18
8.	Physics			18	18
9.	History	18	18	18	18
10.	Geography	18	18	18	18
11.	Civic Education				18
12.	Technical Culture and IT		24	24	24
13.	Physical Education				18
	<b>Total:</b>	<b>234</b>	<b>258</b>	<b>294</b>	<b>354</b>
	<b>Optional Courses</b>				
14.	Training programme				<b>150</b>

After completing this part of the programme, participants get a learning voucher for 150 hours of training and they are free to choose the training and the provider. After the completion of vocational training the participants hand over the learning voucher to the provider, who then cashes the voucher.

The financial value of the learning voucher was calculated on the basis of the following *Table*:

Table 3 - Calculation of the learning voucher

	Grade	Educational term	Number of hours	Number of subjects	Consultation and examinations	Consultation and instruction	Regular instruction
1	VIII	VI	354	13	1.600	2.500	400
2	VII	V	294	9	1.200	2.100	2.900
3	VI	IV	276	7	1.000	1.900	2.700
4	V	III	252	6	900	1.800	2.500

<sup>7</sup> Ibidem.

5	III, IV	II	180	3	500	1.200	1.800
6	I, II	I	180	2	500	1.200	1.800
Average price for the educational term					950.00	1.900,00	2.666,67

*\*All prices in HRK*

Among the profiles offered within the vocational trainings are: armourer, tool honing worker, welder, floor layer, insulation worker, construction glazer, dredge operator forklift operator, assistant cook, assistant baker, goat keeper, crane operator, sea fishermen, woodworker, road worker, mushroom grower, builder assistant

The curriculum is adjustable to the needs and previous knowledge of adult learners. As can be seen, classes for the training programmes for basic occupations are included in the timetable for the terms V and VI; one of the programmes offered can be chosen and completed in parallel to primary school education. Total programme duration is three years. The additional, parallel training programme covers a total of 150 hours.

The project is funded entirely by the state budget and the completion of primary education, as well as vocational training, is free of charge for the participants.

**PHASE II.** *For CARDS 2004: Overview and revision of the project For a Literate Croatia: The Way to a Desirable Future.*

*The project started as the extension of the Croatian national project, based in the Agency for Adult Education, within the CARDS 2004 project, from September 2007 until May 2009.*

The second phase of the project, funded by the European Union, included already involved Croatian partners, and was implemented by European partners: Aarhus Technical College Denmark in consortium with PEM Germany, University of Jyväskylä Finland and EPRD Poland.

The “extension” *actually* formed part of the CARDS 2004 Adult Learning Project which is the first project designed for providing institutional support to the adult education system in Croatia. The overall objective of the project is to further a modern and flexible concept of adult learning for Croatia in line with the new labour market requirements, the lifelong learning approach and EU best practice examples. The project consists of 6 components, component 5 being the most relevant for this project. This component refers to the improvement of the basic skills programme for adults, with the intention of identifying information gaps, weaknesses of standards, methodologies and procedures used in the *For a Literate Croatia. The Way to Desirable Future*

project's provision, as well as improving the expertise of public and private training providers (trainers/researchers) for the flexible provision of the basic skills programme for adults.

The path to the desirable future is, for Croatia, the path to the Lisbon goal of a knowledge-based economy and active citizenship. So, the revision of the project was inspired also by striving to narrow (and even to close) the *gap* between Croatian educational reality and EU benchmarks, trends and achievements. The recommendations from the main EU documents on lifelong learning were also guidelines for the revision of the project.

Delivery of the *For a Literate Croatia. The Way to a Desirable Future* project has met with difficulties, despite the large amount of funding allocated for the project. These difficulties include: the lack of an awareness campaign to inform potential adult learners and the public; a curriculum only slightly modified in comparison to the curriculum used in children's primary education; the lack of textbooks and other learning materials adapted to adult learners; classes taught by teachers with little or no knowledge or experience in working with adult learners. These difficulties can serve as valuable lessons bear in mind when implementing similar literacy projects in other European countries. Some identified problems were addressed through the CARDS 2004 Adult Learning project.<sup>8</sup>

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<sup>8</sup> European Commission, Directorate-General for Education and Culture. (2008). Peer learning activity on adult literacy. Summary report. Dublin: EC. Available at: [www.kslll.net/Documents/PLA\\_Adult%20literacy\\_Jan.%2008\\_%20Final%20report.pdf](http://www.kslll.net/Documents/PLA_Adult%20literacy_Jan.%2008_%20Final%20report.pdf)



Table 4 - Reasons for dropping-out of this programme and future planning

Items	$\Sigma$	%
Lack of time	4	14.8
Lack of money	3	11.0
Seasonal job	--	0
Personal reasons	8	29.6
Same bad classes and teachers again	2	7.4
Do not know how to learn	1	3.7
Teachers didn't see my difficulties	--	0
Bullied by co-students	--	0
Subjects too difficult for me	1	3.7
Lectures didn't connect with real life	--	0
It was too difficult	3	11.1
Other reasons	5	18.5
	<b>27</b>	<b>99.9</b>

Cards 2004 was implemented through 6 components resulting in the achievements described below: Component 1: *Data and information base is established*; Component 2: *Staff and policy are developed*; Component 3: *Existing financing arrangements are revised and re-designed*; Component 4: *Quality of training programmes and providers is assured*; Component 5: *Basic skills programme for adults is improved*; Component 6: *Learning campaign is carried out*.

A working group was established in order to reach a better and deeper understanding of the literacy project, *For a Literate Croatia*. It was essential for the group to have a good and detailed understanding of the current position, the characteristics of learners, the issues arising from the first years of the implementation of the project from the point of view of the learners, the training providers, the relevant public authorities as well as from employers, labour unions and the Croatian Employment Service.

The CARDS 2004 project *Overview and revision of the project For a Literate Croatia: The Way to a Desirable Future (a decade of literacy in Croatia 2003-2012)* (Component 5) analysed the project, made necessary improvements in standards, methodologies and approaches, and combined it with an education campaign aiming at raising public awareness on the importance of lifelong learning and adult education. Three main areas were methodologically developed and implemented, with expected outcomes, which were completely reached. These were:

- develop the methodology for the evaluation of the programme for basic education of adults;
- revision of the *For a Literate Croatia - The Way to a Desirable Future* project;
- revision of the curriculum for the basic education of adults.

A survey was undertaken by all of the working group members who were drawn from the various organisations and the sample of respondents (selected by the working group using the local knowledge and experience of the members) was made up of the following groups: learners: enrolled and participating in the Literacy project, who had dropped out of the programme before completion, successful participants, eligible people not enrolled; teachers, training provider institutions, public authorities: relevant ministries, regions and municipalities, agencies, employment services, Chamber of Trades and Crafts and the Chamber of the Economy, labour unions.

The entire Phase II run within the CARDS programme included the following steps, measures and methodologies:

- develop the methodology for the evaluation of the *For a Literate Croatia* project, choose the appropriate *method for assessment and evaluation*, and revision of the curriculum for basic adult education;
- develop a comprehensive methodology for evaluation of the basic skills programme for adults, carry out an initial analysis and assessment of the information relating to the *For a Literate Croatia* project and define the aspects of the project that need reviewing;
- develop the first draft methodology for the *review* of all relevant aspects of the project, including the financial mechanism and curriculum;
- design the methodology for evaluation and assessment of the project in more detail - structured interview, questionnaire, targeted SWOT analysis and instruments for the collection of data relevant for various research target groups: labour market, government institutions, service providers and trainers, as well as individual approaches to various groups of participants in the basic adult education programme, and their integration into the strategy as a whole;
- collect data for the *evaluation of the implementation* of the *For a Literate Croatia* project from all involved stakeholders, establish smaller working groups by regions and by research target groups, agreement on time framework, sources of data, systematization of obtained data related to quantitative analysis;

- analyse the data obtained in the surveys (quantitative data and samples of qualitative data), final report and final recommendations;
- *train the adult educators* (twenty-one experienced adult educators were trained in this phase);
- *develop training programme and teacher guidelines* that will be used in adult education programmes and draft the plan for the delivery of regional training courses for up to 100 adult educators;
- *continuing training of adult educators*, activities: implementation of training courses and the development of personal development and professional work guidelines, presentation practice, application of the theories of learning, learning styles and teaching methodologies; the materials presented by participants discussed, evaluated and improved. *The evaluation* and improvement should also serve as examples of assessment and feedback in pedagogical practice;
- further training of adult educators, activities: analysis of the implications of the Adult Education Act, using methods and organisation in line with adult learners' needs (in order to *increase users' involvement and participation*), using IT for learning and teaching, time management etc;
- finalise framework curriculum for basic adult education (verify goals and competences that the participants will gain by subject areas);
- define *methodology and strategies for evaluation and assessment* of entry competences and learning outcomes;
- define mobility towards labour market training programmes.

### *Results and impact analysis<sup>9</sup>*

The project addresses the problem of implementing the basic skills improvement programme in the following areas (this section also presents *the lessons learned* from the first phase of the project):

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<sup>9</sup> Detailed findings and conclusion are described in the document: Working group members in component 5 in cooperation with the consultants Blum, R. & and Bennett, S. (2009). Review of the Project „For a Literate Croatia: The Way to a Desirable Future – the Decade of Literacy in Croatia 2003 – 2012“. Zagreb: Adult Learning CARDS 2004 (EuropeAid/120956/D/SV/HR). See: [www.aoo.hr/Documents/CARDSRezultati/CARDS\\_results\\_EN.html](http://www.aoo.hr/Documents/CARDSRezultati/CARDS_results_EN.html)

- *Definition of “literacy”*– moving from the traditional method of measuring literacy according to the number of years spent in school to the development of criteria for functional literacy and measuring competences. The definition of literacy in terms of functional literacy includes new skills and competences required to match the demands of a complex society and economic changes.
- *Funding* – Low participation rates mean economically unviable class sizes and offering this programme becomes unattractive to training providers. There are problems with the current voucher system since training providers receive reimbursement late. When participants drop out this does not lead to a refund of their voucher for the institution. The withdrawal of funding for travel costs for participants discriminates against those in rural areas where the need for education may be greater.
- *Curriculum* – The current curriculum is not suited to the needs of adults and is based on traditional school subjects with no integrated vocational component. The curriculum is “*one size fits all*”; there is no opportunity to personalise the curriculum to meet individual interests and needs. The more successful training providers make the adjustments they can in order to try to overcome this difficulty.
- *Teacher quality* - There is a lot of good will and commitment among the teachers involved in the programme. However, the majority have no specialist andragogical training and a significant number expect the learners to accept the culture of traditional school discipline. For adults returning to learning after, in some cases, a number of years, this is unacceptable. The experience of second chance education needs to be very different from the first experience of school that led to the initial dropping out.
- *Social issues* – related to the *individual learner* (whose motivation has to be increased) and *other stakeholder organisations* (ensuring their active involvement).

Since the project had several “sides” or aspects and two big phases, the *results* can be presented and interpreted on several levels or aspects relating to:

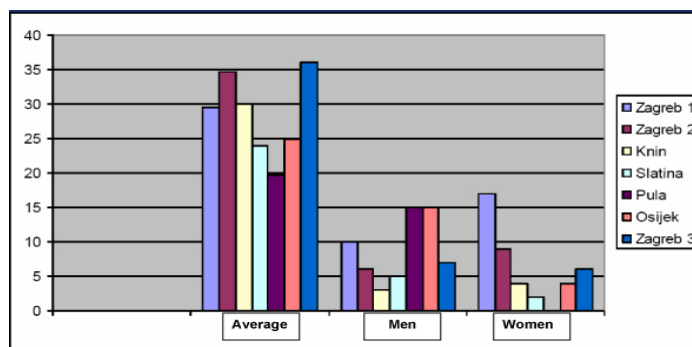
1. final beneficiaries;
2. international cooperation in methodology development for the planning and implementation of the project;
3. capacity building and sustainable opening up the educational system for adults who need to increase their level of education and qualification, the broader impact on education and employment.

### ***Final Beneficiaries***

At the level of final beneficiaries 39 institutions (13 primary schools, 21 open universities, 1 secondary school and 4 other institutions) took part in the project in 18 counties all over Croatia and in the city of Zagreb, with more than 4,945 participants so far (according to Croatian Agency for Adult Education data<sup>10</sup>) in the whole programme and 638 in the vocational training programme (15.05% of overall number).

- among the participants there are around 30% women;
- in the targeted age group there are 93.1%, as planned, and the highest number of participants is among the youngest age group (15-29);
- the lowest number of participants (13.34%) is in the age group 30-39, because this group has the lowest number of people without a completed elementary school education. Bearing this in mind, their participation is at satisfactory level.

*Figure 2 - Project participants according to age (average) and gender (men; women) in various counties and in Zagreb<sup>11</sup>*



A data base of participants has been created within the Central Bureau of Statistics of the Republic of Croatia<sup>12</sup> and is used to monitor data on adult education.

<sup>10</sup> Matković, J. & Štrkalj, D. (2009). CARDS projekt 2004: Obrazovanje odraslih. Komponenta 5. Trening trenera. Poboljšanje programa osnovnog obrazovanja odraslih. Available at: [www.aoo.hr/Documents/7\\_komponenta%205%20-\\_Matkovic\\_Strkalj.pdf](http://www.aoo.hr/Documents/7_komponenta%205%20-_Matkovic_Strkalj.pdf)

<sup>11</sup> Ibidem.

<sup>12</sup> [www.dzs.hr/default\\_e.htm](http://www.dzs.hr/default_e.htm)

Table 5 - Reasons for the participation in the programme<sup>13</sup>

EDUCATION will enable me to:	Σ
Gain respect	5
Find a job more easily	11
Be better in my job	-
Keep my job	4
Have personal satisfaction	3
Put my children through school	3
Something else	1
Don't know	5
Σ	32

### ***International Co-operation***

The overview and revision of the project *For a Literate Croatia* also offered some valuable results related to the methodology developed and to international cooperation, that may have implications for further EU projects in the region.

- *For the role of European support and European cooperation:*
  - CARDS 2004 showed how European projects and cooperation could help to overcome the weaknesses of the national activities and make improvements to ensure good practice;
  - The revision of the literacy initiative by CARDS 2004 demonstrates how EU support and European cooperation in national initiatives in the field of adult education, can provide support for the development of a modern and flexible adult education in Croatia in line with labour market demands, the principle of lifelong learning and best practice of the EU Member States;
  - CARDS 2004 showed the best way of combining European and local expertise and the best use of the potential of both for the sake of final beneficiaries;
  
- *In terms of project planning and revision, CARDS 2004 (Component 5) resulted in the following important achievements:*

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<sup>13</sup> Working group members in component 5 in cooperation with the consultants Blum, R. & Bennett, S. (2009). Review of the Project „For a Literate Croatia: The Way to a Desirable Future – the Decade of Literacy in Croatia 2003 – 2012“. Zagreb: Adult Learning CARDS 2004 (EuropeAid/120956/D/SV/HR). See: [www.aoo.hr/Documents/CARDSRezultati/CARDS\\_results\\_EN.html](http://www.aoo.hr/Documents/CARDSRezultati/CARDS_results_EN.html)

- identified information gaps, weaknesses of standards methodologies and procedures used in the provision of the national basic skills programme for adults,
  - improved the expertise of public and private training providers (trainers/researchers) for the flexible provision of basic skills programme for adults,
  - developed examples for a modular approach to the curriculum focused on the successful implementation of evaluation and assessment of participants' existing competences, basic abilities and potentials and interests,
  - integrated comments and proposals into the framework proposal for curriculum revision,
  - finalised approaches and aspects of the implementation of the curriculum for basic adult education,
  - outlined proposals for the improvement of public and private training providers in order to ensure that programme delivery can be as flexible as possible.
- *Through the set of measures for delivery, the revision ensured:* accessibility to the project throughout Croatia, respect for the background and needs of adult learners, implementation of educational plan and programme, an appropriate curriculum, issuing certificates, the co-operation of the local community with the national employment office, standards of instruction and qualification, financial mechanisms.

One of the important results related to this aspect is a set of key messages, followed by suggestions given for almost every relevant aspect of this project, but also for any other project with similar goals. An example of such a set of messages,<sup>14</sup> related to participants is:

1. Support for participants in terms of financial support for learning materials and travel costs is important to ensure they complete the course.
2. Finding a job at the end is a key indicator and which must be used in future PR. All success stories of completers who find employment at the end should be shared and used for publicity purposes.

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<sup>14</sup> Ibidem.

3. Adults deserve high quality education with well qualified teachers in a pleasant and suitable learning environment.
4. Government allocation of an adequate budget to support development is crucial.

Some concrete recommendations for the future activities or projects in this field have been made, such as:

*Table 6 - Suggestions for avoiding negative experiences*

Suggestions for avoiding negative experiences	Number of responses
Adapt the curriculum into modules and individualise it to make it interesting	7
More suitable materials	6
Emphasise the importance of learning for self-respect	4
Explain the importance of education for employment	4
Liaise with employers to adjust work hours and encourage the participants	4
Teach them how to learn	3
Develop good communications with them – show you care. Teacher should be on time for class.	4
Roma assistant in class. Roma don't understand Croatian language	2
Change the financing; include learning materials	2
Better co-ordination of the project	1
Include an educational psychologist	1
Teach children in schools better	1
Participants should pay and work harder	1
Smaller groups	1
Different regulation by law	1
Teach them about health and fitness	1



Table 7 - Suggestions for increasing the number of participants and decreasing the number of drop-outs

Suggestions for increasing the number of participants	Number of responses	Suggesting for decreasing the number of drop outs	Number of responses
More PR	12	More PR	2
Raise awareness of the need to finish school to get employment	5	Raise awareness of the need to finish school to get employment	8
Provide transport, especially for Roma	4	Treat participants with respect, avoid negative experiences	6
Engage the CES to do a survey	2	Cut illegal work	2
Legislation to force employers to support education and training	2	Legislation to force employers to support education and training	2
Encourage employers to employ older people	2	Shorter programme. Adjust to their needs	2
Stimulate the participants and avoid previous bad experiences of school	2	Provide transport, and free books	1
Flexible hours and availability of teachers to give advice	2	Promote VET	1
Tax incentives for employers	1	Enforce obligatory elementary school	1
Cut illegal work	1	Charge drop-outs a fee	1
Contact construction companies to reach the most uneducated	1	Cancel social support to Roma	1
Involve more institutions	1		
Recognize functional literacy	1		
Make courses shorter and provide learning materials, transport and a snack	1		

### ***Capacity Building, Widening Access and Sustainability***

Among the long-term measures and achievements, related to capacity building, ***widening access to*** educational system and to sustainability, the following results can be mentioned:

- 20 adult educators trained as adult educator trainers and 126 adult educators were trained in 60 hour regional workshops;
- Training programme and teacher guidelines have been developed;
- Detailed teaching plan and programme produced for each single educational level (and for each subject) and developed financial mechanisms for each level of the programme and for vocational courses (The Ministry is covering the costs for schooling and labour offices those of training required by the labour market);
- Education system methodology, questionnaires and other instruments used for the evaluation and monitoring are available on the project CD Rom. An example is:

Table 8 - Important indicators for the assessment of the literacy project<sup>15</sup>

What indicators will measure the success of the literacy project?	Number of responses
Participants find jobs at the end	7
Transport is provided	5
Good publicity	6
Happy, well paid teachers with andragogical experience	4
Happy participants who complete the course	3
Government funding increased	2
Quality education in a nice environment	1
Regional and local co-operation	1
Programme development: functional literacy	1
More literate people	1
Curriculum better suited to adults	1

- A complete Manual for Training the Teachers in the Adult Education System has been developed,<sup>16</sup> containing three group of modules:
  - *Core modules* (Group process module, Octopus module, Spine module, Training needs module);
  - *Content modules* (Teaching and learning modules, Modules on assessment and evaluation, Modules on communication, Modules on implementation);
    - *Independent learning modules* (Project learning module);
    - Additional section on *Reporting and quality assurance*;
 These modules are seen by the working group as a curriculum in progress, needing to be adapted constantly to the changing needs of the target groups.
- The project brought various social partners together and increased the responsibility of the local authorities and the counties for the adult education and training.

The overall funding secured in the state budget reached HRK 1,200,000 in 2003, HRK 10,000,000 in 2004, HRK 5,300,000 in 2005, HRK 6,000,000 in 2006 and HRK 6,550,000 in 2007, plus the investment in the

<sup>15</sup> Working group members in component 5 in cooperation with the consultants Blum, R. & and Bennett, S. (2009). Review of the Project „For a Literate Croatia: The Way to a Desirable Future – the Decade of Literacy in Croatia 2003 – 2012“. Zagreb: Adult Learning CARDS 2004 (EuropeAid/120956/D/SV/HR). See: [www.aoo.hr/Documents/CARDSRezultati/CARDS\\_results\\_EN.html](http://www.aoo.hr/Documents/CARDSRezultati/CARDS_results_EN.html)

<sup>16</sup> Working group members in component 5 in cooperation with the consultants Blum, R. & and Bennett, S. (2009). Manual for Training the Teachers in the Adult Education System. Zagreb: Adult Learning CARDS 2004 (EuropeAid/120956/D/SV/HR). See: [www.aoo.hr/Documents/CARDSRezultati/CARDS\\_results\\_EN.html](http://www.aoo.hr/Documents/CARDSRezultati/CARDS_results_EN.html)

CARDS Component 5 (the total value of all 6 components is €1.5 million). This might look high for the number of participants involved. But one should bear in mind following:

- This is a long-term project and the number of participants is rising.
- As a long-term project, it is not a palliative measure, but aims to make changes in the educational system; the redevelopment of the programme will facilitate increased general participation and success of the adult participants.
- The capacity building measures (trained adult teachers, developed programmes and materials, supported providers of adult education) will have a long-term impact on the Croatian adult education system.
- The fact that the project was initiated and supported by the Ministry of Education assures the sustainability and continuity of the programme and long-term use of the results.
- The involvement of all relevant social partners (especially the Employment Office and educational providers) assures sustainability of the programme.
- The fact that the EU supported the project with expertise and partly carried it out, sets the project in the broader European context, helping to modernise and update adult education in Croatia in order to meet modern European standards, achieve the EU benchmarks and Lisbon goals.

There is a series of further measures and activities planned that should support further implementation and sustainability of the *For a Literate Croatia* project. The Strategy for Adult Education has been adopted, as well as the Action Plan for its implementation. Furthermore, the Adult Education Act (passed in February 2007) states that adults will be given an opportunity to demonstrate their knowledge, skills and abilities, no matter where and when acquired, by taking an examination. This will help adult learners to formalise their knowledge, skills and abilities acquired through non-formal and informal learning and provide them with recognised certificates which will enable them to progress through the formal education system, as well as having better opportunities in the labour market. This will be supported by the Croatian Qualifications Framework, which is about to be developed. In addition, the Agency for Adult Education is organising and planning a variety of activities that will support the future delivery of the *For a Literate Croatia* project (for example providing andragogical training for teachers and trainers in adult education).

The *For a Literate Croatia* project and its revision and review by the CARDS 2004 project offered number of lessons learned, arising from the difficulties inevitable in such an ambitious, long-term project, which can serve as valuable experience as to what to be mindful of when implementing similar literacy projects in other European countries.<sup>17</sup> This makes it, on a national level, the most important initiative in enabling people “to go one step up”.

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<sup>17</sup> European Commission, Directorate-General for Education and Culture (2008). Peer learning activity on adult literacy. Summary report. Dublin: EC. Available at: [www.kslll.net/Documents/PLA\\_Adult%20literacy\\_Jan.%2008\\_%20Final%20report.pdf](http://www.kslll.net/Documents/PLA_Adult%20literacy_Jan.%2008_%20Final%20report.pdf)

## 1.2 Ireland, Back to Education Initiative

by Mary Kett-Further Education Development Coordinator Department of Education and Science

### *Problems faced*

*The overall aim of this initiative is to increase the participation of adults with less than upper secondary education in a range of flexible part-time learning opportunities and to facilitate their access, transfer and progression to other education and employment pathways.*

The *Back to Education Initiative (BTEI) (Part-Time Programme)* is one of a number of large scale national educational initiatives, implemented by the Irish Government after the publication of the *White Paper on Adult Education* in 2000, and reflecting priorities set out in that document for the development of adult education. These initiatives were designed to respond to the problem of low educational achievement of some groups of Irish adults, due to the relatively late introduction of free post-primary education in Ireland. The Initiative is designed to overcome the inflexibility of the existing further and adult education system by providing adults with the opportunity to combine education with other family and work responsibilities, as well as offering provision in venues and locations that suit the learners.

The initiative aims to raise the participation level of vulnerable groups who have traditionally been slow to respond to adult learning provision. These target groups include the long-term unemployed, lone parents, people with disabilities, ex-offenders, as well as those with addiction problems, homeless people, Travellers, and migrants.

### *Lessons learned and reasons that explains the relevance of the Good Practice*

The BTEI is viewed as a positive development, despite challenges and a number of system constraints. **The flexibility of the funding mechanism** which has led to a significant expansion in the range of learning options available is particularly emphasised. New provision and the **extension of**

**existing programmes outside mainstream institutional settings and in more isolated rural and community based locations** are also highlighted. The programme has improved the **participation of disadvantaged groups** and **allows progression** to accredited programmes from Adult Literacy and Community Education for students unable to commit to full-time training. **The emphasis on national certification** has also increased the currency of provision on offer.

The programme has also resulted in enhanced cooperation between statutory providers and the voluntary and community sector.

The Back to Education Initiative provides an example of a national programme with a clear focus on:

- Adults with low levels of education, particularly those from specified target groups.
- Programmes leading to certification on the National Framework of Qualifications.
- Modular part-time programmes enabling adults to build qualifications over time.
- Partnership and locally based area consultation, enabling outreach to non-traditional locations.

#### *Method used*

The Department of Education and Science provides funding to providers on an annual basis to enable them to offer courses leading to awards at Levels 1-6 on the National Framework of Qualifications. The funding mechanism requires providers to offer a specified number of contact hours to participants, up to a maximum of 400 hours per year. Providers are free to prioritize the courses they offer within the overall budgetary limits specified, in locations and to target groups identified on an annual basis. These priorities may change or shift on an on-going basis.

Funding criteria reflect a set of broadly agreed principles including learner-centredness, equality, accessibility and inclusiveness. Applications are also required to demonstrate innovation as well as local consultation and area-based approach. All providers must provide evidence of having agreed their quality assurance procedures with the Further Education and Training Awards Council.

Providers are also advised to prioritise the offer of integrated packages of modules leading to certification at Levels 3 and 4 on the National Framework of Qualifications. While provision may include courses at Level 5 and above, there is an upper level of 30% set for the enrolment of participants with upper secondary education. Appropriate supports are also required to be in place in cooperation with the Adult Literacy Service and the Adult Guidance Service. There is also a strong focus on enabling learners to participate in courses which lead to whole awards over time, for example over a two to three year period.

Courses provided include basic education, general skills and vocationally related programmes, offered in a modular basis to enable participants to build towards full awards over time.

#### *Solution adopted to the initial problem*

Since its launch in 2002, the BTEI has made a major contribution to building the capacity of the adult education sector<sup>18</sup> to address the learning needs of adults with low levels of qualifications. Part-time programmes under the BTEI has built on existing full-time and part-time further and adult education provision funded by the Department of Education and Science. In recognition of the Community Education Movement's contribution to the development of provision for disadvantaged groups funding has also been provided by the Department to an average of 50 local Groups annually. **27,000 people participated in the Initiative in 2008, with 37% gaining full or partial certification through the National Framework of Qualifications. 27% progressed to other further education and training or employment, and a further 35% continued courses through the Initiative.**

#### *Transferability*

BTEI is a large scale initiative with political will and has particular importance in relation to the introduction of greater flexibility into the Irish education system, the promotion of greater synergy between different

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<sup>18</sup> It refers to the local education authorities or providers.

forms of provision and facilitating adults to combine family, personal and work responsibilities with learning opportunities.

The detailed practical guidelines developed by the Department of Education and Science in collaboration with Irish providers would be of relevance in other settings.

These guidelines include strategies to facilitate positive learning outcomes through attainment of certification and progression to further opportunities (*Certification Matters – Guidelines to Support Certification Outcomes through BTEI Funded Provision*). A further set of guidelines promote the development of outreach provision outside mainstream institutions (*Widening Participation - Guidelines for Effective Planning and Delivery of Back to Education Initiative Outreach Provision*).

Three other publications include guidelines on supports for learners with literacy difficulties, developing programmes for learners with disabilities and increasing men's participation.

#### *Weak and strong aspects (Achievements and challenges)*

The main achievement of the project is the delivery of a broad range of programmes leading to the attainment of national certification up to NFQ Level 5 (EQF Level 4) over time. A second achievement is the use of a wide range of locations, appropriate to the particular circumstances of learners.

Challenges and strong points: while the data collected provide a comprehensive analysis of participants' profile and attainment on an annual basis, currently there is no capacity to track achievement longitudinally because of the absence of a management information system at national level. Secondly, a formal external evaluation or impact study of the Back to Education Initiative (Part-Time) has also not yet taken place.



## *Description of the case study*

### *Background*

Adult education policy in Ireland<sup>19</sup> promotes lifelong learning as the foundation for initiatives designed to address low levels of literacy and poor education levels, particularly among older adults, which continue to pose fundamental challenges to maintaining competitiveness and growth and promoting social inclusion.

Technology, globalisation and demographic change, as well as the need to promote competitiveness and social inclusion, are all driving forces which make increased investment in adult learning a necessity. As Europe has moved into the knowledge society, its citizens must learn to live positively with diversity and adapt rapidly to the demands of an ever changing labour market and knowledge economy.<sup>20</sup> However, social inclusion and active citizenship are also dependent on the competences needed to participate in, and make a contribution to, not only economic but also social life: lifelong learning has to become a reality for all citizens.

The *OECD International Adult Literacy Survey* focused public attention and urgency on the adult literacy issue in Ireland. On a scale of 1-5 the survey, which was carried out in Ireland in 1995, found that about 25% of the Irish population scored at the lowest level (Level 1) in the document scale with a further 32% at Level 2. The survey also drew attention to:

- The substantially lower levels of literacy in older age groups.
- The close links between lower scores and lower educational levels.
- An association between lower income and lower literacy levels.
- An association between lower levels of literacy and lower levels of participation in second-chance education and training.

Education levels in Ireland are polarized according to age: while by international standards there is an above average percentage of people under 35 with third level qualifications, a significant number of people aged over 45 did not complete secondary education. On the basis of data from the 2006 Census, approximately 1 million adults who have completed full-time education have less than upper second level qualifications and just over 552,000 of these ceased their full-time education at primary level.

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<sup>19</sup> DES-Department of Education and Science, *White Paper on Adult Education*, (Ireland 2000) and Department of Enterprise, Trade and Employment *Report of the Task Force on Lifelong Learning*, (Ireland 2002).

<sup>20</sup> European Commission (2000), *A Memorandum on Lifelong Learning*, SEC(2000) 1832.

This group represents 40% of the total population aged over 15 who have completed their education and the phenomenon is due to the relatively late introduction of free post-primary education in Ireland. Apart from considerations of social justice raised by such differences in attainment, the task of upgrading the educational attainment levels of those aged between 25 and 64 also has significant economic implications in relation to the reduced relative level of competitiveness.

These implications were emphasized by the report of the *Expert Group on Future Skills Needs* (2007) which highlighted the need for upskilling through education and training. Specific educational attainment targets are set in the Irish skills report for adults with less than upper secondary education, with 70,000 people projected to advance from Levels One and Two to Level Three on the National Framework of Qualifications and a further 250,000 to progress to Levels Four and Five. These considerations have been given more urgency by the current global recession and its impact on the Irish economy and employment levels, particularly in relation to low-skilled workers.

The publication of *The White Paper on Adult Education* in 2000, along with the *Task Force on Lifelong Learning* (2002) and the launch of the National Framework of Qualifications (2003) represented the espousal by the Irish government of lifelong learning as the governing principle of education policy.

The National Framework of Qualifications was a response to a situation whereby awards for educational achievement were made through a variety of structures and agencies, operating a variety of systems and sub-systems. The objective was to support learning and mobility by enhancing the transparency of qualifications. At a practical level, the framework makes it possible for the learner to identify how and at what point they can enter a learning programme that will lead to an award, the possibilities for transfer and progression to other programmes and to higher level learning opportunities. Modularization facilitates access to a wider range of learning opportunities, by making it possible to build up qualifications over time. The process of referencing the Irish National Framework of Qualifications against the European Qualifications Framework was completed in June 2009. Further details may be obtained on [www.nqai.ie](http://www.nqai.ie).

Following the *White Paper's* publication the Back to Education Initiative (Part-Time) was launched in 2002 as part of the Irish Government's programme for Second-Chance and Further Education. The Initiative is underpinned by an overall aim to **increase the participation of young**

**people and adults with less than upper second level education in a range of flexible part-time learning opportunities** and complements other full and part-time provision in further and adult education funded by the Department of Education and Science.

***Its objectives are to address the education needs of those with minimal or no educational qualifications and school leavers through:***

- The provision of programmes that lead to qualifications equivalent to upper second level.
- The provision of programmes that lead to qualifications in line with labour market demands.
- The provision of re-entry routes for those who wish to upgrade their skills in line with emerging socio-economic needs.

Following on from these objectives the Back to Education Initiative has a number of specific priorities:

- Introducing greater flexibility into the Irish education system which has had a predominant emphasis on full-time provision and time specific entry and exit opportunities.
- Promoting greater synergy between different forms of provision.
- Assisting individuals in combining family, personal and work responsibilities with learning opportunities.
- Engaging hard-to-reach groups in learning activity.
- Addressing the low literacy levels of the Irish adult population by providing a bridge from literacy provision to other courses.
- Offering a wider range of choices, which are appropriate to the particular circumstances of learners, and leading to national certification or accreditation with a strong focus on increasing the number of Irish adults who have certification at upper secondary level or equivalent.
- Addressing specific skill needs, by providing courses in business, tourism, art and craft, childcare, healthcare and a broad range of disciplines within the services sector as well as offering access to Information and Communications Technology training.

The Back to Education Initiative parallels other developments in Ireland in the field of adult learning that were implemented following the publication of the *White Paper on Adult Education*, such as the National Adult Literacy Programme, the Adult Education Guidance Initiative and the appointment of staff to promote the role of Community Education.

### *Description of the solution*

The Back to Education Initiative comprises two strands:

- Formal strand (Vocational Education Committees (local education authorities) providing the bulk of the provision, and a small number of post primary schools who provide adult education courses.
- Community Strand (There are currently 50 community groups offering BTEI provision). 10% of the annual BTEI budget is allocated to these groups.

The Community Strand was established in recognition of the long-standing contribution of the Community Education movement in Ireland in reaching large numbers of participants, frequently in disadvantaged settings and outside mainstream institutions, and in pioneering new approaches to teaching and learning.

The funding mechanism ensures a primary focus on delivery, with providers required to deliver a prescribed amount of tuition annually: funding is also designed to take stock of the need for co-ordination, pre-development and outreach, as well as participant supports.

The Initiative offers part-time provision of up to 400 hours a year, leading to certification through the National Framework of Qualifications at levels 1-6, with priority given to adults accessing courses at levels 3 and 4 (broadly equivalent to Levels 2 and 3 on the European Qualifications Framework). Participants may obtain certification on a modularized or component basis. Typically participants undertake 2-4 components a year, building up over time to a whole award and progression to other further education and training opportunities or employment. The average time spent in tuition annually by participants is 200 hours.

### *Eligibility criteria*

When the Initiative commenced in 2002 courses were provided free of charge to those with less than upper second level education with a social welfare entitlement. Unwaged people with less than upper secondary level with no underlying social welfare entitlement were required to pay 30% of fees. These criteria were broadened in 2007 and current eligibility criteria provide free tuition to any adult with less than upper second level education. Those eligible now include people with a social welfare entitlement, unwaged people and those in employment. In making this policy change a key priority was to remove barriers to access for all adults with less than upper second level education.

The Initiative places a clear focus on attainment of certification through the National Qualifications Framework, designed to assist adults' access, transfer and progression to other education or employment pathways. These objectives are set in line with Government policy objectives in relation to lifelong learning and socio-economic development. Performance Indicators also conform to those established in conjunction with the European Commission under the European Social Fund's Human Capital Investment Operational Programme 2006-2013. These performance indicators relate to enrolment, certification and progression to other further education and training opportunities.

Mid-term targets set for 2010 are as follows:

***Participation: 10,000 places<sup>21</sup>***

***Achievement of full or partial certification: 50% of participants***

***Progression to education, training or employment: 60% of participants.***

The Initiative is funded by the Irish Government through the Department of Education and Science and co-funded by the European Social Fund. The budget for 2009 is €18,000,000 (eighteen million euro).

### *Methodology*

Providers are advised to prioritize the offer of integrated packages of modules leading to certification at Levels 3 and 4 on the National Framework of Qualifications, with a focus on progression opportunities for those who have commenced activity.

While provision may include courses at Level 5 and above, there is an upper level of 30% set for the enrolment of participants with upper secondary education. The Department of Education and Science, in collaboration with providers, has developed detailed guidelines on strategies to facilitate positive learning outcomes through attainment of certification.

These guidelines are available on:

[www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN](http://www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN).

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<sup>21</sup> A place represents a specified number of learning hours.

### *Courses Provided*

**Basic education** – an induction and progression platform for new learners or those progressing from adult literacy and non-accredited community education programmes. The focus is usually on communication skills, Mathematics, personal development and basic computers leading to certification at National Framework of Qualifications Level 3 (EQF Level 2).

These programmes leading to full awards at level 3 are often marketed as “Foundation for further study”. Their length varies, depending on the number of tuition hours provided on a weekly basis, and are offered either over a 12 or 24 month period. The courses are designed as a first step for early school leavers with minimal experience of post-primary education who are seeking a second chance to reengage with education. They offer a substantial Basic Education/Return to Learning programme for those with the lowest levels of educational attainment. Programmes are designed to reintroduce participants to learning in an enjoyable way, to gain confidence and develop a strong foundation from which they can progress to vocational or higher level courses.

**Information and Communications Technology:** opportunities to gain qualifications in ICT, leading to progression routes to higher levels and qualifications in business and office administration.

**Leaving Certificate** courses (terminal upper secondary school examination): in some instances participants undertake single subjects such as English or Mathematics to complement other vocationally oriented courses, in other cases or a broader number of subjects to provide the equivalent of a full Leaving Certificate.

**General Skills programmes at Level 4** on the National Framework of Qualifications (EQF Level 3), again as a foundation for further study in vocationally related programmes. In some instances the programmes are designed with a specific emphasis on subjects such as Mathematics and Information and Communications Technology, needed for progression to higher levels. In other cases, the programmes are focused specifically on younger early school leavers, who need to undertake bridging courses in order to gain access to more mainstream further education and training programmes.

**Vocationally related programmes at Level 5** on the National Framework of Qualifications with an emphasis on the following areas:

*Childcare and Social Care* – these courses are driven by the continuing demand for qualifications in childcare and the growing demand for qualifications in other health and areas – care of the elderly and people with disabilities, nurses' aides.

*Business Secretarial and Tourism* – responses to part-time and full time employment opportunities in the service area – reception, crafts, food and catering, business and administration.

#### *Outreach Provision*

The Back to Education Initiative reflects government policy enunciated in *The White Paper* that issues relating to socio-economic status and gender, equality and inter-culturalism should underpin all adult education policy initiatives with the needs of marginalized groups being identified and explicitly addressed. Other Irish Government policy statements such as the *National Anti-Poverty Strategy* and the *National Development Plan 2007-13* also focus on education as a key measure in addressing poverty and social exclusion. Individuals and groups that experience particular and acute barriers to participation and find it more difficult to engage in the formal learning process are prioritized.

These **target groups** include early school leavers, the long-term unemployed, lone parents, people with disabilities, ex-offenders and those with addiction problems, homeless people, Travellers, and migrants.

The equality approach aims to counteract barriers arising from differences of socio-economic status, gender, ethnicity and disability. The objective is to design programmes that promote flexible accessible provision adapted to learners' needs, with a strong emphasis on learner-centredness, accessibility and inclusiveness. For example, for very marginalised groups, such as homeless people, education may not always be perceived as a priority. However it may be used to attain other identified priorities – for example, a personal development course may play an important role in assisting homeless people to gain and maintain accommodation and healthcare.

The Back to Education Initiative places emphasis on the development of appropriate methodologies through **outreach** to attract these target groups and applications for funding are required to demonstrate cooperation and partnerships with other agencies at local level. Strong examples of **outreach** work have been evidenced by practice undertaken as part of the Initiative. This reflects the recognition amongst adult education practitioners that outreach work is one of the most effective ways of engaging adult learners who do not usually access educational provision.

Outreach is defined as the process engaged in by education providers to bring services to the learners in ways that work for them. Three inter-related strands of development are highlighted:

- Engaging with adults who are consistently not availing of educational opportunities to identify their motivations and needs in relation to learning. In some cases preparatory or taster courses are offered to facilitate this process.
- The physical relocation or moving of educational programmes, services and staff out of traditional colleges and institutions into local settings.
- Adapting existing educational provision and designing new programmes to establish more appropriate starting points and modes of delivery for learners.

Participation and integration into mainstream further education needs to be encouraged, and supports developed to assist with the transition. A range of case studies of practical examples of outreach work, in both rural and urban settings and which involve education providers engaging with local communities and their leaders to establish new forms of provision may be accessed in the publication *Widening Participation in Adult Learning: Guidelines for Effective Planning and Delivery of Back to Education Initiative Outreach Provision* available on [www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN](http://www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN).

Specific steps have been implemented to attract more **men** to these part-time programmes, as participation rates initially reflected the **gender imbalance** reported across broader adult and community education sector in Ireland, and internationally. Research undertaken has demonstrated the need to provide specifically tailored courses, with a strong vocational interest, in order to attract men and these research findings are reflected in a number of examples of good practice outlined in the report *Increasing Men's Participation in Adult Learning: Guidelines to Enhance Men's Engagement with Back to Education Initiative Funded Programmes*, available on

[www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN](http://www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN).



### *Supports*

One of the key objectives of the Initiative is to provide adults with low levels of formal education opportunities to reengage with learning. Evidence from the International Adult Literacy Survey, as detailed above, demonstrates that a significant percentage of adults in Ireland have difficulty with basic literacy tasks and do not have the competences to progress to higher levels of education and training. Consequently there is a focus on the provision of supports to participants, through the integration of literacy provision and guidance:

- Participants are encouraged to improve reading, writing and spelling skills specifically linked to the core subject.
- Numeracy support to assist with number based skills needed for course requirements is also promoted.
- English language assistance for speakers of other languages is offered.
- Broader learning support in relation to time management, note taking essay writing and exam preparation where appropriate is also provided.
- Guidance support to ensure appropriate placement on a course, acquire study skills and identify progression routes is incorporated.

Further information and case studies on adult literacy support provided through Back to Education Initiative programmes can be accessed in the report *Promoting Access and Progression in Adult Learning: Guidelines to Enhance Cooperation between Back to Education Initiative and Adult Literacy Programmes*

[www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN](http://www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN).

### *Results and Impact analysis*

The data set out below are gathered through statistical returns made annually by providers to the Department of Education and Science. In **2008, 27,000 people** participated in courses under the Back to Education Initiative (Part-Time). 76% of these participants were women and 24% were men. This participation rate exceeds the target set by the Department of Education and Science.

Further data on participants' age, socio-economic and educational status are provided as follows:

**Age:** the majority of participants were aged between 21 and 44 (56%). 18% were aged between 45 and 54 and a further 19% were aged over 55. Only 4% were aged between 18 and 20.

**Economic Status:** 20% of participants were employed, and 24% were unemployed. 54% were categorized as 'not in the labour market'.

**Educational Status:** 27% of participants had only primary education. 41% had attained lower secondary and 31% had upper secondary education or above.

**Target group** profiling of participants is based on self report. The main categories reported were as follows:<sup>22</sup>

Disability	14%
One Parent Family	12%
Travellers	4%
Migrants	10%
Early school leaver	34%.

**Results: 37% of the total cohort was recorded as having achieved full or partial certification in 2008.** It is estimated that the actual figure for those achieving certification is higher, but due to delays in finalizing assessment procedures some data were not submitted by providers. This figure exceeds the baseline target of 30% set for 2006 and the focus is now to increase certification rates to meet the mid-term target of 50% set for 2010.

**Impact: 27% of participants progressed to other further education and training or employment in 2008 with a further 35% reported as continuing courses under the Initiative in 2009,** reflecting the flexible nature of provision which enables participants to combine study with other responsibilities. The overall target set for progression for 2013 is 65%. While the data collected provide a comprehensive analysis of participants' profile and attainment on an annual basis, currently there is no capacity to track achievement longitudinally because of the absence of a management information system at national level. The Department of Education and Science is currently reviewing options to develop such a mechanism.

#### *Other Evaluation*

In 2006 the Further Education Unit of the Department of Education and Science published a Discussion Document based on extensive consultations

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<sup>22</sup> Information on target groups is collected on a 'self report' and voluntary basis from participants. No data is available on the entire cohort. Those listed represent the main categories reported.

with providers during 2005 and 2006. This report indicates that adult education providers view the Initiative as a positive development. They especially noted the flexibility of the funding mechanism which has enabled an expansion of the range of learning options available in Ireland, particularly in more isolated rural and community based locations. They reported that those not comfortable with a traditional school or college environment are now able to learn in more relaxed settings with structured supports and courses tailored to meet their specific needs. Key recommendations from this consultation process requested the development of guidelines relating to:

- Effective outreach provision.
- Increasing the participation of men.
- Developing more structured supports for students with literacy difficulties.
- Protocols for the participation of students with disabilities.
- More structured supports for programme planning and development.

The development of these guidelines was undertaken in collaboration with local adult education providers. They are available at the web link listed below.

A formal external evaluation or impact study of the Back to Education Initiative (Part-Time) has not yet taken place.

*Sources*

[www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN](http://www.education.ie/home/home.jsp?pcategory=10900&ecategory=14965&language=EN)  
[www.education.ie](http://www.education.ie)  
[www.fetac.ie](http://www.fetac.ie)  
[www.nqai.ie](http://www.nqai.ie)

### **1.3 Latvia, New solutions for promoting ex-offenders employment**

by Dr. habil. paed. Irina Maslo-Professor of the Faculty of Education and Psychology-Head of the Institute of Pedagogical Science of the University of Latvia

#### *Problems faced*

The problem faced by New Solution for Promoting Ex-offenders Employment is the low skills and education level of ex-offenders. They have lost certain skills and abilities needed for independent life in society which, in turn, is a cause for addiction problems (alcohol, drugs). Ex-offenders experience a negative attitude from society. Facing these problems and not finding a place in society, ex-prisoners commit new crimes and get imprisoned again. Statistics show that every year more than 2,500 prisoners are released from prisons in Latvia. In the year 2000 the number of repeat offenders in Latvia constituted 27.4% of the total number of prisoners, which is more than a quarter. According to the findings of a study of Latvian prisons conducted in 2007 on a representative sample of more than 850 respondents, there were 11 prisoners (1.3%) who had not attended school, 220 young people (25.9%) with unfinished elementary education (<8 grades), only 138 people with vocational education (16.2%), including 5 people older than 64 (0.5%) and 15 people aged from 55 to 64 (1.7%).

#### *Lessons learned and reasons that explains the relevance of the Good Practice*

The programme, developed within the period 2006- 2010 as a national initiative, has succeeded in overcoming issues relating to prisoners having no professional qualification and very few opportunities for employment on release. In Latvia at present there are 6,548 prisoners serving time in prisons. 76% (about 5000) are prisoners with no qualification or occupation.

The programme was piloted in Jelgava Prison. The prison introduced accredited level 2 vocational continuing education programmes leading to the MAG qualification (*Welder Using Mechanized Equipment in an Active Gas Environment*). The prisoners attended accredited training which includes theoretical and practical lessons. In 2007, two thirds of the

programme's applicants passed the national qualification examination and achieved the 2nd professional qualification level. This provides prisoners with an opportunity to obtain vocational qualifications that also enables them to work in the production unit of the prison, thus increasing their interest in gaining professional qualifications and experience that would favour their inclusion in the labour market and society on release from prison.

#### *Method used*

The implementation of the project has 4 important phases:

1. Project preparation and application.
2. Motivating engagement in learning: prisoners were informed about the programme content, the programme of learning and the opportunities they would have after gaining the welder's qualification.
3. Course delivery with 240 hours of theoretical and practical training, followed by a further 240 hours of training in the production unit based in the prison. Instruction took place daily for 8 hours, including individual discussion with each participant. During the practical welding training the trainer/teacher closely observed the learner's activities and made an evaluation of each welder.
4. Qualification examination and project evaluation. The exam questions were set and approved by the Ministry of Education and permission is granted to organise exams. The results were sent to the Vocational Education administration of the Ministry of Education and Science where they were approved and the respective number of certificates were registered and issued.

#### *Solution adopted to the initial problem*

Due to a large number of low skilled prisoners this programme was developed to offer them the chance to gain an appropriate qualification to find employment and integrate better in society. So the solutions found were first of all the programme had to be licensed; secondly provision of teaching-learning aids is a compulsory requirement for professional continuing education programmes, otherwise the programme cannot be licensed; thirdly the educators' experience and qualifications they were professionals in several subjects, working in a team and all had experience

of intercultural learning environments.

### *Transferability*

This is a national initiative that addresses a problem faced by many prisons. So, the idea of developing a vocational course inside the prison is very useful. By building all this inside the prison we must pay attention to the costs, because if we implement this for the first time the costs are higher, because we must start from zero, but for the next programme we can use the existing facilities. We must be aware also about the trainers' competences in working with imprisoned adults if we want to succeed and to really offer a chance to those people to get a job after release. Another important aspect is the recognised certificate which indeed facilitates access to the labour market for ex-offenders.

### *Weak and strong aspects*

A weak aspect is that it covers only vocational content, another aspect is that is vulnerable to external factors, like economic crisis and at present the global economic crisis presents an obstacle for the implementation of such a programme. Also, a delicate part is the implementation of the programme across the country because the teaching team that took part in this programme is small and there are very few qualified trainers in the country. Also, the analysis of cost efficiency was not undertaken. The adult education centre staff thinks that cost efficiency should be calculated taking into account the programme's results [the number of qualified people, reviews of the learning quality] and comparing them with the funds used.

A strong aspect is that all the prisoners after release could get employment and work as welders. For example, in the period of 2007-2009, two-thirds of the programme's participants passed the centralized qualification exam and acquired the 2<sup>nd</sup> level professional qualification level. They started work in the prison's production unit, which enhanced their professional competences providing the opportunity for paid work and development of new social skills in labour relations.

## *Description of the case study*

### *Background*

Good practice is practice which has been specifically created taking into account the *Guidelines for the Strategy of Lifelong Learning for the Period of 2007-2013* and *The Programme for Introduction of Lifelong Learning Policy Guidelines 2007-2013 in the Years 2008-2010* adopted in Latvia. Lifelong learning in Latvia is interpreted as the learning people undertake throughout their lives based on changing needs to acquire knowledge, skills, experience in order to raise or change their qualification in accordance with the requirements of the labour market, or their own interests and wishes. Lifelong learning combines non-formal learning with formal education, develops natural abilities alongside new competences. The Ministry of Education and Science of Latvia attracts finance from structural funds and other sources to implement the lifelong learning policy. In the 2004-2006 planning period funding was attracted through the framework of ESF National programme, *Mūžizglītības stratēģijas izstrāde un ieviešana*, [Working Out And Implementing Lifelong Learning Strategies] for creating regional support systems and strengthening capacity, and seven projects were implemented to introduce lifelong learning strategies in the period 2005-2008. Six of these were in the regions of Latvia and Riga City and one was implemented by the Latvian Adult Education Association. The total amount of funding in these projects was 1,644,243 LVL (€2,339,547), 75% of which came from the ESF/European Social Fund (1,215,450 LVL, equal to €1,729,430) and 25% from the state budget (405,150 LVL, equal to €576,477). In the 2007-2013 planning period, funds have been allocated to sub activity 1.2.2.1.3. *Support for Specific Spheres of Lifelong Learning Policy* within the operational programme *Human Resources and Employment* with the aim of supporting the implementation of the lifelong learning policy and its access by adults who have the least access to education and continuing education opportunities, including access to lifelong learning for offender and ex-offenders. Beneficiaries: the Latvian Prison Administration and State Probation Service, a state institution which according to law and regulation has been given the right to implement the state policy of imprisonment as a precautionary measure and restriction of liberty as a punishment.

In general, this programme envisages access to elementary education and vocational education designed and licensed by the state in all prison establishments since 2008 in the same way as it is implemented in formal

education. The study conducted in 2007 reveals that the demand for education in prisons exceeds its supply and does not correspond to the priority, *Cilvēkresursu attīstība un nodarbinātības veicināšana*, [Development Of Human Resources And Promotion Of Employment] stated in the Latvian Development Plan for the period 2004-2006, nor to the changing requirements of the labour market. Lack of education, coupled with inadequate social skills, is the main cause of the social exclusion of this group of people. It is interesting to note that only 9% of prisoners use prison educational opportunities. 91% do not use these opportunities at all. About 50% of those who participate in education in prison admit that they grasp the learning content with difficulty.

The good practice of integration of formal, non-formal and informal learning in prisons necessarily differs from the implementation of similar activities elsewhere. The model of delivery of the programme initiated by Jelgava Regional Adult Education Centre (JRPIC) offered an individualized vocational [occupational] development path taking into account the needs of the learners, existing barriers and other factors that hinder prisoners' participation in learning (see the *Table* below).



*Table 1 - Obstacles and current scenario*

<b>Obstacles to participation in training</b>	<b>The current scenario in Latvia</b>
<i>Cost of training</i>	State and ESF financing (data on separate contract prices is not available)
<i>The places where training activities are carried out</i>	Closed type of institution, programmes take place in cells. 78% of the questioned are not able to compete in labour market as they do not have a profession. This is the primary problem of people aged 55-70 on release from prison.
<i>Private/families and social obligations</i>	The programmes offered do not correspond to the changing requirements of the labour market. Lacks of education, coupled with inadequate social skills, are the main factors causing social exclusion in this category of people. Half of the prison population are repeat offenders. One of the reasons is that people released from prison do not have sufficient education to find employment. They have lost various life skills and abilities necessary for independent life in society which is, in turn, a cause for addiction (alcohol, drugs). Ex-offenders experience a negative attitude from society. Facing these problems and not finding a place in society, ex-prisoners commit new crimes and are re-imprisoned.
<i>Training seen as "going back to school"</i>	Only 9% of the target group participate in programmes and 91% of the target group do not participate.
<i>Training meeting actual needs and/or personal expectations</i>	About 50% of those who acquire education in prison admit that they have difficulties in grasping the learning content.

### *Description of the solution*

In order to participate in the project the following preconditions had to be met:

- 1) the programme had to be licensed;
- 2) provision of teaching-learning aids is a compulsory requirement for professional continuing education programmes, otherwise the programme cannot be licensed.

*Innovative element:* the difference in the implementation of this programme in terms of the quality of teaching-learning aids.

For example, JRPIC has experience working with adults that differs from the experience of other traditional vocational education institutions. Therefore both in preparing teaching-learning aids and in the delivery of the programme JRPIC staff used experience-based learning. For example, in science materials the prisoners were asked: *What kind of material would you choose to make a knife? Please, explain your choice.*

3) the educators' experience and qualifications

*Innovative element:* the educators were professionals in several subjects; worked in a team and all had experience of intercultural learning and mobility as they had acquired education mostly abroad (see the *Table* below).

*Table 2 - An interdisciplinary, competent team of educators*

<p>A (male) – the director of the programme, the director of JRPIC Metal processing branch, aged 43, long-term experience in providing theoretical and practical training for welders, active member of the Association of Metal Sciences and Engineering Industry, is well aware of the situation in factories/plants – technical equipment, employees' qualification. Conducted practical training.</p> <p>B (male) – has graduated from Riga Technical Institute, with specialization in welding. Has been awarded an expert's status in evaluation of welding. Work experience of 40 years, aged 71. The subjects: technologies of arc welding, labour safety techniques, materials sciences. The author of technical literature in the field of materials sciences.</p> <p>C (male) – higher technical education. Expert in evaluating welding, 40 years' experience in manufacturing, aged 69. Conducts practical training in welding.</p> <p>D (male) – specialist in welding, has graduated from the Technical Institute of Leningrad (Russia), 40 years' experience in evaluating welding in manufacturing. The subjects: theory of welding, technologies of arc welding, materials sciences.</p> <p>E (male) – JRPIC specialist, works in Metal processing branch, aged 25, qualified welder, has work experience in Estonia. Conducts practical training.</p> <p>F (male) – the educator of the Electrical Engineering Department of Latvia University of Agriculture, 30 years' experience in electrical engineering, aged 75. The subject: electrical engineering.</p> <p>G (female) – has graduated from Riga Technical University (Latvia), 17 years' experience in manufacturing. An evaluation specialist in metal laboratory. Aged 62. The subject: materials science.</p>
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**Innovative element, [only in the Jelgava Adult Education Centre model]:**

The teachers/trainers do not have a strict teaching load and timetable as in formal education. The contract signed by JRPIC contains an estimate but the institution is free to determine how these resources will be used. The management of the institution is interested in achieving as good a result as possible and therefore manages the learning programme flexibly and can pay the teacher/trainer for any additional input, which provides opportunities for individualisation.

**Selection of participants**

Criteria are set by the educational programme (elementary education level). *An innovative element:* the programme was not compulsory, people could take part on a voluntary basis. However, the prison administration set a requirement that prisoners with disciplinary offences were not allowed to participate. In addition it was specified that prisoners could not be let out of the closed cells so only those from the general type of cells were involved. Knowledge of the official language was also a requirement as the exam has to be taken in Latvian.

*Innovative (equating informal education to formal):* However, in this programme a certificate was not required; language skills were assessed in conversations during the training. One group of learners had poor language skills and had extra lessons and more explanations were provided.

By demonstrating their wish to learn, the prisoners showed their readiness to be integrated into society, consequently, on release, they were provided support in finding employment. It was a motivating factor.

**The content of the programme and its delivery**

Usually the contents of the programme comprises theoretical studies (240 hours) and practical training (240 hours) for 8 hours a day (theory lessons 4 hours in the morning and workplace learning 4 hours in the afternoon) and at the end of the course the learners had to take the State qualification exam.

*An innovative element:* individual tuition– an initiative provided by JRPIC which other similar programmes do not provide. Such tuition was deemed necessary and useful, based on the previous experience of the adult education centre staff. Learners undergo examination practice after training and tend to forget the theoretical knowledge they have acquired which makes them feel less confident. Uncertainty about the examination process adds to this and all of this influences the results of the exam. Personal tutoring hours provide the opportunity to revise the most important

knowledge and the teacher/trainer can provide practice tasks similar to those in the exam. After this the learners are more confident and this confidence can be seen in the exam results. Personal tutoring shows the advantages of formal and informal education.

### **Assessment**

The procedure for state qualification examinations is regulated by the Regulations of the Council of Ministers of the Republic of Latvia. First, exam questions should be prepared by the educational institutions and approved by the Ministry of Education and Science. Permission to organise exams and the approval of the State Examination Commission should be received. The requirements of the Examination Commission are also regulated. The Commission is independent; the specialists from the educational institution are not allowed to participate in its work. The members of the State Qualification Examination Commission should be representatives of employers with corresponding education and work experience. The exam results are sent to the Vocational Education administration of the Ministry of Education and Science where they are approved and the respective number of certificates are registered and issued.

### **Project management and financing**

From the administrative point of view the State Probation Service implemented the project. The State Probation Service announced a call for tenders for training and JRPIC applied. A service contract was agreed between the State Probation Service and JRPIC. After its completion both parties signed to confirm acceptance of delivery. The report on the project was compiled by the State Probation Service.

A detailed project evaluation was not required from JRPIC. The most significant criterion was the number of people who passed the exam and qualified. However, some of those who had started learning in the JRPIC programme did not receive accreditation, but this was for the positive reason of being released before completing their studies

The timescale and scope of the programme was appropriate. The fact that all the prisoners after release could get employment and work as welders showed this. A positive feature of the timing was the interval between the training and the exam during which personal tutoring could be provided.

The level of costs is connected with the amount of work and funding invested in furnishing and equipping the premises for learning. In the case of JRPIC the costs were higher because the premises had to be arranged

from “zero”. The next institution delivering learning could work at lower costs, using the existing facilities.

An analysis of cost efficiency was not undertaken. The Adult Education Centre staff consider that cost efficiency should be calculated taking into account the results of the programme [the number of qualified people, reviews on the learning quality] and compare these with the funds used. Renewed contracts should be offered to those educational institutions with the highest cost efficiency coefficients.

### *Methodology*

The project aimed at reducing social exclusion. Offenders when released from prison do not have opportunities to access the labour market, they are rejected everywhere and are forced to turn back to criminal activity.

The implementation of the project may be divided into 4 stages: project preparation and application; motivating engagement in learning; course delivery; qualification exam and project evaluation.

#### **PHASE I - Project preparation and application**

Opportunities in the Jelgava region were evaluated in order to implement the state lifelong learning policy and programme for the promotion of employment for poorly educated prisoners. Taking into account the location of Jelgava Engineering Plant and the employment problems in engineering industry, as well as job opportunities for offenders on release from prison, Jelgava Regional Adult Education Centre prepared for licensing a continuing education programme for welders as follows:.

- 1) the programme was designed in adherence to the requirements of the existing occupational standards in Latvia;
- 2) provision of teaching-learning aids is a compulsory requirement for professional continuing education programmes, otherwise the programme cannot be licensed. In Latvia there are no course books for welders. The course tutor of the *Welding technologies* course is the author of the course book on welding, enabling high quality, well designed teaching-learning aids to be provided. The tests for assessing the learners' knowledge were compiled during the curriculum design process;
- 3) from the administrative point of view the State Probation Service implemented the project. The State Probation Service announced a call for tenders for training and JRPIC applied. A service contract was concluded/agreed between the State

## Probation Service and JRPIC.

### **PHASE II** -Motivating engagement in learning

In order to attain this goal an interdisciplinary team of professionals was set up (see *Table 2* above).

First, the prison administration informed prisoners about the learning opportunity and how it would influence their confinement regime. Then the programme director told the inmates about the programme content, the programme of learning and the opportunities they would have after gaining the welder's qualification. In this way feedback on the prisoners' motivation, preparedness and particular personal development needs was obtained, which contributed to the course team's understanding of factors to take into account when delivering the programme. The position was that by demonstrating their wish to learn, the prisoners showed their readiness to be integrated into society, consequently, on release, they were provided support in finding employment. It was a motivating factor.

Participation was on a voluntary basis - there was no compulsion to join. At the same time as recruitment was taking place, premises for learning and training were prepared. Jelgava Regional Adult Education Centre (JRPIC) equipped the rooms with ventilation and an electricity supply system, which remained at the prison's disposal after the training ended. JRPIC brought and installed the welding equipment for the duration of the project.

The curriculum was designed and the course team underwent training provided by the State Probation Service on the psychological aspects of organising pedagogical work in a closed society.

### **PHASE III** – Course delivery

When preparing for teaching, the programme director had a meeting with the prison administration and prisoners that provided an understanding of how to work with the inmates and how to develop a course that reflected their needs. Initially, 240 hours of theoretical and practical training was delivered, followed by a further 240 hours of training in the production unit based in the prison. The lessons were held every day for 8 hours a day. When the training started the programme director accompanied each of the teaching team in order to monitor and evaluate the process as well as providing support. Handouts on each topic were prepared – on technologies, equipment, the schemes of processes, diagrams with basic terms and their explanations. The handouts included space for the learners to make notes, and, as the inmates tried to put everything down in a very detailed way, extra sheets of paper had to be provided. The project had not planned to purchase books. The programme director donated technical

books from his own library. During the practical welding training the trainer/teacher closely observed the learner's activities and evaluated their welding. It was planned that, after completing a topic, the learners would take a test to test their understanding and knowledge and then make any appropriate improvements needed. These tests for assessing learners' knowledge were also prepared during the design of the curriculum.

During the programme delivery individual discussions took place with each participant. As prisoners generally lacked communication opportunities, they were interested in discussing everything – their success and failure and the world of their vocational specialism.

After the completion of training there was an interval to revise the acquired knowledge. During this interval the JRPIC course team worked with the prisoners – this was an initiative provided by JRPIC, which had not been planned into the programme and the project. The need for this and its usefulness had been identified previously when working with many groups of learners. Learners prepare for taking their qualification after the training and tend to forget the theoretical knowledge covered in the course making them feel less confident. Exam nerves increase this lack of confidence and all of this influences the results of the exam. Personal tutoring hours provide the opportunity to revise the most important knowledge and the teacher/trainer can provide practice tasks similar to those in the exam. After this the learners are more confident and this confidence can be seen in the exam results. Personal tutoring shows the advantages of formal and informal education. The teachers/trainers did not have a strict teaching load and timetable as in formal education. The contract signed by JRPIC contained an estimate but the institution was free to determine how to use the resources. The management of the institution was interested in achieving as a good result as possible and therefore managed the learning programme flexibly and paid the teacher/trainer for extra time to provide individual/personal tuition. Thus psychological readiness for the exam was provided.

#### **PHASE IV - Qualification exam and the project evaluation**

The procedure for state qualification examinations is regulated by the Regulations of the Council of Ministers of the Republic of Latvia. First, exam questions should be prepared and approved by the Ministry of Education and Science. Permission to organise exams and the approval of the State Examination Commission should be received. The requirements of the Examination Commission are also regulated. The Commission is independent; specialists from the educational institution are not allowed to participate in its work. The members of the State Qualification Examination

Commission should be representatives of employers with corresponding education and work experience. The exam results are sent to the Vocational Education administration of the Ministry of Education and Science where they are approved and the respective number of certificates are registered and issued.

Questioning after the training was not carried out because of technical problems. The State Probation Service and Jelgava Adult Education Centre signed an acceptance delivery act according to the requirements of the project contract. The report on the project was compiled by the State Probation Service.

#### *Results and impact analysis*

Good practice is practice which has been specifically created taking into account the documents adopted in Latvia, *Guidelines for the Strategy of Lifelong Learning for the Period of 2007-2013* and *The Programme for Introduction of Lifelong Learning Policy Guidelines 2007-2013 in the Years 2008-2010*.

An example of best practice is the integration of formal, non-formal and informal learning and it significantly differs from implementation of other similar learning activities. The JRPIC's delivery model offered an individualized professional development path taking into account the needs of the learners, existing barriers and other factors that hinder offenders' participation in learning (see the *Table* below).

The findings show the following impact of the Good Practice:



Table 3 - Main findings

<b>Obstacles to participation in training</b>	<b>The current scenario in Latvia</b>	<b>Jelgava Adult Education Centre Practice</b>
<i>Cost of training</i>	State and ESF financing (data on separate contract prices are not available).	<p>Attracted funding from the manufacturing company alongside the funding received from the state and ESF, as well as the co-financing from the Adult Education Centre.</p> <p>The level of funding was adequate in terms of the amount of work and the investment in furnishing and equipping the premises for learning. In the case of JRPIC the costs were higher because the premises had to be arranged from “zero”. Another institution implementing such a course could work at lower costs, using the existing facilities.</p>

<b>Obstacles to participation in training</b>	<b>The current scenario in Latvia</b>	<b>Jelgava Adult Education Centre Practice</b>
<i>The places where training activities are carried out</i>	<p>Closed type of institution, teaching takes place in cells.</p> <p>78% of prisoners surveyed are not able to compete in labour market as they do not have a profession. This is the primary problem of ex-offenders aged 25-70.</p>	<p>Vocational continuing education programme <i>Arc welder implementing mechanized equipment in active gas environment</i> (MAG) carried out in Jelgava Prison in 2007 resulted in the issuing of certificates of recognized qualification by the state for 67.5% of the programme's participants, which is 10% more on average than EQUAL projects country wide.</p>
<i>Private/families and social obligations</i>	<p>The programmes offered do not relate to the changing requirements of the labour market. Lack of education along with inadequate social skills are the main factors in social exclusion of this group of people. Half of the prison population are repeat offenders. One of the reasons is that people released from prison do not have sufficient education to find employment. They have lost various life skills and abilities necessary for independent life in society which, in turn, is a cause for addiction (alcohol, drugs). These people experience a negative attitude from society. Facing these problems and not finding a place in society ex-prisoners commit new crimes and are imprisoned again.</p>	<p>After becoming qualified the prisoners started working in the prison's production unit equipment for which was provided by the enterprise. The money earned was transferred by many project participants to their families. The prisoners' informal actions also showed their motivation and attitude. One prisoner asked the trainer to leave the book, <i>The Basics of Technical Drawing</i>, after lessons and all prisoners copied it using paper and pencil. 3 prisoners ordered the trainer's books and paid for them from their daily allowances.</p>

<b>Obstacles to participation in training</b>	<b>The current scenario in Latvia</b>	<b>Jelgava Adult Education Centre Practice</b>
<i>Training seen as "going back to school"</i>	Only 9% of the target group participate in prison learning programmes and 91% of the target group do not.	16% of the target group participated for one year and 32% for another. This was possible because of combining traditional training with workplace learning, designing of specialised teaching-learning aids, which are not included in other models, and because of the introduction of a self-learning phase in the form of individual tuition.
<i>Training meeting actual needs and/or personal expectations</i>	About 50% of those who take part in education in prison admit that they grasp the learning content with difficulties.	2/3 of the participants absorbed the programme content with interest and without any difficulties.

The experience of Jelgava Adult Education Centre is considered to be a best practice example because:

- 1) As a result, in the period of 2007-2009, two-thirds of the programme's participants passed the centralized qualification exam and acquired the 2<sup>nd</sup> level professional qualification level. They started work in the prison's production unit, which enhanced their professional competences providing the opportunity for paid work and develop new social skills in labour relations.
- 2) Data on the size of the prison population is not publicly available. However, it can be stated that from 2007 to 2009 in Jelgava Prison 16% of the target population of the programme [prisoners aged from 25 to 64, with elementary education but having no specific profession or occupation] were involved in the training. The programme was continued in 2008 and is still

- continuing with the involvement of other education providers.<sup>23</sup>
- 3) The programme, implemented in cooperation with Prison Administration of the Ministry of Justice of the Republic of Latvia, State Probation Service, Jelgava Engineering Plant, Jelgava Prison and an adult education institution (JAEC/Jelgava Adult Education Centre), is a good example of policy implementation where different level institutions cooperate at a practical level. The JAEC advises with the Administrative Office of the Prison. Then a collaborative phase follows for planning the professional development of prisoners and ex-offenders. *The collaboration is informal*, without any contractual obligations.
  - 4) It is an example of good practice in its innovatory approach by introducing workplace learning into educational practice.
  - 5) The model offered is quantifiable: 7 educators, 2 training coordinators, participated in programme delivery; the costs of the programme (calculated on the basis of the model's costs and its implementation) were €17,000 and its duration was 480 hours or 12 months.<sup>24</sup>
  - 6) The level of costs was related to the amount of work and funding invested in furnishing and equipping the premises for learning. In the case of JRPIC the costs were higher because the premises had to be arranged from "zero". Another institution implementing the programmes may work at lower costs, using existing facilities.

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<sup>23</sup> The project ended, and a new project started for the implementation of the piloted programme. The new project has been awarded to Jelgavas Amatniecības Vidusskola, a vocation school.

<sup>24</sup> 12,000 LS (or euro 17,000) was the cost for 2 educational groups. The cost below euro 100,000 is referred to the workshop place establishment and purchase of machines and instruments. At the moment at Jelgava centre the price is the same. The education of 10 learners group costs at JAEC are 8,571 Eur. or 6000 Ls. JRPIC catalogue is available at [www.jrpil.lv/picdown/kursi/inz\\_un\\_tehn/7\\_lokmetinatajs\\_mag.doc](http://www.jrpil.lv/picdown/kursi/inz_un_tehn/7_lokmetinatajs_mag.doc)

Normally the minimums costs from the State budget for one learner is 937 LS (euro 1,333) x 1,35 – 2,9 coefficient + study practicum social insurance (can vary depending on the institutions) x 10 learners + more as euro 26,660 for one group (<http://izm.izm.gov.lv/aktualitates/informacija-medijiem/2587.html>). The programme is then much higher in Jelgava.

#### *Project coherence*

1. *Coherence to the goals of the project:* by demonstrating their wish to learn, prisoners showed their readiness to be integrated into society, consequently on release they were provided with support in finding employment. It was a motivating factor.
2. *Provides the quality of education:* met the standards of the profession, met requirements for provision of teaching-learning aids, teachers' qualifications.
3. *Demonstrates patterns of equality of non-formal and informal education with formal education.*
4. *Provides learning outcomes corresponding to EQF Level 2: the system of knowledge, practical experience, develops communication skills, social skills and positive attitude towards oneself and society, autonomy in learning.*
5. *After the programme had been delivered the prisoners who achieved a qualification started working in the production unit of the prison whose equipment was provided by the enterprise.*
6. *After the piloting of the programme by JRPIC, Jelgava Trade Secondary school took over the organisation of training in the prison. At present Jelgava Trade Secondary school has started a discussion about implementation of a locksmiths' programme.*

#### *Quality of training path*

1. The difference between different providers relates to the quality of teaching-learning aids. For example, JRPIC has experience in working with adults that differs from the experience of other traditional vocational education institutions. Therefore, both in preparing teaching-learning aids and in delivery of the programme JRPIC staff used experience-based learning.
2. The teaching staff were professionals in several subjects; worked in a team; all of them had experience in intercultural learning and mobility as they have acquired education mostly abroad.
3. The teachers/trainers did not have a strict teaching load and timetable as in formal education. The contract signed by JRPIC contained an estimate but the institution was free to determine how to use the resources. The management of the institution was interested in achieving as good a result as possible and therefore managed the learning programme flexibly and paid the teacher/trainer for extra time to provide individual/personal tuition.

4. *The time and scope* were appropriate. The fact that all the prisoners after release could get employment and work as welders proved this. A positive feature was the interval between the training and the exam during which it was possible to use personal tuition as a new form of training for Latvia and thus individualise the training and run the learning process flexibly. In formal education this programme requires a minimum of 960 hours and runs for a year. There are also two-year and three-year programmes which include more general subjects. In non-formal education, continuing education programmes of the same type and level of qualification comprises 480 hours and can be delivered in two months. Of course, it also enables costs to be saved. Adults learn 8 hours a day, whereas students in vocational schools have fewer lessons a day. However, they could still complete the programme in half a year and not in one year. In non-formal education programme delivery is much faster. This is thanks to the efficient planning of time and technical materials.

*Limits of good practice*

- 1) In formal and non-formal education programmes the hours allocated cover vocational content only but formal education also includes general education subjects.
- 2) At present the global economic crisis presents obstacles for the implementation of such a programme. This is a critical moment because the programme's delivery model is vulnerable to external factors. Due to the unemployment phenomenon in Latvia, the Administration of prisons is motivated to set up workplaces for prisoners by self-financing and to make employers offer workplaces for ex-offenders.
- 3) A highly qualified inter-professional team took part in the programme's delivery. The team was very motivated, experienced, mostly male (just one female was involved) which is not typical of the situation in Latvia in general. Therefore there are limits on the how far this programme could be implemented across the country as the number of men in education in welding is marginal.
- 4) A detailed project evaluation was not required from JRPIC. The number of people who passed the exam and qualified may be seen as the most significant criterion. In the case of JRPIC some

of those who had started learning did not receive certificates. This was for the positive reason of being released from prison after finishing the programme. Education was free of charge only during the project, whilst afterwards ex offenders have to pay for it.

- 5) Analysis of cost efficiency was not undertaken. The adult education centre staff think that cost efficiency should be calculated taking into account the programme's results [the number of qualified people, reviews of the learning quality] and comparing them with the funds used. Renewed contracts should be offered to those education institutions with the highest cost efficiency coefficients.
- 6) Data on the contracts of other institutions is not available publicly. The selection of the schools has not been done in accordance with quality indicators. Applying to run such training gives the schools an opportunity to attract additional financing. JRPIC's experience showed how it could be organised. This is how schools have been involved. Schools are required to have a licensed programme and set quantifiable targets for the number of qualifications to be achieved. Monitoring and supervision were not carried out.

#### *Sources*

Jelgavas Mašīnbūves rūpnīca [Jelgava Engineering Plant] [www.companies.lv](http://www.companies.lv)

Jelgavas reģionālais Pieaugušo izglītības centrs [Jelgava Regional Adult Education Centre] [www.jrpic.lv](http://www.jrpic.lv)

Ieslodzījuma vietu pārvaldes Jelgavas cietums [Jelgava Prison of the Latvian Prison Administration and State Probation Service] [www.ievp.gov.lv](http://www.ievp.gov.lv)

Latvijas Izglītības un zinātnes ministrija [The Ministry of Education and Science of the Republic of Latvia] [www.izm.gov.lv](http://www.izm.gov.lv)

Latvijas Tieslietu ministrijas Ieslodzījuma vietu pārvalde [Prison Administration of the Ministry of Justice of the Republic of Latvia] [www.tm.gov.lv](http://www.tm.gov.lv)

Valsts Probācijas dienests [State Probation Services] [www.probacija.lv](http://www.probacija.lv)

Annual report of Jelgava Regional Adult Education Centre. Year 2007. [www.jrpic.lv/?ID=110](http://www.jrpic.lv/?ID=110)

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[http://sf.lm.gov.lv/equal/index.php?main\\_page\\_id=2&page\\_type=d\\_cat&second\\_page\\_id=&doc\\_id=10](http://sf.lm.gov.lv/equal/index.php?main_page_id=2&page_type=d_cat&second_page_id=&doc_id=10)

The project “New Solutions for Promoting of Ex-prisoners’ Employment” 2005-2007 of the European Community Initiative EQUAL

[http://sf.lm.gov.lv/CMS/modules/EReditor/jscripts/tiny\\_mce/plugins/filemanager/files/equal/EQUAL\\_projektu\\_produkti/VPD/prezentacija.pdf](http://sf.lm.gov.lv/CMS/modules/EReditor/jscripts/tiny_mce/plugins/filemanager/files/equal/EQUAL_projektu_produkti/VPD/prezentacija.pdf)

*Additional national/ local sources for adult basic education documentation available on line:*

Guidelines for the strategy of Lifelong learning

[http://izm.izm.gov.lv/upload\\_file/Izglitiba/Muzizglitiba/Pamatnostadnes.pdf](http://izm.izm.gov.lv/upload_file/Izglitiba/Muzizglitiba/Pamatnostadnes.pdf)

Programme for introduction of Lifelong learning policy guidelines 2007-2013 in the years 2008-2010, <http://izm.izm.gov.lv/nozares-politika/izglitiba/muzizglitiba.html>

The Cabinet regulations No.443 „Ieslodzīto izglītības politikas pamatnostādnes 2006.-2010.gadam” [Strategic Guidelines for Education of Imprisoned People for the Period of 2006-2010.] adopted on June 15, 2006.

The National programme „Ieslodzīto pedagoģiskās korekcijas programmu izstrāde, aprobācija un īstenošana” [Creation, testing and realization of the pedagogic improvement programme for imprisoned people] for the period of 2006-2010].



#### **1.4 Romania, Second Chance Programme (for Primary/Secondary Education)**

by Tania Sandu - Ministry of Education, Research and Innovation-Early Education, Schools, Performance and Programmes Department

##### *Problems faced*

The problem faced by the Second Chance Programme is the low educational levels of people who have not participated in compulsory education, and who are beyond the legal age for enrolling in mainstream school, like: disadvantaged young people and juveniles at risk; ethnic minority groups; disadvantaged and/or women who face discrimination; people with special education needs.

The Second Chance programme is a large national initiative coordinated by Ministry of Education, Research and Innovation and aims at combating the marginalisation and social and economic exclusion of young people who have not completed compulsory education and have not acquired the minimum competences needed for employment. It is a specific remedial programme for those who could not use the first chance offered by the educational system. The programme is offered at two levels: *Second Chance* (Primary Education) and *Second Chance* (Lower Secondary Education), the latter including a vocational training component as well.

##### *Lessons learned and the reasons that explain the relevance of the Good Practice*

The Ministry of Education, Research and Innovation initiative has succeeded in overcoming problems often encountered in disadvantaged communities: low rates of entry into the labour market due to the existence of a large number of individuals with no education or with a low level of education and without a vocational qualification. Certification of competences gives to these young people both access to the labour market and the opportunity to continue their studies at the next level of the educational system. For example, a graduate of *Second Chance* (Primary Education) may continue with mainstream secondary education and a graduate of *Second Chance* (Lower Secondary Education) may continue studies at the upper secondary education level or enrol in adult training programmes at higher level.

In the year 2008-2009, 4,848 students from all 42 counties were involved in the Second Chance for Primary Education and 5,204 students from 41 counties were involved in the Second Chance for Lower Secondary Education.

#### *Method used*

The implementation of the programme involved a number of elements, including measures to develop institutional capacity through:

- Developments of educational policy to regulate the implementation of the Second Chance programme.
- Organisation of training sessions.
- Development of curriculum and educational materials.
- Monitoring and evaluation.
- Information campaigns.

The programme introduced innovative elements in the curriculum for basic education, in assessment and in institutional delivery (i.e. in the organisation of the learning-teaching process). The programme provides an individual training programme and recognition of prior learning – acquired in formal, non-formal and informal contexts – based on both the curricular standards for basic education and the vocational training standards. The learners have the benefit of counselling and support services within the programme.

#### *Solution adopted to the initial problem*

The Second Chance Programme is part of a long term process: in October 1999 the current Second Chance Programme for secondary education was piloted, in 2002 the programme was revised under the Phare Programme with a special focus on Roma and in 2005 it was extended to the primary education level. In the academic year 2006 – 2007 the programme was extended nationally, so that it was implemented in 216 schools in 27 counties. Based on feedback from the pilot phase, the methodology was revised and trainers were trained at national level. The outcomes of the PHARE programme were accepted at educational policy level and the revised methodology was approved by Ministry of Education, Research and Innovation Ordinance. Thus, in the academic year 2008 – 2009 the programme was implemented in all 42 counties (268 schools for primary education and 173 schools for lower secondary education).

### *Transferability*

The Second Chance programme is a large scale programme and is a goal of educational policies of many European countries, which seeks to reduce phenomena related to non-participation in education and early school drop-out, facilitating the access to education and lifelong learning opportunity.

The European Commission proposed the Second Chance Schools scheme in 1995 in order to combat school failure and social exclusion. It was set-up on these four general characteristics of the programme: partnership with local authorities, social services, associations and the private sector; a teaching and counselling approach focused on the needs of individuals; stimulation of active learning on their part; flexible teaching modules; and a central role for the acquisition of skills through new technologies.

The educational approach used within in the “Second Chance” Programme could be transferred to traditional mainstream education – a modular and competence-based curriculum, for basic education and for assessment of prior competences, individualised learning, a differentiated approach, the use of real life examples, and the use of student-centred methods.

From our experience we learn that there are needed determined investments in staff to make sure that the Second Chance programme quality is comparable with the first chance

### *Weak and strong aspects*

As weak points we can identify the implementation process which should be reviewed, the teachers are not enough trained for working with adults and the inappropriate teacher training in relation to the learning needs of disadvantaged adults which makes quite difficult their integration and retention in school.

As strong points we can mention that the programme improved prospects of employment, arising from the attainment and certification of professional vocational competences through a combination of continuation of study, by individualised learning and recognition of prior competences. In this context, a cost/benefit analysis indicates:

- the average per capita cost of schooling comes to €600 per year;
- the average per capita cost of unemployment comes to €1,916 per year (Annual statistics 2007 - [www.insse.ro](http://www.insse.ro)).

Also, high interest in the programme shown by the community and usefulness of the programme, proven by the significant number of people from different categories enrolled in the programme; relevance, flexibility and usefulness of the programme, which has been adapted to the participants' needs; the learning model provided by the curriculum and the educational materials highlights the strong aspects.

### *Description of the case study*

#### *Background*

The *Second Chance* programme has succeeded in **overcoming problems**, often encountered in disadvantaged communities, of low levels of labour market participation due to the existence of a large number of individuals with no education or with a low level of education and without a vocational qualification.

The main goal of the *Second Chance* programme is to reduce the school drop-out rate by supporting all those who are at least four years over the legal school leaving age and who dropped out of compulsory education for social reasons so that they can complete their basic education and undertake vocational training for level 1 qualifications (corresponding to the 2<sup>nd</sup> EQF level).

Target groups:

- *Primary level:* anyone (teenager, young person, adult) who has never enrolled in school or has not completed primary education, is at least four years over the legal school leaving age and is in one of the following situations:
  - has not participated at all in formal education;
  - had been enrolled at primary education, but dropped out – no matter when or for whatever reason;
  - has not completed primary education by the age of 14.
- *Lower secondary level:* anyone (teenager, young person, adult) who has completed at least primary education (including the primary education offered by the Second Chance system) or has completed compulsory education up to and including seventh grade and who is over 14 (in accordance with the programme remit).

*Typology of end--beneficiaries:* disadvantaged youngsters and juveniles at risk; ethnic minority groups; disadvantaged women and/or women who face discrimination; people with special education needs.

*Other beneficiaries involved:*

- at educational system level: trainers, teachers, school mediators, school inspectors and principals who benefited from training related to the normative framework of programme implementation, curriculum, educational materials, evaluation of students' competences, monitoring procedures, evaluation and reporting of the programme's delivery;
- members of local communities.

The programme started in 2006 with the following targets:

- 5,000 students to be involved in the programme annually;
- 75% of students to graduate from the Second Chance - Lower Secondary Education Programme and 65% of graduates to progress to employment.

To develop this concept policy measures were devised for:

- preliminary planning research;
- target identification studies;
- programme framework;
- financial support for implementation;
- basic skills and knowledge recovery strategies;
- vocational training courses aimed at specific professional profiles and industry sectors;
- psychological empowerment and motivational support;
- training of trainers, teachers and managers in the educational system;
- delivery services (methodologies, curriculum and educational materials for teachers and students);
- dissemination activities.

In addition, the following trans-national activities have contributed to the achievement of the project goals:

- the programme design and the development of organisational and implementation methodologies were built on good practice examples from other European countries' organisation and implementation models;

- the expertise of foreign experts was used in the development of curriculum and educational materials;
- the approach taken to the assessment of professional competences acquired in non-formal and informal contexts has been based on a methodology developed in line with European practices.

Today, the programme is aligned to European and national strategic priorities, it fosters learning and competence attainment and it creates opportunities for continuing learning and employment. The programme may be extended and developed by means structural funds, as it falls within one of the priority lines/objectives of the Operational Programme in the Human Resources Development Sector.

#### *Description of the solution*

The *Second Chance* programme is part of a long term process:

- In October 1999 the current *Second Chance* programme for lower secondary education<sup>25</sup> was piloted in 11 schools from 7 counties, for 225 students and developed its methodology and curriculum and organised the training of teachers in pilot schools.
- The programme was revised in 2002, under the PHARE Programme RO 0104.02, Access to Education for Disadvantaged Groups with a Special Focus on Roma, in order to adapt it to the new structure of compulsory education. This involved extending the programme and developing the curriculum. In 2005 it was extended to the primary education level, under the PHARE Programme 2003/2005-551.01.02, Access to Education for Disadvantaged Groups.
- Starting in academic year 2006 – 2007, the programme was extended nationally so that it was implemented in 216 schools in 27 counties. Based on feedback from the pilot phase, the methodology was revised and trainers were trained at national level.
- The outcomes of the PHARE programme were accepted at educational policy level and the revised methodology was approved by Ministry of Education, Research and Innovation Ordinance. Thus, in the academic year 2008/2009 the programme was implemented in schools in all 42 counties in:

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<sup>25</sup> Secondary education and apprenticeship schools – vocational education providing level 1 qualifications.

- 268 schools for primary education;
- 173 schools for lower secondary education.

The Second Chance programme is co-ordinated by the Ministry of Education, Research and Innovation and the partners are:

- County School Inspectorates (CSI) and schools, for planning and organisation of programme delivery in schools, methodological support and programme monitoring and evaluation;
- Teacher Training House for teacher training;
- Local authorities, county agencies for employment, non-governmental organisations, professional associations, to raise awareness of the programme and support trainees to complete their studies and find employment;
- employers, to provide practical training sessions within the professional training programmes.

Staffing:

- Ministry of Education, Research and Innovation: 2 programme officers (1 responsible for primary education and 1 for lower secondary education);
- County School Inspectorates: 1 programme co-ordinator in each county where the programme is implemented;
- schools: 1 coordinator in every school delivering the programme;
- teachers.

Funding providers:

- in the counties and pilot schools where the Second Chance programme was being delivered as part of the PHARE Programme, funding was provided by the EU and the state budget;
- in other counties and schools, funding is provided from local and state budgets.

The programme introduced innovative elements in the curriculum for basic education, assessment and institutional evaluation (i.e. in the organisation of the learning-teaching process). The programme provides an individual training programme and recognition of prior learning – acquired in formal, non-formal and informal contexts – based on both the curricular standards for basic education and the vocational training standards. The learners have the benefit of counselling and support services within the programme.

### *Methodology*

Implementation of the programme involved a number of elements, including measures to **develop institutional capacity**, through:

#### *a) Developments in educational policy to regulate the implementation of the Second Chance programme*

The national Second Chance programme framework is regulated by:

- Ministry of Education, Research and Innovation - Ordinance no 2268/28.09.2007 on the implementation of the Second Chance programme, approving the methodology for the organisation and implementation of the Second Chance Programme (Primary and Lower Secondary Education) and framework educational plans;
- Ministry of Education, Research and Innovation - Ordinance no 5160/06.10.2005 approving the curricula for the Second Chance Programme (Primary Education);
- Ministry of Education, Research and Innovation - Ordinance no 5735/29.12.2005 approving the curriculum for the Second Chance Programme (Lower Secondary Education);
- Ministry of Education, Research and Innovation - Ordinance no 5419/08.11.2005 on the approval of methods of organising and implementing the examination for the certification of professional competences required to obtain level 1 and 2 qualifications. This ordinance regulates the certification of professional competences for graduates of the Second Chance Programme (Lower Secondary Education).

#### *b) Organisation of training sessions*

Training sessions were run for school inspectors, school managers and trainers of the teachers involved in the organisation and development of the Second Chance (Lower Secondary Education). 210 trainers and school inspectors benefited from this training and were able to cascade it locally.

#### *c) Development of curriculum and educational materials*

Curriculum and educational materials for teachers, inspectors and managers delivering the Second Chance Programme were developed. Educational materials (73 titles) for students and teachers were developed and distributed at national level.



*d) Monitoring and evaluation*

Monitoring and evaluation of the programme included organising round tables, developing and applying monitoring and evaluation tools and publishing national reports on programme delivery. The 2007 monitoring and evaluation report identified perceptions; attitudes and needs related to the programme. At the same time, it generated new ideas to support and develop the programme, many of which may eventually be adopted by the education system. (Copoeru, L. Pop, V., Vermeulen, P., October 2007, *Raport de monitorizare si evaluare a programului „A doua șansă” în România*, [www.acces-la-educatie.edu.ro](http://www.acces-la-educatie.edu.ro)).

*e) Information campaigns*

These have included radio and TV broadcasts, brochures, newsletters, posters, prospectuses. A website: [www.acces-la-educatie.edu.ro](http://www.acces-la-educatie.edu.ro) has been launched and is kept updated.

At local level, county school inspectorates included in the PHARE Programme have benefited from grants. For the Second Chance component of the PHARE Programme, the grant covered expenses related to procurement of adequate equipment and materials for schools, payment of teaching staff and learners' transport. Educational materials for learners and teachers were developed and distributed at national level.

*Basic information about the Second Chance programme:*

The programme includes two levels: Second Chance for Primary Education and Second Chance for Lower Secondary Education (the latter includes a vocational training component as well). The standard length of the programme is 2 years for primary education (corresponding to four years of primary school). It is 4 years for the lower secondary education Second Chance programme corresponding to 5<sup>th</sup> to 10<sup>th</sup> grades in compulsory education (the first four years of lower secondary education are the 5<sup>th</sup> to 8<sup>th</sup> grades and the school of arts and trades are the 9<sup>th</sup> and 10<sup>th</sup> grades). The length may be reduced, depending on the competences already acquired by the student, either in formal or in non-formal and informal contexts; these competences can be assessed and recognised on demand.

The key features of Second Chance are:

- at curriculum level the study of each subject is based on flexible modules;
- curricular standards have been developed for each subject; as have assessment standards for each module within a subject;

- educational materials have been developed so that there is a Learner's Guide and Teacher's Guide for each module;
- integrated teaching-learning of natural sciences (Biology, Chemistry, Physics);
- definition of the learning content through an inter- and trans - disciplinary perspective based on the general and specific competences that are common for the subjects included in the programme;
- the curriculum targets the development of general competences which the learners will develop as a result of participation in cooperative learning activities in groups, in real contexts, through tasks and assignments appropriate for their interests and needs;
- recognition and use of life experience gained by the learners in the learning process;
- the learners integrate new attainments in their own experience;
- the diversity of every learner's profile, cultural or other, is considered to be learning resource and can be used as such;
- a practical and functional approach, investigative learning and problem-based learning;
- allocation of an additional number of hours (determined by the school) for the basic education modules to allow for the identification of the various individual learning styles and needs, for a differentiated approach to learning and to contribute to increasing learners' self-esteem;
- competence-based assessment, after completion of each module, there is an assessment of the general competence of the module;
- at institutional level: there is a flexible timetable (the modular structure enables delivery to be organised according to learners' needs: in the evenings, on Saturdays, during certain periods of the year depending on their seasonal activities etc.);
- provision of basic education (equivalent to compulsory education) while training for a level 1 qualification;
- provision of an individual training programme for each learner;
- recognition of prior competences acquired in formal, non-formal and informal context, including competences acquired at the work place or in an adult training programme;
- the school provides the training programme in partnership with employers or with other schools;

- from a partnership development perspective: the programme fosters social partnership development, as the school partners are employers, local authorities, the County Employment Agency, non-governmental agencies and professional associations. The school mediator plays a crucial role in raising awareness about the programme at community level.

#### *Learner recruitment*

The following activities are undertaken for learner recruitment:

- distributing information about the Second Chance programme (brochures, booklets, round tables);
- at school and county schools inspectorate level there are support committees which include members of the local community who play a role in the marketing activities as well;
- the school mediator is the person (from the community) who ensures the link between school and community;
- the school where enrolment takes place is also responsible informing and counselling applicants about the programme's duration, curriculum, timetable, programme outcomes etc.

#### *Training methods adopted*

**For learners** the methodology includes:

- practical activities;
- an individual learning programme;
- learner-centred learning;
- investigative and problem-based learning;
- counselling and support.

**For teachers** the training programmes for the project county teams included an inaugural conference and three training seminars. The training courses focused on an analysis of the educational situation in the counties and on the development of an inclusive educational strategy. The trainers for the Second Chance programme benefited from additional training on issues related to adult training, student-centred learning, development of school-community-employer partnerships, implementation of a modular curriculum and use of educational materials and assessment.

## *Results and impact analysis*

### *Results*

In 2007, among the activities organised by Ministry of Education, Research and Innovation through the PHARE 2004 project, Access to Education for Disadvantaged Groups, there was a monitoring and evaluation process dedicated to the Second Chance programme (using questionnaires, interviews, round tables with the participation of trainees, teachers, school managers as well as partners: local authorities, employers, NGOs etc.) to determine the strengths and weaknesses of the programme and contribute to future activities planning.

a) Statistical data from the 2007 evaluation report<sup>26</sup> and in the Ministry of Education, Research and Innovation's database<sup>27</sup> is given below:

➤ *Number of participants in the school year 2008-2009 (approx. 10 000):*

- by age:

- under 16 years: 20%;
- 16-20 years old: 32%;
- 21-30 years old: 36%;
- 31-40 years old: 9%;
- over 40 years: 3%

- by gender:

- male 58%;
- female: 42%.

➤ *Participants' (occupational) profile:*

- Agriculture: 16%;
- Food industry: 6%;
- Textiles: 12%;
- Construction: 16%;
- Metalwork: 14%;
- Mechanics: 10%;
- Car industry: 16%;
- Electronics: 9%;
- Tourism: 1%.

➤ *Students' ethnicity*

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<sup>26</sup> Copoeru, L. Pop, V., Vermeulen, P., (October 2007), *Raport de monitorizare si evaluare a programului „A doua șansă” în România*, [www.acces-la-educatie.edu.ro](http://www.acces-la-educatie.edu.ro).

<sup>27</sup> Ministry of Education, Research and Innovation, ([www.edu.ro](http://www.edu.ro)).

Table 1 – Students' ethnicity

<b>Ethnicity</b>	<b>Primary education</b>	<b>Lower secondary education</b>
Romanian	20.4%	43.6%
Roma	74.5%	56.1%
Hungarian	5.1%	0.2%
Others	0.1%	0.0%
No answer	0.1%	0.2%

A brief comparative analysis between past and present programme achievements indicated the following:

➤ *In 2006-2007:*

- 3,993 students from 27 counties were involved in the Second Chance for Primary Education;
- 2,354 students from 27 counties were involved in the Second Chance for Lower Secondary Education.

➤ *In 2008-2009 :*

- 4,848 students from all 42 counties were involved in the Chance for Primary Education;
- 5,204 students from 41 counties were involved in the Second Chance for Lower Secondary Education.

b) Significant outcomes were judged to be:

- development of the normative framework;
- curriculum development;
- development of educational materials (73 titles);
- 168 teachers' trainers trained; 42 school inspectors and directors trained;
- development and implementation of monitoring and evaluation methodology for the programme implementation.

c) *Innovative elements*

The programme introduced innovative elements with regards to the curriculum for basic education, evaluation, as well as institutional innovations (organisation of the teaching/learning process).

The programme ensured an individualised training design and recognition of prior learning acquired in formal, non-formal and informal contexts that meets the requirements of both the curricular standards for basic education and by the vocational training standards.

In its conclusion, the evaluation report evaluation highlighted the following items:

- a significant number of student enrolments in the programme (10,000 students in the school year 2008/2009);
- the majority of the students are in the 16 – 30 year age group;
- most are registered as unemployed and trained in traditional occupations;
- participants consider that the programme is relevant, useful and beneficial for them;
- schools appreciate the model of learning offered by the curriculum and educational materials;
- teachers are considered to be competent, but still insufficiently trained; (210 trainers and school inspectors benefited from training for the Second Chance programme which they cascaded at the local level);
- the programme responds to the needs of the community while the implementation process should be reviewed;
- the programme is attractive for the following reasons:
  - it is flexible, adapted to specific conditions and individuals' needs and has a modular structure;
  - students can enrol twice a year (September and/or January);
  - groups of students are small: 8-15;
  - the curriculum focuses on skills development and on the assessment and certification of prior competences;
  - students receive additional support throughout the training period.

### *Impact*

The most relevant achievement of the programme in terms of benefits to its end-users is related to improved prospects of employment, arising from the attainment and certification of professional vocational competences through a combination of continuation of study, by individualised learning and recognition of prior competences.

At national level, according to data published in the Report on the State Education System - 2008 ([www.edu.ro](http://www.edu.ro)), there is an upward trend in school staying-on rates, in broad terms. Analysis of specific staying-on rates related to students' age has shown, both for primary education and for lower secondary education, an increased proportion of students remaining in education beyond the official age limits for these levels. In Romania, both in the mainstream education and in the Second Chance programme in

the academic year 2007/2008 approximately 17% of pupils were over the age of 10 in primary education and approximately 22% of students were over the age of 14 in lower secondary education.

The most significant achievement of the programme in the community is an increasing employment rate. In 2007, compared to the previous year, the employment rate of population from the age of 15 to 64 registered a 0.5 % increase to reach 57.9%.

**In this context, a cost/benefit analysis** indicates:

- the average per capita cost of schooling comes to €600 per year;
- the average per capita cost of unemployment comes to €1916 per year (Annual statistics 2007 - [www.insse.ro](http://www.insse.ro)).

In order to evaluate the role of the “Second Chance Programme” in reducing the number of young people/adults who have not completed compulsory education, in 2009 there will be an impact evaluation and dissemination of the programme results under the PHARE programme, Access to Education for Disadvantaged Groups.

### *Conclusion*

In conclusion, the strengths of the programme are:

- high interest in the programme shown by the community and usefulness of the programme, proven by the significant number of people from disadvantaged groups enrolled in the programme;
- relevance, flexibility and usefulness of the programme, which has been adapted to the participants’ needs;
- the learning model provided by the curriculum and the educational materials;
- training provided for teachers and managers in the educational system (school inspectors and principals).

The educational approach used within in the “Second Chance” Programme could be transferred to traditional mainstream education – a modular and competence-based curriculum, for basic education and for assessment of prior competences, individualised learning, a differentiated approach, the use of real life examples, and the use of student-centred methods.

The development of institutional capacity at national and local level, the extension of the programme and its adaptation to the students' needs, as well as the access to European funds will ensure the programme's sustainability.

*Sources*

Copoeru, L. Pop, V., Vermeulen, P. (October 2007), *Raport de monitorizare si evaluare a programului „A doua șansă” în România*

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## **2. LEARNING AT THE WORKPLACE FOR PROFESSIONAL QUALIFICATION AND BASIC EDUCATION**

### **2.1 Germany, German at the workplace**

by DIE-Deutsches Institut für Erwachsenenbildung, Leibniz Zentrum für Lebenslanges Lernen

#### *Problems faced*

In Germany, even untrained employees, working in the production sector, meet the demands of continuously raising demands as regards their reading and writing skills. More frequently, the demands of the increasing digitised society and work environments raise the need of enhanced literacy skills in addition to the concrete job-specified skills. More and more tasks and tools even in fields of activity like cleaning, health care, service or the production sector require a proficient level of reading and writing. These required skills constitute difficulties for workers who are not able to meet the demand due to their lack of language competences.

A new concept is now presented by in-house implemented work-related training. The coordination centre “German at the workplace” draws up modular German language training which is strictly linked to specific fields of work, materials and environment.

Companies can charge the coordination centre with their training needs for workers. Associates from the coordination centre visit the companies and examine the work surroundings, the staff members, the working tools and the workflow. According to these insights and perceptions they create a tailor made training concept with modules individually adjusted to the particular in-house training at the company. Subsequently, selected trainers become acquainted with the specified module contents and teach the courses locally, in the companies.

The following Case Study presents one example of how the training is implemented at a German Animal Feed Producer company. Modules have been individually designed and adopted with the workers at the company. The evaluation of this concrete implementation shows that this in-house training has been well received and is an efficient training variation to

improve language skills in the company untrained workers with language difficulties.

The good practice is selected for in-depth case study due to the traceable illustration of the conceptualisation and implementation of a workplace based training that is targeted to the respective participants and their work environment. The concept of “German at the workplace” is quite complex, because the training modules are individually designed and adjusted even after more preliminary work of analysing the particular workplace and requirements. However, this supplementary effort seems to pay off when the learning outcomes increase because the learners can relate to the subject matters as they are relevant for them. The specific approach is evidently approved as the German Federal Office for Migration and Refugees (BAMF) seized the idea and plans to finance work-related language courses in the future. Moreover, the model of work-related German language courses was included as an integral component of the national European Social Fund (ESF) programme which is another indicator showing that work-related training is of considerable importance as a qualification method for future in-house training and qualification of workers.

#### *Lessons learned and reasons that explain the relevance of the Good Practice*

The Coordination Centre, *German in the Workplace*, which is a part of the *passage gGmbH* deals with work-related German.

The project was supported within the framework of the North German Network for the Professional Integration of Immigrants development partnership (NOBI), from 2005-2007, during the EQUAL Initiative and funded with resources from the Ministry for Labour and Social Affairs (BMAS). It is part of the *Integration durch Qualifikation* Federal Network. From 2008-2010 the project is funding exclusively by the BMAS.

One of the main tasks of the project is to develop training programmes for companies and adapt learning methods and materials which are relevant to the respective target group or company. As part of the project, a website was created as a platform for pooling ideas and sharing materials ([www.deutsch-am-arbeitsplatz.de](http://www.deutsch-am-arbeitsplatz.de)). Work-related training and learning materials are available on the platform. The other strand of the project comprises pilot in-house training programmes developed and tested in companies.

Demands on employees' reading, writing and other communication skills are steadily increasing in Germany. At every level, employees have to deal with a growing number of challenges to their literacy skills. Changed forms of work organisation (e.g. increased teamwork, job rotation or quality circles) demand increased and reliable cooperation. Sharing information and problem solving strategies are gaining in importance. Understanding written documents and the ability to describe work processes comprehensibly to third parties are critical for safeguarding quality systems and certification.

In-house continuing training is thus becoming an integral part of the daily work of employees who wish to secure their jobs, by addressing the new challenges.

The Co-ordination Centre, *German at the Workplace*'s strategy focuses on this specific challenge: the need to improve language skills and meet demands arising from changing work processes are addressed and integrated within specially designed programmes for in-house training. The main objective is to link communication, reading and writing skills – especially with regard to migrant workers - and ultimately to improve proficiency. Workplace-related language skills (for instance, work-specific hygiene or safety regulations) are improved and developed.

Drawing on identified work-related and individual needs, the Coordination Centre, *German in the Workplace*, offers to design and deliver customised programmes for in-house training in companies. The focus is on the language skills specific to a particular company which are identified on site by observing and analysing work processes. The findings result in the development of a carefully designed strategy for the company and ultimately influence the customised module developed for continuing training. Suitable trainers are selected and trained to implement the training plan which has been agreed upon, as are the corresponding training and learning materials.

The entire training programme is suitable for workers who wish to improve their communication and language skills in addition to coping with the demands of German language in the workplace.

### *Method used*

#### The Coordination Centre, German at the workplace

In Germany, access to the labour market and participation in social life are highly dependent on German language skills. Without denying the importance of migrants' literacy skills, it must be emphasised that the primary aim of the NOBI Network and the Coordination Centre, *German at the workplace*, it established, is to find solutions which emphasise the responsibilities of society, the labour market, and the companies themselves. Here, too, a contribution can be made to improving the position of employees with low literacy skills and to fostering integration. The prime purpose is to enable migrants with limited German language skills to participate in cultural, social as well as working life without, however, demanding one-sided assimilation.

The Coordination Centre, *German at the workplace*, assumes that workplace-related language skills training can only be developed by taking into account particular work processes and contexts. The main objective is not just to offer German courses, but within this process, to support learners to identify the specific language needed for their work and, thus, to eventually improve all work communication and work processes. The Coordination Centre regards German language training as a way of facilitating the acquisition of language skills, adapted to a particular workplace, as an instrument for personnel development promoting long-term employability.

Based on the assumption that language proficiency is a key communication skill for the workplace as well as a pre-condition for access to education, social and cultural networks and, not least, to independence, the Co-ordination Centre's first step is to address the language element of training in order to release other resources for further qualifications. This initiative takes it as read that language proficiency and the ability to express oneself are interdependent elements of one's identity.

For this reason, in the courses offering second language learning, the participants' individual biographies, their learning requirements, learning trajectories and methods must be integrated and interlinked.

Linking specific learning needs with the demands of the labour market means that the Coordination Centre has to work in different areas, for instance in the development and adaptation of training, PR work, advising

employers and employees, research and practice. In this context, measures and courses are developed which are monitored by staff from the Coordination Centre, and finally evaluated. The policy of not separating the different areas of work but integrating them all into an employee development programme is the feature that distinguishes it from other qualification projects. Thus, the approach of the Coordination Centre, *German in the Workplace*, is an example of good practice in the area of further qualification of low-skilled workers in Germany.

New teaching methods and materials are developed for each training course, and a suitable methodology is selected for each project. Two of the most popular and recommended methods are described in the manual *Sprache-Macht-Demokratie* (Ulrich; Wenzel 2006: *Praxishandbuch – Sprache – Macht – Demokratie*), which also outlines practically tested and evaluated methods and exercises. These include language skills - language and self-determination and their interrelationship. The handbook begins with a description of the theoretical background and, in the second part, there are suggestions for specific themes and headings for modules and methods, such as:

- Module 1: Introduction.
- Module 2: Language and Identity.
- Module 3: Language and Power.
- Module 4: Language and Democracy.
- Module 5: Implementation and Transfer.
- Module 6 : Evaluation.

Although the programme explores the theoretical aspect of grammar, the Coordination Centre includes other more technical or practical methods taken from different sources and from the manual: *Methoden-Handbuch Deutschsprachiger Fachunterricht* (Leisen 2003) which offers practical methods and materials for German language courses for each level. The manual is designed as a guide and collection of materials for course instructors and learners with a wide range of exercises, materials and techniques for second language teaching at all levels, and takes different learning demands into account.

The methodological examples are merely a selection to show how the Coordination Centre operates and on what the development of company training is based. The example of good practice, as presented in the description of a training programme in the next section, was designed using

a method with a stronger focus on the learners and their particular situation at the workplace:

The method, called the *Topics Scenarios Assignments* (TSA) approach, involves developing topic-, scenario- and assignment-related modules where each has been previously identified and analysed on site. The typical use of language in the workplace in the respective company is documented, with reference to vocabulary and grammar structures actually used, including how disputes occur or conflicts are settled. It is the task of the Coordination Centre to select suitable teaching and learning material which should be mainly authentic workplace documents (such as forms, safety or hygiene regulations, minutes etc.).

The Coordination Centre selects and appoints the trainers. The latter must be experienced in work-related language training and have both didactic and methodological knowledge of the particular work objectives. The trainers ultimately base their training plans and delivery on the analysis of the workplace-related language requirements.

Coordination Centre staff observe individual training sessions which are evaluated afterwards by the trainers and trainees. An audit by either the management or staff from the human resources department in addition to an audit by Coordination Centre staff is built in to the training plan.

#### *Solution adopted to the initial problem*

This section describes an example of the implementation of the Coordination Centre, *German in the workplace*, programme. The example is an in-house workplace training course which was developed in cooperation with a language institute and delivered in 2007 to 400 employees at an animal feed production company.

The employer's objective was to increase the involvement of poorly qualified but long-serving employees in the optimisation and innovation processes introduced as part of a structural re-organisation of the company. The intention was to permanently safeguard the workplace by enhancing work-related language. This process was to be embedded in a general personnel development strategic plan aiming at improving company

communication in general – and not only for employees from migrant backgrounds.<sup>28</sup>

Within the framework of the language needs analysis it is essential, from the outset, to examine work and production contexts in order to gain an impression of standard work processes and working conditions. Through such an examination the work processes become more transparent which in turn facilitates both the conceptualisation and writing of the module. The staff who undertook the language needs analysis also participated in staff meetings and in health and safety training at the workplace. The trainers were, in this case, the safety officer and the head of department. The training content was presented in very formal technical language, which demanded much higher language skills than the majority of employees possessed. After the health and safety training, participants were first asked if they understood the subject-matter and then to demonstrate that this was indeed the case; this showed that it was essential to offer more German language training appropriate to the particular working conditions and learning needs. For further analysis, other senior staff in the company were asked their opinion on specific language requirements in the company, for example:

- How do employees have to communicate in their daily work?
- In which areas of work do employees have to be qualified in order to fulfil regulations?
- Where are there specific communication difficulties?

The results of the analysis showed that training should mainly focus on being able to describe work processes to a third person, as well as on understanding written and oral work instructions. It was emphasised that in further training courses everyone should be encouraged to ask again if something had not been understood, and to specify their own needs.

At the beginning, the workers were questioned about their own language needs. The following needs were repeatedly mentioned:

- The ability to describe machine breakdowns or malfunctions.
- Overcoming uncertainties and nervousness when speaking.
- To be able to write correctly.

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<sup>28</sup> The practice is for everyone suffering from lacking German language.

- To use oral skills to deal with unexpected situations, for instance: machine breakdowns, accidents, new machines, new work environments.
- To familiarise themselves with the machines (regarding technical terms, abbreviations etc.).
- In private matters: talk to the doctor, understand an official letter.

The shift leader and the works council were also asked about the main language requirements, whereupon the following requirements were listed:

- Communication in general should be improved.
- Workers should be confident enough to repeat questions.
- The ability to describe malfunctions, to understand new machines, to be more flexible in the future.
- The ability to resolve conflicts.
- To express one's own point of view.
- To make suggestions.
- To be informed of their rights and duties.

After the employees' meeting, those employees who were selected to participate in the language skills training were asked to attend a separate meeting. Members of the personnel development department took the opportunity to once again point out the advantage of training and answer the workers' remaining questions. The prospective participants then had the opportunity to meet their prospective trainers who introduced themselves and presented the training contents and targets.

### **Planning the modules**

The results of the language needs analysis were used as the basis for planning the modules. The overarching target of the course was to be a general improvement in communication in the workplace, which ultimately would have a supportive impact on the workers' ability to contribute their competences and ideas. Another overall learning target was to develop language strategies for asking questions and checking comprehension. The main focus lay on the language needs of the participants who were encouraged to bring their expertise into the training process. The modules were developed in the course of the training so that changes and unforeseeable needs could be taken into account.

The following modules were developed:



## **Module 1**

### **Getting to know one another, introductions, future plans, wishes, lifelong learning**

Who am I? Where do I work? What are my plans? What are my personal and career/job aspirations? What does lifelong learning mean? Why am I taking part in this course? How will I profit from this course? Clarifying and agreeing on the rules in the course.

#### **Analysis of the individual language needs of participating workers**

My language skills: strengths – weaknesses, specific learning needs. What can I do well in the German language? What can I not do so well? What will I achieve on this course? Which language knowledge and skills are especially important for my workplace (reading /listening/speaking)? Where are my difficulties

#### **Participant as “language needs investigator/observer“ in the workplace.**

The focus here is on the language demands that each participating worker has to deal with. It also acts as an introduction to the methods and opportunities to identify one’s own language needs and to include them in the training (notices, notice board, work and safety instructions, information, announcements in the cafeteria, communication situations and intentions etc.), promoting confident use of language, increased confidence with regard to questioning and answering.

## **Module 2**

### **Production and work processes – What do I actually do with my machine?**

Describing workplace and operational procedures, describing machines, tools and instructions.

Being able to understand and describe the complete production process, from delivery to the finished product.

## **Module 3**

### **Work instructions – Strategies for understanding work instructions**

Understanding, explaining and passing on work instructions, understanding instructions in written form on the displays of machines, understanding and simplifying texts, practising reading strategies, comprehension questions.

## **Module 4**

### **Describing breakdowns: My machine is out of order**

What is damaged? What are the names of the faulty parts? What are typical malfunctions? Who can repair it (electrician, engineer)? What spare parts are needed? Improving communication with the engineer, breakdowns under time pressure, describing a break-down on the telephone.

### **Ongoing training in communication strategies**

What does communication mean? With whom must I talk about what? What type of communication difficulties occur? Why? Strategies in stressful situations, strategies for dealing with unknown words, asking/checking, expressing incomprehension, requesting a repeat, communicating one's point of view briefly. How do I react in conflict situations? Improving communication with top-level management/executives, reducing insecurities, small talk.

The modules 1-4 were designed for a training period of about 80 sessions. The following modules were based on the language needs analysis and build on the four basic modules.

### **Module – Suggestion scheme/ suggestions for improvements**

How does the suggestion scheme function in the company? How can I hand in suggestions? What does the relevant form look like? What should be taken into account?

### **Module – Team meetings**

**Why are there team meetings?** Making suggestions and giving constructive criticism, proposing suggestions for improvements. Correctly understanding and filling in the forms for submitting suggestions.

### **Module – Safety at work**

**Why safety at work?** Being able to understand and communicate safety instructions, understanding the content of safety at work training, recognising and preventing hazardous situations. What should be done in the event of an accident? Passing on help and information quickly.

### **Module – Rights and Obligations**

#### **Company agreements**

What is the content of the company agreement? Why are company agreements important? The ability to understand and talk about company agreements.

Wage agreements

What is a wage agreement?

Holiday planning

When may I apply for my annual leave? What must I consider when applying for holidays? Inviting the works council for questions and answers on the topic of rights and obligations.

### **Course schedule**

The course comprised two weekly sessions of 45 minutes each, either before the late shift or after the early shift. All the employees worked in a rotating shift system so that each employee had an alternating shift in the week. In order to guarantee continuity for every employee, the course took place twice a week. The participants were not given time off from work to attend the course, but had to attend during their own time. Participation was free; the company paid the trainer's fee.

### **Course management**

The language institute cooperating with the company provided the trainer to deliver the course. The trainer was involved beforehand in the language needs analysis and in inspecting the production and work environment. The modules were developed in cooperation with staff from the Coordination Centre who had expertise in designing and delivering work-related language courses.

The trainer familiarised himself with the production processes and the technical terminology with support from the heads of department and the shift leaders. The participants were included in course development as experts on the production procedure, while the course management provided the language support. The course was partly team taught with staff from the Coordination Centre to provide more intensive support for the participants as well as a didactic-methodological exchange between the teachers.

### **The participants**

The participants – mostly men – came from different countries and had a varied knowledge of German. The majority had started their working life without ever having studied German or attending any other language course. Their period of employment in the company varied from between 5 to 15 years. Most of them had learnt German, as an additional language informally in the workplace through communication with colleagues. In many cases these were learners with little experience of formal education,

and with a limited knowledge of grammar, sentence structures, parts of speech and so on.

### *Transferability*

The overall learning target was to increase workers' literacy skills, and in particular, their communication skills. The learning target of the second module, *Production and Work processes*, was intended to enable participants to describe their workflow orally. Assessing the achievement of this type of learning target is a conceptually suitable form of evaluation as the participants are not set tasks which are irrelevant to their daily work.

A part of the evaluation process was to check whether the participants could, by the end, describe their machines and the production flows. Heads of departments and human resources staff were invited to evaluate the results of the modules which were presented to them by the participants.

A positive sign after the first few weeks of the course was to see how highly motivated the participants still were when they attended their sessions. This was because their personal expertise in work processes was elicited and valued, and their individual language learning needs were being taken into consideration. The company management also commented positively on course delivery.

The participants actively participated in the sessions and stayed motivated although they had had to attend the course in their own time or after their shift. As, in line with Coordination Centre policy, the training was tailored closely to the participants' language, and the topics and materials focused exclusively on their daily work, the participants' motivation remained constant and enduring despite the extra time pressure.

### *Weak and strong aspects*

The course was assessed by the various stakeholders involved in the qualification scheme: the works council, the heads of department and the shift leaders, the participants and the personnel development staff. The general conclusion was that the work-related language course was considered a success. It must be emphasised that the key factor influencing success, other than the enduring motivation, was involving the participants

in designing the course wherever possible. Another possible reason for the positive outcome of the evaluation might be the specific reference to the work contexts in the course. In addition to the identified improvements in the participants' language competence, a sense of empowerment was apparent among the workers on completion of their course. This suggests that self-empowerment and increased self-confidence leads to increased autonomy of the workers and, ultimately, to a more positive working atmosphere.

Implementing the in-house training was made possible because the language learning needs of the workers were recognised and expressed within the company. The need to actually offer an in-house training course for employees led to finding suitable partners to develop relevant training programmes that were tailored to the needs of the company. In this context the personnel development department provide the key interface for communication between the Coordination Centre and the company.

The elements outlined above are essential for successfully developing a strategy for in-house training in German at the workplace. All the factors mentioned above are indispensable for successful implementation, and each of those involved has to act reliably and competently. These requirements were fulfilled in selected example described above, which is why this example can still be evaluated as a success. An additional conclusion to the final evaluation is that an investment in in-house training safeguards the jobs of low qualified employees in the long-term and/or increases employability.

### *Perspectives*

In-house training opportunities could be provided and co-financed within the framework of the *EQUAL* programme as pilot courses. The results highlight the potential for developing a needs-based qualification in the company. Equally, they indicate an obvious need for qualification schemes. Creating consistency in in-house training courses for the low-qualified, as implemented in the Coordination Centre, *German in the workplace*, programmes should be prioritised for the future.

Companies should receive support when accessing funding for training courses for their employees and for the development of needs-based

qualification schemes to secure jobs. The Federal Office for Migration and Refugees (BAMF) is planning to finance more work-related language courses.<sup>29</sup> In the first instance pilot courses in several large cities will be delivered in order to continue testing implementation. Within the framework of these work-oriented language support schemes, employers will continue to be able to offer such qualification measures – with financial support from the BAMF.

Apart from this quite promising initiative it should also be noted that the model of work-related German language courses as developed by the Coordination Centre, *German at the workplace*, was included as an integral component of the national European Social Fund (ESF) programme ([www.esf.de](http://www.esf.de)) in the work-related second language support programme in Germany. One of the reasons for this is that the Coordination Centre, *German at the workplace*, had already worked on several programmes where the approach was developed and used, as well as because of the positive evaluation outcomes.

In summary, the development of in-house qualification schemes that contextualise language for the workplace by the Coordination Centre, *German at the workplace* seems to be a promising approach.

Strong aspects	Weak aspects
Tailor-made concept, modules and training regarding the respective company, tasks and workplace	
Employer invests in the qualification of the workers and finances the in-house training	A high demand on workers for they have to spend additional hours of their spare time to learn before or after shift work, tiredness is a factor especially in the courses after the early shift
After positive evaluation, the approach of the tailor-made in-house training related to the workplace, is now prevalently used	
A financial funding for employers to provide in-house language training for their employees is now planned by the Federal Office for Migration and Refugees (BAMF)	

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<sup>29</sup> The aim is to have the practice described as a role model to follow-up courses scheduled and arranged according to the practice.

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## **2.2 Norway, The Basic competence in working life Programme**

by Miriam Radtke- Deutsches Institut für Erwachsenenbildung Leibniz Zentrum für Lebenslanges Lernen; validated by Graciela Sbertoli, VOX

### *Problems faced*

An estimated number of 400.000 people in Norway are lacking basic skills, including literacy, numeracy, communication and ICT skills. The following Case Study describes the programme “Basic Competence in Working Life” which is implemented by Vox, the Norwegian Institute for Adult Learning in Oslo, acting as an Agency of the Norwegian Ministry for Education and Research. The general objective of programme is to improve the basic skills of workers on the labour market that might already suffer from a lack of skills or possibly face difficulties in the future when it comes to new demands at the workplace, or unemployment. Regarding the long term perspective, suitable basic skills training should reduce, prevent and finally exclude the lack of basic skills among the population.

For this purpose, campaigns were launched to raise awareness of this issue. The main task of Vox is to define and describe basic skills, as well as the activities and levels they entail. To determine the estimated final objective of the learning process, competence goals are defined and described by Vox. In the framework of the programme, training courses and tools are created. Spot tests of the training are evaluated by associates from Vox.

In the first year, 2006, the Ministry has provided over 14 Mio. NOK (= approx €118.500,00) for companies and institutions who apply for funding to implement the basic skills trainings. Between 2006 and 2009, a growing number of companies applied for funding and an increasing amount of NOK was allocated in the framework of the “Basic Competence in Working Life” programme. For the year 2010 it is planned to continue the programme which is finally supposed to include all lower skilled people in Norway and build or improve their basic competence.

The “Basic Competence in Working Life” programme is picked as a good practice as it shows how the Norwegian government became aware of the fact that - even though Norway is a quite “well-educated” country - a considerable number of people still suffer from a lack of basic skills. After



awareness was raised, a strategy was achieved to tackle the problem. This Case Study presents the effective implementation of a measure, initiated by the Norwegian Ministry of Education and Research and coordinated by Vox, the Norwegian Institute for Adult Learning.

The Case Study shows how a coherent strategy and continuous financial support can achieve remarkable results in basic education contexts.

### *Lessons learned and reasons that explain the relevance of the Good Practice*

Prior to 2006, Norway, along with other countries, participated in the OECD international study on literacy standards (International Adult Literacy Survey – IALS) and a further study on literacy and life skills in the adult population (Adult Literacy and Life Skill Survey – ALL). Although Norway's results are relatively good in comparison with other participating countries, it is apparent that a large section of the population appears to have quite a low level of basic education. Around 400,000 adults (16-65 year-olds) have not achieved adequate competence in literacy and numeracy, which are absolute requirements for active participation in working and social life.

In order to tackle this issue, the programme, *Basic Competence in Working Life*, was launched in 2006. Its primary aim was to set up basic education projects in enterprises and to monitor the implementation of the measures taken. Furthermore, the Norwegian Ministry for Labour and Social Affairs formed a consortium in order to reach the target group of job seekers in vocational preparation courses.

In this context, *Basic Competences* is a comprehensive term which covers a range of basic skills. The programme focuses on literacy, numeracy and computer application competences in the field of information and communication technology (ICT).

The Norwegian Institute for Adult Learning, Vox, has been entrusted with the coordination, support and on-going evaluation of the programme. Following the kick start from the government, networks and consortia were set up: enterprises were able to apply for public funding, and finance was made available for basic education courses in public institutions. Vox is now responsible for the design, quality assurance and promotion of the

courses offered which also includes promoting the further qualification of course trainers and managers.

Although substantial progress has been made following the debates on education, literacy standards remain a critical issue. Different studies (IALS, ALL) reveal that a large section of the European population has massive problems with the basic skills of reading and writing.

At a time and age that is defined by modern communication and information technologies, globalisation and individualisation, the ability to read and write and, to a greater extent, possess digital skills, are among the essential pre-requisites to participate adequately in social and working life. Phenomena such as work-related migration and migrant labour further intensify the problem by adding a lack of speaking and comprehension skills in the language of the country.

Even if this European problem is certainly not as evident in Norway as in other countries, it is obvious that, with an estimated 400,000 individuals in the high-risk group, taking the total population in Norway of about 4,800,000 into consideration, about 8.3% have inadequate competence in literacy; a situation which demands action on the part of the Norwegian government.

Furthermore, according to the figures collected:

- Every fifth person aged between 16 and 20 years in Norway belongs to the high-risk group.
- The chances of belonging to the high-risk group increase, according to statistics, even more in old age.
- Migrants, especially from non-western countries, have a lower level of basic education.

Hence, the Norwegian government took action and explored measures to improve the situation. Employers were included in the programme from the outset as an effective strategy to utilise companies' existing infrastructure for employee development to develop adapted training and further education courses. The Ministry for Education and Research concluded that attending standardised basic education courses oriented to the primary sector (meant as the level and subjects of primary school) would not bring about the desired results. Rather, the link to occupational or everyday matters must be clear and appropriate. Another reason worthy of mention is that learners with insufficient basic skills often have painful memories of school and the motivational factor will therefore be much

higher when learning takes place at work and is not connected with these unhappy experiences.

At this point the Norwegian Institute for Adult Learning, Vox, stepped in and eventually developed and implemented a programme for the whole initiative launched by the Ministry.

Lifelong learning and giving opportunities to adults to receive training are important principles in Norwegian education policy. The objective here is to have a better qualified adult population. Added value in today's and tomorrow's work places will increasingly depend on the knowledge, skills and creativity of the working population. More and more significance will be placed on continuing and further education, as well as on adult education. Apart from qualifications for working life, adult education should establish the basis for social and cultural commitment, as well as democratic involvement, during leisure time.

As the first country in the world to adopt legislation stipulating the right of adults to education in 1976 ([www.norwegen.no](http://www.norwegen.no)), it is obvious that the Norwegian government examines potential schemes for further education for adults and is prepared to grant the appropriate funding. A focus in the past was on improving educational opportunities for underachieving groups through adult education. This applied primarily to adults with an especially low level of school education, different categories of people with special needs, adults with dyslexia, and adult speakers of other languages. Norwegian education policy attaches great importance to lifelong learning and adult education. Everybody should have the opportunity to acquire new knowledge and broader skills to help fulfil their roles in society, and to be able to adapt to the rapidly changing demands of working life. Learning is understood as something which takes place at all stages of life, in many different ways and in many different fields.

Following consideration of measures to reduce the number of people with poor skills in reading, writing or arithmetic in Norway by means of a national and comprehensive programme, the Norwegian Institute for Adult Learning, Vox, was brought on board.

In line with its legal status, Vox acts as an agency of the Norwegian Ministry for Education and Research and is responsible for networking, advising and financing, evaluating and implementing projects in the field of both Norwegian and international adult education. As an experienced player, with an overview of the adult education landscape, Vox operates ultimately as a political advisory body for the Norwegian Ministry of Education and Research.

Thus, the implementation of the programme, *Basic Competences in Working Life*, is carried out under the sole responsibility of Vox.

Initially, it is essential to establish further contacts with companies and to develop existing ones. The approval of funds takes place following applications from the companies to Vox, which means that a campaign has to be initiated through Vox as a first step. Companies must be made aware of the programme and their opportunities to participate. This is achieved by Vox through a variety of promotion and information campaigns, such as newspaper articles and advertisements. At the same time, Vox develops appropriate programmes, curricula, instruments to record proficiency levels, and evaluation methods.

Both public institutions and private enterprises are eligible to apply to participate.

#### *Method used*

In order to create the pre-conditions for sound programme planning, Vox initially defined and subdivided a framework for participants' competence levels and targets relating to qualification courses in the fields of reading, writing, speaking, and information technology.

The Framework for Basic Skills for Adults established national standards for reading and writing, oral communication, mathematics, and ICT competences. The descriptions of levels of competence for each of the basic skills are divided into three levels. The template is identical for all skills and all levels. Each level is described in detail in the form of intended learning outcomes.

#### **Literacy**

- Level 1 comprises the most basic decoding and spelling skills needed to be able to read, understand and write words and simple texts in everyday life. The focus is on the reading process at this level.
- Level 2 describes the competences needed to be able to read and write coherently, fluently and relatively quickly. Some will still struggle with a somewhat weak understanding at this level.
- Level 3 comprises the skills needed to handle various types of texts at work and in society in general.

In addition to the three levels, there is an entry level which helps to secure language skills before the education starts.

**Numeracy**

In the Norwegian description, the concept "everyday maths" is used to emphasise the practical nature of this subject.

- Level 1 describes the minimum competence needed to understand basic concepts and symbols and perform simple mathematical tasks in practical and familiar contexts.
- At level 2, the adult responds actively to mathematical information and can follow children's schoolwork up to year 4.
- Level 3 describes a more independent attitude; the adult understands, uses and responds critically to more complex mathematical information in the form of numbers, symbols, graphs, figures etc. At this level, the adult can follow children's schoolwork up to year 7.

**ICT skills / digital competence**

ICT skills / digital competence is about using various ICT systems, finding and exchanging relevant information and producing and presenting information to others.

- Level 1 comprises the minimum competence needed to be able to utilise public and private services for personal needs.
- Level 2 describes the competence needed to use various web-based services independently and actively.
- Level 3 comprises the competence needed to be able to exploit the potential of new technology independently and actively.

**Oral communication**

The competence goals describe the oral skills and strategies that adults need to cope with communication in the various arenas of Norwegian society.

- Level 1 covers basic communication in familiar situations, such as taking messages and asking for clarification when something has not been understood.
- Level 2 describes the skills that are necessary to take an active part in communication dealing with familiar topics of personal and professional interest.
- Level 3 covers the skills necessary to communicate flexibly and efficiently in both familiar and unfamiliar situations.

### **The work process**

In the work on national standards in 2006, it was seen as crucial for success to create support and interest and finally to capitalise on the experience of other national experts in the field. Thus Vox put a lot of effort into maintaining extensive contact with a wide range of relevant institutions, including the social partners, ensuring that experts and stakeholders were kept informed, and/or present at meetings, and also that the public had access to the information about the work-in-progress.

In the course of defining and describing the competence levels, the *Competence Goals* were developed. Competences, abilities and skills are defined in the form of a set target, which describes exactly what and at what level activities might be possible. So for example, a person with *Literacy Skills* at Level 1 should be capable of reading and understanding a short text with simple and known vocabulary. At *Literacy* Level 3, the person should, on the other hand, be able to read and understand differentiated texts and extract key information from them.

Now appropriate curricula and courses are developed that are based on these theoretical frameworks.

The ongoing work was published on the Vox website, inviting questions and comments from anyone interested. This open process contributed to securing the quality of the work, and to creating a consensus and an understanding about the guiding principles that could pave the way for applying the framework in practice.

All the sets of competence goals, i.e. for literacy, numeracy, ICT skills and oral communication, have now been approved by the Ministry of Education and Research.

### *Solution adopted to the initial problem*

For the *Basic Competence in Working Life* programme, the vast majority of courses are initiated through collaboration between the companies and the educational providers. They adapt the course design to the needs of the company and base it on the *Competence Goals* of the Vox framework. Projects outside companies may also be set up, in these cases preparation for working life must be the focus.

Each company, whether public or private can apply for funding. Vox considers the following criteria as especially important:

- Learning activities should be contextualised to basic work-oriented competences supported by the training.

- The courses should strengthen the participants' motivation to learn from the very beginning.
- The course should refer to the *Competence Goals* determined by Vox.

In addition, Vox designed courses for basic education teachers and trainers jointly with the *Basic Competence in Working Life* programme. The courses deal with the same subjects which comprise the programme - reading, writing, arithmetic, communication, and information technologies. Here, potential trainers in basic education are trained and advised to enable them to create courses professionally. These courses leading to a qualification take place in Vox's premises. Additionally, a test and certification system has been specially developed by Vox, which qualifies and certifies the trainers – after the appropriate further training - to use a special diagnostic test system and measure learning outcomes.

Vox also offers interested trainers, learners and providers of basic education courses different internet programmes as resources which allow them to use and present a variety of tools in the fields of literacy competence, computer literacy, or arithmetic (see *Maths Aid*, *ABC pc*, *InterAct*).

## **2006**

In the first year, following the start-up of the programme, 167 enterprises applied for funding. Funding amounting to 14.5 million NOK (= approx €1.710,00) was awarded to the 64 which were selected. Given the number of applications received, which totalled more than 85 million NOK (=approx €10.000,00) in the first year of the programme, one may conclude that the offer of a work-related further qualification in basic education met with a generally positive response and there was a demand which could and needed to be met.

## **2007**

In 2007, 20 million NOK (=approx €2 millions and 370,000) was distributed to 69 out of the 208 companies that applied for funding totalling 78 million NOK (= approx €9 millions and 200,00). Four million (=approx €474,000) of the 20 million NOK funds were invested in special development projects implemented, monitored and supported by Vox. These funding data are available at [www.vox.no/templates/CommonPage.aspx?id=2641](http://www.vox.no/templates/CommonPage.aspx?id=2641).

## **2008**

In all, 78 enterprises from the private and public sectors were granted 25 million NOK in funding to implement basic education courses in the work place or within work preparatory frameworks. Prior to the deadline for applications, an information campaign was launched which found that the focus of the basic education projects should be placed on literacy competence, as in the previous years the majority of the approved projects focused on information and communication technology competences. A team of “motivation agents” contacted eligible applicants and explained the programme’s opportunities and advantages. In addition, information was forwarded specifically to companies in the service and retail sectors so that better use be made of the opportunities for further qualification for employees through support for literacy competences.

## **2009**

The total number of applicants in 2009 was 270. The applications received the sum of 122 million NOK (=approx €14,500,000,00), which was considerably higher than the amount approved. Following close examination and a review of the applicants by Vox, 106 projects comprising over 200 companies were finally approved and a sum of 34 million NOK (=approx €4,000,000,00) was granted. The companies have had to bear a greater part of the costs this time for the qualification schemes. The allocation and the amount of each grant is based on the duration of the course and the number of participants. Over half the funded projects deal mainly with improving literacy competences. Apart from literacy, many initiatives have focused on computer skills so now further education must include a combination of language, computer and mathematical skills.

In 2009, in addition to Vox’s centralised information and promotion activities, there will be additional advisory and guidance services offered to the applicants in each of 19 Norwegian administrative districts. This extra opportunity to gain information locally on the application process is regarded very positively by the companies. Hence, this model will also be maintained in the future. It should be noted too that, following the generally positive response, the *Competence in Working Life* programme will be continued in the coming year.



## *Transferability*

In their evaluation of the *Basic Competence in Working Life* programme, the external evaluators from the *Econ Pöyry* consulting firm confirm that up until now good results have been achieved (*Program for basiskompetanse I arbeidslivet. Evaluering*, 2008). Most of the participants extended their basic competences, improved their self-confidence, and increased their motivation to continue learning. The evaluation report, published in May 2008, records that the programme, which was created in 2006, had already funded a total of 230 projects, and over 3,000 adults had gained further qualifications through basic education courses.

The aim of the programme initially was to open up opportunities for the working population, both job seekers and employees, to expand their basic knowledge in reading, writing, arithmetic and information, and communication technology, and to enable them to cope with new challenges in the labour market, in working life and also in society. The learning process should take place as close to real working life as possible and the contents contextualised to the participants' work.

### **Evaluation of short-term impacts to date**

It is still too early to forecast and measure the potentially long-term effects of the programme, - for example, the achievement of a working population actively engaged in continuing education. For this reason, the evaluators limited themselves to the participants' short-term learning gains, e.g. the level of satisfaction with the courses, evidence of progress towards learning outcomes, or to what extent the programme may be leading to a direct expansion of the further education market with respect to basic education courses on offer. The evaluators concentrated on the courses funded in 2006, and the employment agency courses supported by the Ministry for Labour and Social Affairs which took place in 2006 and 2007. The core data are taken from three different sources:

- a) Contact with groups, composed of representatives of participating enterprises, further education institutions and course participants.
- b) Results of surveys conducted with both participants and further education institutions.
- c) Qualitative interviews carried out with the responsible project administrators from the Ministry and the project managers.

### **Motivation is indispensable**

Experience gained in the course of competence reform in Norway shows that employees with low levels of basic education, as well as their employers, have little motivation to engage in further education. The *Basic Competence in Working Life* programme is designed precisely to address this issue and develop a strategy to reach these target groups through tailor-made further education courses. The programme evaluation revealed that it is precisely these target groups who are reached, especially in the courses to improve literacy competences. The majority of participants attending these courses reported the negative learning experiences they had in the past. Participants in application of information and communication technology courses are more likely to form heterogeneous groups in which the majority of participants have their course fees paid by their employers.

The total number of course participants in 2006 was lower than expected and also less than the total sum stated in the project applications. The greatest challenge according to the employers was to motivate the participants to attend a course particularly in literacy. In some cases, motivation work was called for on the part of the course provider as well as the employer and the government in order to dispel employees' and potential participants' initial and enduring prejudices regarding further education. However, the evaluators acknowledge that the *Basic Competence in Working Life* programme has contributed to dispelling such prejudices and to creating a greater awareness of the issue of the lack of basic education.

By contrast, motivation is not a problem when it comes to participating in a computer course. In workplaces, the number of interested employees often exceeded the maximum number of places on the course.

Furthermore, it must be mentioned that all those involved, be it the employment agencies, the employers and participants were, all in all, satisfied with the organised courses. Course trainers almost always received very good feedback; after completing their courses around 70-80% of the participants evaluated their course trainer as having presented the learning targets "very well." Most of the participants felt that the learning contents were appropriate and adapted to their personal learning needs. The participants' satisfaction regarding further education courses in reading and writing is particularly high. 80% of the participants stated at the end of the course that the contents were exactly tailored to their needs. On the other hand, computer courses were evaluated as being more, rather than less, tailored to individual needs.

### *Weak and strong aspects*

#### **Measurable progress for most of the participants**

Vox checked the literacy competences of several participants who had been tested by the employment agency, at the beginning and at the end of the course. Most of the participants who had attended the course had made measurable gains in literacy competence. About 50% of the participants, both job seekers and those already in gainful employment, noticed that after completing the course their orthography had significantly improved. In the same way, around half of the participants admitted that after the course their knowledge of grammar as well as their personal reading rate had improved. The results from ICT courses vary; however, the majority of the employed participants reported that, in general, their competence in the internet and email communication had increased. The current projects now test the participants' learning outcomes with the recently adjusted and completed testing system from Vox. A more accurate and comprehensive measurement of learning outcomes can be expected in autumn 2010.

In addition, course participants and employers conclude that a positive consequence of the courses is being able to overcome barriers and, thus, face future challenges more confidently as being further qualified also increases self-confidence. On completion of the course, the participants showed their willingness to face and tackle new tasks although this implied their participation in further education programmes in the future.

The companies which participated in the programme and which were funded during the time of evaluation are comparatively large and represent only a limited sector of the labour market. It is obvious that the advantage of supporting larger companies is quite a cost efficient way of simultaneously reaching as many employees as possible. On the other hand, the demand for educating staff in SMEs (Small and Medium-sized Enterprises) is equally high. Here the lack of time and money poses a big challenge. Several sectors in which the education level of workers is typically quite low are underrepresented in the programme.

Here, in the assessment of the evaluators, is one of the programme's greatest challenges, which will have to be addressed in future. More branches and sectors of industry, and consequently more workers, have to be reached through the programme in order that they too have the chance of benefiting from further education.

<b>Strong aspects</b>	<b>Weak aspects</b>
The interest in basic competence Computer Courses is high	Compared to the other basic skills literacy, numeracy, communication, the interest in computer training is over-represented
Many large companies participate in the programme	Small and medium sized enterprises are underrepresented due to lacking time and money
Measurable competence development of course participants after the training	
Increasing amount of money is invested in the programme from year to year	
Over 3,000 adults gained competences through the basic competence in working life programme since the starting year 2006	Too early a stage yet to make dependable forecasts about the sustainable impact for the long term perspective
High motivation among employers and workers to participate in computer courses	Bad learning experiences in the past partly demotivate workers from taking part in basic skills courses for numeracy and literacy
Due to the great acceptance of the programme the continuation for next year (2010) is assured	

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### **3. GUIDANCE, COUNSELLING AND VALIDATION OF INFORMAL AND NON FORMAL LEARNING**

#### **3.1 Finland, Manu project/Vocational Training, competence-based qualifications for immigrants**

by German Institute for Adult Education Leibniz Centre for Lifelong Learning

##### *Problems faced*

The instant Case Study is concerned with the implementation of support models for immigrants in Finland that suffer from language barriers which retard the proof of their vocational skills and competences. The major number of immigrants in Finland comprises “Ingrians” or the so called Russian Finns, being of Finnish origin. Nevertheless, a lack of language skills and cultural barriers create difficulties for these immigrants on the Finnish labour market.

The MANU project concretely addresses these barriers through the development of models that are supposed to support migrants with language difficulties and make their available qualifications visible. They would otherwise possibly experience failure because of weak language skills. The support models of the MANU project are strictly linked with defined occupational fields and offer employees and applicants in these selected occupational fields the opportunity to validate their competences.

The aim is to finally reduce the immigrant unemployment rate in Finland, to improve their employability, but also to foster acceptance and promotion of diversity at workplaces. For the latter, a further network has resulted from the MANU project. The European “Network of Divers-Cities” developed to advance transnational communication and consultation on the integration and competence validation of migrants in European cities.

This example of good practice is selected due to the successful exemplification how national projects relating to qualification and inclusion measures can open out into a transnational network that enables different members to present, discuss and benefit from their ideas.

In the MANU project innovation is related to the concept of the 'support models' including a 'cultural mediator' to facilitate vocational training and job application for ethnic minorities on the labour market. How to make use of these project outcomes is concretely described with the help of reporting the work of the Network of Divers-Cities.

Funded by the European initiative EQUAL, the MANU project and the Network of Divers-Cities are strictly linked to the general European goal to prevent and combat the discrimination of employees and job applicants on the European labour market

### *Lessons learned and reasons that explain the relevance of the Good Practice*

Ethnic minorities are represented in many European countries. The term "ethnic minority" implies that this can mean migrants as well as inhabitants of the country with a different ethnic origin to that of the majority. In many countries and their urban metropolitan areas in which there is a strong settlement of ethnic minorities, this foreign background can bring with it exclusion, and also discrimination of the minority in question by the majority population.

In Finland, the share of ethnic minorities that have immigrated to the country as migrants is relatively small. The 1.9% share of foreigners is not high in comparison to other EU member states. Rather, it is the rapid and continuous rise of the percentage of foreigners since the 1990s (1990: 0.5%) that has led to numerous reforms in migration and integration policy. A distinctive feature of Finnish migration history and policy is the right to immigration on the basis of "Finnish origin". Up to 1990, only former Finnish emigrants or their offspring came to Finland from the Nordic countries, the USA or Canada via this route. The right was an element of the policy for the promotion of return migration. In 1990, the then Finnish president, Mauno Koivisto (Social Democrats), named Ingrians as "ethnic Finns". Citizens from the former Soviet Union, whose ancestors emigrated to regions in what is now Russia in the 17th and 18th centuries, or during the 1st and 2nd World Wars, are known as Ingrians or "Russian Finns".

Both ethnic minority groups in Finland, the migrants as well as the immigrants of Finnish origin, who were mainly settled in Russia or Estonia previously, have to overcome culture and/or language barriers back in Finland which has effects on the employment market in particular. Just as in other countries of immigration, it is now incumbent on Finnish policy to

react to these problems and the difficulties arising from them with appropriate measures.

In the following paper, the MANU (Vocational training and competence-based qualifications for immigrants) project will be introduced as one of the many methods developed for further qualification and competence assessment of Finnish citizens with a migration background. Furthermore, the international development partnership which came about as a consequence, Network of Divers-Cities, and its work will be described. The development partnership brings together the various results and products of national projects through cooperation, and an exchange is created through which, ultimately, the individual project results and products developed are to be optimized even further.

The acceptance of the Ingrians as ethnic Finns began an immigration movement in 1990 through which over 20,000 people resettled in Finland within only a few years. Since that year, the immigration of Russian and Estonian citizens of Finnish origin has risen continuously. In the year 2000, for example, 22,000 were on the waiting list for a residence permit. These circumstances, as well as the Ingrians' conspicuous integration and language difficulties, especially as regards the younger generation, have led to restrictions on this ethnically privileged immigration. Since 1996, return immigrants from Eastern Europe have to take part in orientation and language courses in the region of their origin. In addition, they have to name a target municipality in Finland and obtain information on housing possibilities there, before they receive the residence permit.

Already in the 1990s, there were integration programmes for foreigners with the focus on language courses in individual municipalities, such as, for example, in Helsinki. In the commission report of the Immigration and Refugee Policy Programme, the precarious situation on the employment market for the foreign population and their language difficulties were pointed out. Since 1999, there has already been a national law on integration which was to promote the integration of migrants in the Finnish employment market and in Finnish society while maintaining their own language and culture. The law lays down that asylum applicants and all foreigners who receive unemployment benefit or social help, are obliged to participate in integration measures such as language courses, retraining, vocational training or courses on Finnish society and culture. A special focus of the law is on educational policy measures for foreign children and young people. During this time, and only if the migrants participate in the courses agreed, they receive financial support.

Finland's still very young immigrant history shows that, despite the comparably low percentage of foreigners, the policy has been to quickly attempt to legally control and limit the trend of immigration. These migration policy decisions will not however stop immigration to Finland, but rather accompany Finland on the road to becoming a country of immigration. In the forecasts, it is assumed that there will be a net immigration of about 3,000 per year up to the year 2010.

Finland, however, basically shows an unequivocal recognition of its de facto immigration situation and is taking on the associated task of integrating migrants in the society, culture and employment market. The integration law, which aims to promote integration – not assimilation – together with recognition of cultural and linguistic otherness, shapes the life situation of migrants in Finland.

On average, the unemployment rate of migrants in Finland is higher compared to Finnish citizens without a migration background. This can be traced back to different cultural backgrounds, on the one hand, and also to language barriers, on the other hand. These hamper migrants in offering proof of their job skills in application situations, among others.

With this problem in the background, the consideration is now, not only to look at the existing deficits of the migrants and to develop concepts with which these can be counteracted, but rather, to advocate assistance for a means by which skills can be better recognized and made apparent in these cases. It is not only migrants that are the target persons in this approach, but also employers and vocational trainers. This approach basically presumes the established philosophy that all members of a society contribute to a functioning cooperation and, for the integration of members with a migration background, the diversity of individual groups within a society must be a factor that can be looked on as enriching rather than disturbing. Starting out from this diversity, which is ultimately manifested in language among other things, models can be developed on the basis of which the respective groups can also succeed in making vocational competences and skills comprehensible to each other.

It is under this premise that the MANU project, through which, in particular, the employability of migrants was to be improved, was finally conceived, under the coordination of Aike International Oy in Helsinki. The idea here is to develop so-called "support models" through which migrants can demonstrate their vocational qualifications – in spite of language barriers. With the help of this module (support models), the heretofore large discrepancy between test results in application situations and effectively existent vocational qualifications of migrants with second



language difficulties should be reduced. For this, it is vital to improve migrants' opportunities to demonstrate their skills, as well as to make the diagnosis of competences and vocational qualifications easier on the employer's side. Besides, the motivation of the unemployed with a migration background to take part in further education measures should be increased through the MANU project. Overall, it is moreover envisioned to make working and learning environments more compatible with diversity and to open up horizons through the project and its products for employers and potential employees with a migration background.

#### *Method used*

The "support models" that are being developed in the course of the MANU project are the result of several different activities and working steps that have been implemented into the project previously. These relate to the individual steps for developing migrants' vocational skills and making them visible, which are essentially designed as follows:

- 1) Orientation phase before the actual training or assessment of vocational skills. In the project, modules for three occupational categories have been developed: industrial cleaner, bus driver and secretary/professional administrator.
- 2) The evolution of typical situations, development of a practicable evaluation system for the presentation of proficiencies and existing skills.
- 3) Design and trial of "easy-to-read" material with crucial instructions for the migrant target group.
- 4) Counselling through a cultural mediator for learners, teachers and other representatives of the world of employment.
- 5) Supporting diversity at the workplace:
  - Trial training on diversity management for further education instructors;
  - Instruction and consultation of representatives of the working world in relation to "on-the-job training" at the workplace and recognition of the skills of migrants.

The declared target groups of the project activities and products are:

- The unemployed in Finland, employed migrants in Finland, Finnish students at integration courses or other people that want to demonstrate their vocational qualification through competence assessment.

- Teachers in vocational education or vocational further education that want to extend their competences with regard to teaching and professional skills through diversity management skills in order to better meet the requirements of the heterogeneous learning/teaching environment.
- Cultural mediators, employers and human resources representatives who carry out competence and performance appraisals.

In the course of the MANU project and the individual product developments and activities, a particular focus is being placed on the continuous evaluation and analysis of the project results. The activities are analyzed in various ways:

- Feedback from the training sessions (questionnaire).
- Feedback from the teachers (questionnaire).
- Feedback from the cultural mediators (interview).
- Feedback from the work environment (questionnaire).
- Evaluation meetings within the project management group (analysis schemata, diagnosis of success criteria).

The success criteria that have been diagnosed are used as the major base components for the project products that are made up of various handbooks that can be used on their own or, equally, as a complete series. The handbooks are subdivided into the following focal themes among others:

1) Easy-to-read material

- Description of the design and composition of the materials.
- Instructions on the use of the materials.
- Preview and examples from the handbook series.
- Presentation of teaching support methods.

2) Development of competence-based vocational qualifications

- Models and solution approaches for verifications of competence and for situations in job preparation courses.
- Description of the cooperation between training institutions, job centres and companies.
- Challenges before a placement application for vocational further education: instruments for identifying and presenting individual competences.

3) Consultation of/through a cultural mediator

- Description of the functions and profile of the cultural mediator.

- The role of the cultural mediator in the guidance of migrants in the task of individual competence diagnosis.
- Examples from life: typical problems, questions and solutions.

#### 4) Promotion of diversity in the workplace

- A new challenge in teaching and learning.
- Further education institutions: opportunities, capacities, resources.
- Experiences of instructors as well as students and verified solution approaches.

The project's products are to be sustainable and strengthen awareness in society and on the employment market for the diversity of the potential available while paying attention to a number of perspectives. With the orientation on different target groups, this awareness should grow at all levels. Finally, however, this approach should ensure a durable increase in the employability of migrants.

#### *Solution adopted to the initial problem*

In the context of the collective initiative, EQUAL, the MANU project and its results will be evaluated again from the aspect of comparative research and practice in an international development partnership consisting of German, Finnish, French, Italian and Slovakian partner organisations. Following the signing of a transnational cooperation contract, the network consortium has dealt with the challenge of new discussion on the target group of migrants, and their integration and further education at a European level. With this aspect in view, the results of individual projects from the partner countries relating to this topic are examined carefully, presented and compared. In this way, as a consequence, the opportunity should arise, to learn from each other at this European level, and to identify inspirations and improvement possibilities for the projects and measures in one's own country, from the partners. Through the presentation and comparison of the respective projects from partner countries, a completely new project called the Network of Divers-Cities has come about.<sup>30</sup> The Network was launched

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<sup>30</sup> Basic data and information about the network are available at <https://webgate.ec.europa.eu/equal/jsp/tcaView.jsp?id=4017&ffTCAMajorVersion=2&ffTCAMinorVersion=0> (EQUAL database)

in June 2005. The "Cities" are to be found again in the name as all the national projects in question have been implemented in cities or metropolitan areas.

The shared interest in this development partnership is to improve the situation on the employment market in the individual countries in question and the social integration of ethnic minorities and migrants. Three goals have been formulated by the partners in this respect:

- 1) To change the general attitude, to reduce prejudices and to change the approaches and methods of the main players on the employment market in a constructive manner.
- 2) To strengthen individual empowerment of migrants and ethnic minorities on the employment market.
- 3) To create a general awareness for the "socially integrating employment market".

These goals are being realized with the inclusion, application and adoption of concepts of the individual national projects.

To this effect, a total of seven transnational seminars took place in the two-year span from 2005-2007 in Marseille, Rome, Mainz, Lucenec and Lappeenranta in the partner organisations. Besides, various workshops, bilateral exchanges and study trips of the individual project partners take place in the context of the project, in order to go into specific issues and areas of the national projects more in depth.

Finally, a catalogue of new results and products has come into existence through these fusions, which build on the individual projects and present an optimized valid version for Europe. The shared products<sup>31</sup> of the cooperation comprised:

- 1) Resources for communication.
- 2) Aids for competence assessment and appraisal.
- 3) A handbook of teaching methods for cultural mediators.
- 4) Motivation methods for the target group (motivation work manual).
- 5) A handbook for national local networks concerned with the general improvement of the integration of ethnic minorities and migrants.

Through this new formation and the different experiences and influences of the partners in the Network project, the MANU project too has been

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<sup>31</sup> The tools are in use by the organisations who developed them and the members of the network. Materials where tools are described are available on the web. Tools can be requested to the responsible organisations.

looked at again in a new light, and the aspects that have been particularly successful could be highlighted again and inspire other European partners in this development partnership.

### *Transferability*

That the MANU project is evaluated as successful as one of measures represented in the Network through the partners of Aike International Oy is, of course, already confirmed through the fact that it has been mentioned as an example of good practice in Finland in the context of the development partnership. Apart from this, it is, however, to be noted that with the implementation of the "support models" at a national level in Finland, there are already positive effects to report, such as, for instance, that after the test phase of the "support models", numerous users were motivated to participate in further education and/or found employment. In the end, the project led to the establishment of an European 'network of divers-cities' - half of the study is about that – due to its being a follow up project funded within the framework of EQUAL

In the development partnership, Network of Divers-Cities, the activities and results are also evaluated on a regular basis. However, for practical reasons among others, such as, for example, to save on travel costs, crucial evaluation processes take place within the cooperation of the development partnership, directly after the individual seminars. This enables the still fresh impressions to be directly worked through, among other things, and direct conclusions to be made and perspectives to be formulated. In this way, the cooperation and procedure as regards content and method from seminar to seminar supposed to be optimized within the duration of the project. The Network is still partly active and members of it are still effectively networking.

### *Weak and strong aspects*

In the context of the transferability, the following questions are placed in the central focus of the evaluation:

- 1) What action have we taken?
- 2) Have we examined the correct issues?
- 3) Have we examined the issues with the correct methods?

All the findings related to these questions are recorded in the evaluation report.<sup>32</sup> Apart from this, there are further individual evaluation reports for each of the six seminars that have taken place.

Overall, it can be noted that through exchange and discussion between the different national organisations, or their representatives, mutual understanding has grown, in and through the network. The partners announce that the integration problem could be illuminated for each one in a new light which also achieves new effects for the national projects. These will now be looked at more carefully, together with their products, in relation to the newly-won inspiration at the European level, and the individual products will be adapted as far as possible. This means that for the MANU project too, some aspects may be looked at in another light and the methods and approaches which are strongly anchored nationally may prove to be non-transferable because strictly connected to the Finnish "Ingrians" population, as explained above. Nevertheless, it should be stressed that the idea developed in the MANU project and the conceptual design of the "support models" for supporting ethnic minorities and migrants in vocational educational processes, appraisals and application situations was well-received by the international partners and it is planned to be built into their own national strategies in future. The concept and principal of the cultural mediator also found large resonance in the transnational development partnership and will therefore also be followed further at the European level.

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<sup>32</sup> *Final Report 'Transnational Cooperation Network of Divers-Cities'* (2007), Unpublished. The evaluation report can be required as it is not actually accessible on the web.

<b>Strong aspects</b>	<b>Weak aspects</b>
The MANU project 'support models' are tailor-made for ethnic minorities and their specific situation in Finland.	For better transferability relating to other countries, the support models will have to be adjusted.
The European network of Diversity-Cities was developed from MANU and promotes diversity at workplaces transnationally	Some results and tools of the different projects are not completely transferable for every country in the network
Awareness for the diversities on the labour markets in the different countries is raised	
Exchange of ideas via the international network fosters the promotion of good practices in Europe	
Sustainable concept of the 'cultural mediator' meets approval in the network	

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### **3.2 France, Defense Preparation Day-JAPD. Systematic Identification and monitoring of Young Adults with Literacy Difficulties. An example of cooperation between State Administration and Civil Society**

by Jean-Pierre Jeantheau

#### *Problems faced*

Since the 1980s French stakeholders have known that a significant part (9% in 2005) of French adult population has serious reading difficulties. Following several studies carried out by national institutes, the Ministry of Education and international organisations it is evident that many young adults are leaving the educational system without a good mastery of basic competences, especially reading. The problem addressed by Defence Preparation Day (JAPD) is concerned with identifying a whole cohort the youngsters (still at school or already out of Educational system) who need to improve their literacy level and to offer them adapted solutions inside or outside the educational system.

#### *Lessons learned and reasons that explains the relevance of the Good Practice*

The JAPD programme was created to replace the former military draft system and was not initially an instrument intended to address literacy needs in France. But as time went by it became an essential part of the campaign by producing useful statistics every year to inform national, regional or local debates about and policies concerned with raising standards of literacy and to support organisations which work to reduce the number of young adults with literacy needs in France. The good practice is the way it unites a great number of stakeholders from very different organisations and makes them work together for a more coordinated action, targeting young adults facing literacy difficulties.

This large scale national initiative aims to identify young adults with literacy needs and to try to convince them to start a learning programme again before multiple failures force them to recognise the need to improve their literacy skills for themselves. Even if the number of young adults returning to learning programmes is not very high, the proportion increases



each year because of the better organisation of the JAPD and the post JAPD action conducted by Ministry of Education, missions locales and NGOs.

Every year this day provides a valuable opportunity to test the literacy skills of an entire age group (17-25, but mostly 17-19) regardless of academic background or gender. This process enables the identification of people with literacy problems who are then advised to join literacy courses. The tests are organised by the Ministry of Defence in collaboration with the Ministry of Education. In 2008 nearly 800,000 young people took tests to assess their mastery of written French, from which 95,626 (85,329 in metropolitan France, 10,229 overseas) were identified as having difficulties, including around 35,000 presenting major difficulties. Those figures have been very useful for promoting literacy policies at national, regional or local level. They are used as essential support for the implementation and monitoring of regional plans for tackling illiteracy. At the national level the figures provided for each region or district allow national stake holders to better target the areas where special effort has to be made.

#### *Method used*

The JAPD method consists in of meeting all young adults in a yearly cohort, giving them literacy assessment tests to identify those who face literacy difficulties and offering them the opportunity to increase their basic competences. On this last point, a range of diverse methods are used depending on the young adult's situation (in terms of school, work and family, including the individual's perceptions of school, motivation, the environment and the possibilities available). The methods could be individual help inside classroom, special help provided to small groups by teachers in schools, attending adult vocational training, tutoring, etc.

#### *Solution adopted to the initial problem*

In the past, the military was able to address the identified needs of young draftees during their military service and provide them with literacy (or numeracy) courses. With the end of conscription this option disappeared.

Now, French law requires young French men and (from 2000) women aged around 17 years old, who have met the requirements of a census at the age of 16, to attend a military information and registration day called the "Defence Preparation Day" (*Journée d'Appel de Préparation à la*

*Défense/JAPD*). This system, implemented in October 1998, covers all the metropolitan counties as well as the overseas territories. A JAPD participation certificate is required to apply for any state diploma, including a driving licence.

The JAPD programme comprises, within 8 hours, a range of activities including testing and individual interviews for those identified as having literacy difficulties. The literacy tests are developed by the Ministry of Education. The tests are automated and focus on identification of dyslexia, vocabulary knowledge, comprehension of an everyday document.

The JAPD offers young people identified as having literacy difficulties the opportunity to meet with an adult and talk about their future, receive information and careers guidance and to begin a support process (if that is their wish) led either by the national education system or by other bodies depending on whether or not the individual has finished schooling. The follow-up JAPD programme is delivered by partner and collaborating organisations (public, private and voluntary sectors) and involves counselling the young people and offering them the opportunity to attend courses appropriate to their needs. Joint commissions regulate the action of the diverse stakeholders.

### *Transferability*

JAPD is a national initiative and its creation may be viewed as the coming together of political will and an historic opportunity in a very positive political context. The cooperation between state administration and civil society is a key element of the JAPD. To bring it to fruition, a national network was set up. The aim was to gather and encourage cooperation among all stakeholders operating in the field who agree to join the project. The network is regulated by a range of conventions that include other network partners (which are relevant to the context of the action and conventions).

This practice is highly transferable if there is a strong will at the national level, although clearly such a large initiative is quite hard to manage. All participants are able to take advantage of such day. At first, all of the young people, including those facing literacy difficulties, attend first aid courses and are informed about a range of subjects such as the national history of professional opportunities offered by army. This day offers the opportunity to check the health condition or the literacy level of a whole young adult generation. The army has the opportunity to remind young adults of citizens' duties and to promote military careers.

This practice is not expensive (for the individual) or from a national viewpoint, taking into account all the information and opportunities offered.

#### *Weak and strong aspects*

One of the weak aspects worth mentioning is that the process between state and civil society is too bureaucratic. For example many young people who attend the interview have never gone to counselling and very few joined a training programme. This may be because of a lack of motivation among the young people meeting the army representatives (even if they are specially trained for this kind of interview), the waiting periods between the interview and receiving the letter, between the interview and the contacts with civil society, between first contact with them and skills assessment undertaken by a professional trainer. Another issue could be that results from the JAPD tests very often do not match the teachers' diagnoses. Many of the students identified during JAPD as having literacy problems had not exhibited the same difficulties in their school work. The JAPD stakeholder committee is trying to address these difficulties. For example, in 2009 in one region trainers from civil training organisations participated in the final interview and set an appointment with the young adult for less formal second interview on the following day in a public place. Although the results were very good, generalisation from this practice is very difficult at this stage as extension of such practice will only take place in 2010.. Following a comparative study carried out in 2009, a new commission for the tests has been established with a remit to study the reliability of the external test.

A strong aspect worth highlighting is the national network that has succeeded in gathering a great number of stakeholders from various areas and making them work together to reach thousands of young adults with literacy difficulties every year. The JAPD tests and the post JAPD activities are not perfect but, by the growing cooperation between the key players, the efficiency of each partner increases, making the overall effort more productive. The thousands of young adults who find again the way to training and are allowed to increase their knowledge is also a strong success for this practice.

## *Description of the case study*

### *Background*

#### *Social context*

French society has tacitly accepted for a long time a more or less considerable “residual” percentage of people facing difficulties to read or write. A lot of these individuals hid their situation to the extent of not registering for courses which could have reduced their numbers but at the same time would have certainly revealed their difficulties. Because people in this situation attended school programmes which were intended to ensure that they acquired basic writing skills it has been difficult to identify them from official figures. In the 1970s the illiteracy problem became more apparent to the authorities with the increase in unemployment accompanied by substantial economic restructuring whereby the occupations which had been a source of employment for people with writing difficulties began to disappear. During this period unemployed people were offered training schemes for which proficiency in writing was taken for granted. Those who had not acquired basic literacy therefore became excluded and most of them found their situations becoming more complicated. Their periods of unemployment increased compared to the average person and economic difficulties became more common. Agencies working with disadvantaged people began to notice an increase in visible cases of literacy difficulties.

#### *Political context*

The campaign against illiteracy has often been presented as a presidential and government priority. Again, it was to the President of the Republic that “ATD Quart Monde” presented their report in 1980. Up until 2007 the President re-confirmed this priority on several occasions.<sup>33</sup> In 2009 the President’s wife created a foundation (“Fondation Carla Bruni-Sarkozi”) which planned to act in 4 domains including the campaign against illiteracy. Functional literacy appears to have been a preoccupation of all successive governments since the 1984 report, even if elected representatives have not always supported its cause. The aim of the creation

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<sup>33</sup> 22 January 1997, 12 December 1996, 2 July 2002, 14 July 2003, 14 November 2005. Communications from the ministerial committee on illiteracy were not rare either: 28 August 1996 and 4 March 1998, the social affairs minister got involved. 19 June 2002 the national education minister and more recently the minister of social conditions on 12 October 2005.

of the GPLI (in 1984) and then the ANLCI (in 2000), is to translate words into action.

Greatest government concern surfaced at the very end of the 1990s. At the time we witnessed the combination of Jacques Chirac (from the right) as Head of State who was personally committed to the idea of addressing literacy problems and a government of the left led by Lionel Jospin, an ex teacher whose social affairs minister, Martine Aubry, was from Nord-Pas-de-Calais, the region in France most affected by the poor literacy phenomenon. This convergence explained the large number of important decisions taken over the space of a few years.

The French government weighed up the need to react on all fronts to prevent and deal with literacy issues through the organisation of a national, transversal, coherent and shared policy and by declaring (in a 1998 law) the campaign against literacy problems a national priority. The law gave it new impetus and divided up the responsibilities very widely. Article 149 states: "This priority is taken into account by the public education system, as well as by public and private persons carrying out a training or social welfare mission. All public service departments contribute in a coordinated manner to the campaign against illiteracy in their respective fields of action".

#### *Defence context*

The Army was first to respond in 1998 by giving reading tests to conscripts with the '*Journée d'appel de préparation à la défense*' (JAPD) which enabled the assessment of reading competence to be applied to a whole age group (young people between 17 and 19 years old) with no educational distinction.

The French Army has a long tradition of initial and functional literacy courses for soldiers since the end of the 18<sup>th</sup> century and the creation of the National Army (originally the Republican Army). Before the 1990s, during the period of military conscription, literacy and numeracy courses (mainly delivered by other conscripts with a teaching qualification) were provided to conscripts who had difficulties in literacy or numeracy.

The end of conscription, brought about by the 1997 law, raised a number of concerns including the end of educational support for young male adults. The JAPD is a way to address those concerns, and from the beginning the testing of conscripts was a part of the project. Taking into consideration practical problems the project of testing a large range of knowledge was reduced to reading literacy only. The underlying principle of the tests was to focus on identifying attendees with low literacy levels.

### *About the target population*

The JAPD target population is mainly young adults between 17 to 19 (up to 25). Nevertheless, with the tests the JAPD also wants to target the population of young people who have a very low level of literacy and are still at school or early leavers with a low level of literacy. One of the main goals of the JAPD is to identify those young adults and to try to convince them to start a learning programme again, before they realise the need to increase their literacy skills, after multiple failures, for themselves.

### *Description of the solution*

To identify young adults facing literacy difficulties tests have been developed focussing on dyslexia research, vocabulary mastery, comprehension of an everyday life document (movie theatre programme) and short continuous texts (one page extracted from a book). Since 2003, tests have been set under the responsibility of the Ministry of Education. The Ministry of Defence is in charge of the testing process in the field.

To monitor the post JAPD aspects (how to take care of young adults identified as facing literacy problems) a national network has been set up taking into consideration the first statements and experimentation (developed below). The Ministry of Defence, which has no possibility to solve the problem alone (unlike the previous situation when the Ministry was forced to do so), decided to tackle the situation by organizing links between JAPD tests and post JAPD actions with a panel of actors working to fight against illiteracy and focusing on young adults. Following contacts, an agreement was signed between: Ministry of Defence (DSN), Ministry of Education (DGESCO and DEP), National Council of “Missions Locales” and GPLI (*Groupe Permanent de Lutte Contre l’Illettrisme*, Permanent Group for Fighting “Illettrisme”, it was before ANLCI). Since then other national and local stakeholders have joined the network.

### *Methodology*

#### *Description of JAPD*

##### *French Registration process (citizen path)*

The JAPD is the last step on the path to French citizenship (*parcours citoyen*) including the census at 16 in every city hall, and then the JAPD.

Registration is compulsory. Following the registration process personal data of the youngsters are sent to the military administration, Military Service Directorate (DSN). The national and regional directorates plan JAPD sessions and send each registered youngster a written notification to attend the JAPD. Because of this process JAPD attendees are between 17 and 19.

#### *JAPD Programme*

JAPD programme includes collection of personal data about educational achievements, modules presenting citizen responsibilities and defence issues; Literacy tests, first aid training session; individual interview for those identified as having literacy difficulties. At the end of the JAPD an attendance certificate is given to each attendee whatever their test results. This certificate is compulsory for getting a driving licence, participating in public examinations.

The setting up of the JAPD action may be viewed as the coming together of political will and an historic opportunity in a very positive political context. Thanks to this context JAPD activity can affect a whole generation at minimum cost. In fact, specific costs are very difficult to assess because the JAPD is not specifically designed for the identification of young adults with literacy difficulties. The JAPD would be organised whether or not there were any tests. In 2009, the cost we have been able to identify are half an hour of work time (civil servant or non-commissioned officer) for 40 attendees in the testing phase, and 20 minutes for each young person identified as having literacy difficulties. The cost of the materials (screens, computers,) and the time for data processing (done by Ministry of Education) has to be added. Today, the amount of those costs is not available. Nevertheless, in the French National Budget, voted in the parliament, the average cost per draftee is published.

*Table 1 – Average cost per draftee*

	2006	2007	2008	2009	2011
Average cost per draftee	190€	182€	195€	<200€	<190€

*Source: Government (LOLF law) and DSN (Ministry of Defence)*

This cost includes mails, draftees' transportation costs, accommodation, salaries of Defence civil servants, extra bonus, and all costs paid directly for the organisation of the JAPD (including testing).

### *Statistical aspect of JAPD; Issues*

#### *Test process*

The attendees go through the tests in groups of around 40, each group in a room equipped with necessary equipment (screen, video-projector, computer, etc.) The testing process, nowadays, is automated. The JAPD staffs just give a presentation on the testing process and invigilate during the session. Test results are available immediately at the end of the session. The tests focus on identification of dyslexia, vocabulary knowledge, comprehension of an everyday document (a cinema programme) and short continuous texts (one page extracted from a book).

#### *JAPD test evolution*

The JAPD started in 1998 with boys and was extended to include girls in 2000. Literacy test design was undertaken by University of Paris V (Alain Bentolila) for lower level of literacy and Ministry of Education (Jean-Pierre Jeantheau) for the screening test and higher literacy level test. The test was divided in two parts: one common test for all attendees (screening test) in the morning, and two specialized tests in the afternoon; one for the candidates identified as probably having literacy difficulties and one for others. After the correction of the tests young adults identified as having literacy problems are sent for an interview to discuss their future and to learn about the support available to help them improve their literacy level.

In 2003, the literacy test organisation changed. Because of a general reorganisation of the JAPD, the time allocated to tests had to be reduced by half. A new single test (design by Jean-Emile Gombert from Rennes II University) was produced. The principle of the final interview determined by the test score was preserved. A controversy arose in Ministry of Education with regard to this test because many teachers did not agree with the findings from the tests. The introduction of a new test (quite different from the initial ones) interrupted the statistical data series preventing comparison throughout time, and raised a new concern for stakeholders.

In January 2009, the test was automated by the introduction of new technology including a video film presenting the test and asking the questions and a computer collecting answers given by attendees through individual remote controls. Scores are instantly calculated by computer, and attendees' literacy profiles are available immediately. The principle of the final interview is now only for young adults with literacy difficulties who have left school.



### *Interpretation of the tests*

In the JAPD, from the outset, profiles have been established according to draftees' scores. Since 2003, attendees have been categorised in 5 literacy profiles based on their scores in each different exercise. One profile groups together the draftees who succeed in all exercises. Profiles 1 and 2 group together draftees with the most serious difficulties, 3 and 4 group together draftees having some difficulties.

The Ministry of Education publications give the JAPD results for the 5 profiles. The ANLCI publishes the sum of profiles 1 and 2 as *illettrisme* indicator figures. However, others continue to consider young adults belonging to profiles 1 to 4 as *illettrés*.

### *Post JAPD Issues*

#### *First statements*

The JAPD offers the young people identified as having literacy difficulties the opportunity to meet with an adult and talk about their future, receive information and careers guidance and to begin a support process (according to their wishes) led either by the national education system or by other bodies depending on whether or not the individual had finished schooling. But, the initial process does not plan to give any concrete support to youngsters identified as having literacy difficulties, it just tells them that they need to take literacy courses and gives them addresses (*Missions locales*) where they can meet a specialist who can advise them to enrol on an adapted training programme. A letter is also sent to identified draftees (only to those who gave their approval for this) giving them the same advice and addresses.

Evaluation of this process revealed very quickly that a lot of young adults who attended the interview have never consulted the *Missions locales* and that only a small number actually joined a training programme. The main reasons found out were: a lack of motivation among youngsters meeting the army representative (not specially trained for this kind of interview), the waiting period between the interview and receiving the letter, between the interview and the contacts with *Mission locales*, between first contact with *Mission locales* and skills assessment undertaken by a professional trainer. The causes could be summarised as an over bureaucratic process between JAPD and *Mission locales*. These results led DSN to improve the process for referring young people with literacy needs to their schools and to local organisations responsible for helping young adults under 25 to integrate (like *Missions locales*). For example, the average waiting time between the

interviews and receiving the official letter ranges from a few days to a month.

#### *Monitoring Post JAPD aspects*

As mentioned, the methodology used to face post JAPD challenges was to develop cooperation between State Administration and Civil Society. To make it concrete, a national network was set up. The aim was to gather and promote cooperation among all stakeholders acting in the field and agreeing on joining the project. The network is regulated by a range of conventions including other partners of the network (that are relevant in the convention and action context). In 2009, besides the Ministry of Defence (DSN), the main post JAPD partners are the Ministry of Education (regional administration and schools), the national network of Religious schools, the Ministry of Agriculture, the “*Missions locales*”, the SMA (*Service Militaire Adapté*-Adapted Military Service), the SPR (*Savoirs Pour Réussir*-Knowledge for success) centres’ network, the EPIDE (*Etablissement Public d’Insertion de la Défense*-Public Institution of Ministry of Defense for Insertion of young adult) and the ANLCI. We are going to develop the specific contribution of those main Post JAPD partners.

#### *The Ministry of Education (regional administration and schools)*

A majority of draftees having literacy difficulties are still at school. Consequently, the first partner of JAPD is the Ministry of Education, through local education offices, schools and, in the central organisation, the DGESCO (*Direction Générale de l’Enseignement SCOLAIRE*-Department of Schooling). In this context, the main action of JAPD staff is to inform local education offices of the test results. Currently, in 2009, the transfer of results to education staff is not systematic (as it used to be previously). Identified draftees can refuse to have their results passed on. A large majority accepts. When the information arrives at the schools, school directors have to ensure that the identified students really do have difficulties (it is not always the case) and if so, what kind of support has already been offered to them (the majority of cases) or should be offered.

In 2008 92% (82% in 2004, 89% in 2006) of the regional organisations of the Ministry of Education (*Académies*) answered the questionnaire sent by the DGESCO about POST JAPD actions. The main findings were: a number of the individual forms concerning draftees identified as having literacy difficulties go missing between regional administration and schools. The *Académies* received 35,000 forms and the schools around 20,000.

Among the 19,711<sup>34</sup> identified students in the JAPD, 6225 were given a complementary diagnosis of their literacy competences, 2,204 received special educational support.

It appears that more than 90% of identified students are attending vocational training.

Among young adults identified in JAPD and beneficiaries of specific educational support in schools: 81% received individual support, 8% in a specific group, 11% other forms of support. Among young adults identified during JAPD and beneficiaries of a specific educational support outside school: for 11% it was in a MGI (*Mission Generale d'Insertion*, social inclusion agencies), 61% in an association, and 28% in other organisations. In general, the average duration of support is around 50 hours: courses delivered by French language teachers (69%), by teachers belonging to MGI (8%), identified members of associations (5%), and non identified persons or other teachers (18%).

The DGESCO added that the assessment made by JAPD tests (when candidates are identified as being in profiles 1 to 4) very often did not match the teachers' diagnosis. Many of the students identified during JAPD as having literacy problems did not exhibit the same difficulties in their school work.

Nevertheless, the DGESCO wants to improve the post JAPD action. The DGESCO already noticed that the number of *Academies* (total 100) which have a named contact (a regional inspector) for JAPD increased also: 70 in 2004 and 77 in 2008.

If the educational system is already aware of the literacy problems of some students, the JAPD results, because of their external nature, underline concerns about these needs and act as a catalyst for taking account of students' literacy needs and for providing them with the support they need. We must remember that before Luc Ferry was a Minister of Education (2001), the French Educational system did not wish to be open about literacy difficulties.

When students have left school the situation is more difficult even though the Ministry of Education established specific measures like MGIs (*Mission Générale d'Insertion*-Youth Inclusion Agencies) focusing on students without diplomas or with low levels of educational attainment, the first year after they leave the educational system. After a new protocol was signed in April 2004, the MGI have been directly informed by DSN of the

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<sup>34</sup> Figures relating to the 92% of responding regional administrations of the Ministry of Education.

young adults identified as having literacy difficulties as soon as they leave. As in France, compulsory education ends at 16, a significant number of draftees identified have already left school. For this reason partners other than the Ministry of Education are involved in post JAPD action.

#### *Religious schools*

Religious schools are the most common private schools in France, and they are mainly Catholic. For the education sector the representative is the *direction diocésaine pour l'enseignement*. Since 2004 the DSN has been sending the personal data forms of students identified as having literacy difficulties directly to the relevant *direction diocésaine pour l'enseignement*. Because the partnership between Catholic schools and other partners is quite new, it is not possible to provide any statistics at a national level, even though work is being carried out on the field.

#### *Ministry of Agriculture*

The Ministry of Agriculture has its own schools, especially at secondary level. In 2008 66,500 students, 22,000 apprentices, and 75,000 interns attended Ministry of Agriculture schools. There are 848 private and public secondary schools managed by the Ministry of Agriculture.

Since the protocol was signed in 2004, the DSN has sent the personal data form of the identified draftees directly to the DRAFs (*Directions Régionales de l'Agriculture et des Forêts*-Regional Directorates of Agriculture and Forests), which distribute them to schools. Following the protocol, every school has to arrange an interview with the young adults identified as having literacy needs to determine what kind of pedagogical support can be offered to them. After the interview every school sends a form giving information on the decisions taken during the interview to the DRAF, and DRAFs send that form to the BSN (local DSN offices). The return rate of forms from the school to the regional organisation is around 50%, but a lot of initiatives are taken within schools to tackle literacy problems.

For example in Brittany (a region in the west of France) the DRAF reports that, in 2008, 326 students were identified as having literacy needs. Of these 43% were girls and 57% boys. Students represented 82% and apprentices 18%. Most of the identified students (53%) were working towards a BEPA (*Brevet Enseignement Professionnel Agricole*-Technical School Certificate for Agricultural studies), 25% towards a CAPA (*Certificat d'Aptitude Professionnelle Agricole*-Certificate of Professional Competences in Agriculture).

### *Missions locales*

A *mission locale* is a service dedicated to the support of young adults from 16-25; it provides every young adult with individual answers to their questions about employment, training, health care, and housing and provides a personalised programme and tutor support to develop a vocationally-related project to help with getting and keeping a job.

At the beginning of 2008, the *Mission locales* network included: 420 *Missions locales* and 66 PAIO (*Permanence d'Accueil, d'Information et d'Orientation*-Permanent Place for Contacts, Information and Guidance). 11,049 professionals work in this network. In 2007, 995,000 young adults had at least one individual interview. The *mission locales* staff carried out 3,600,000 interviews.

*Missions locales* in 2007 received 46% of their funding from local authorities (including 18% from regions, 5.5% from *départements*, 22% from towns and local organisations) 40% from the State, 8% from the European Commission through the European Social Fund and 7% from other partners).

In 2007, the BSNs sent 22,144 individual forms to the *Mission locale*, after JAPD interviews. Because a lack of information in the *Mission locale* data collection system, it is not possible to give statistics for 2007 on how the *Mission locale* and PAIO took account of the JAPD assessments. It will be possible to do so in the near future after the individual data collection programmes are modified. Nevertheless, the representative of the National Council of *Mission locales* declared that according a recent survey about 90% of the *mission locales* have established good working relationship with their local BSN, and 34% have signed a special agreement contract formalising their relationship. The number of agreements will probably increase very soon.

It is also necessary to point out the agreements signed between *mission locales* and SPR, in the areas where SPR established its sites, and to underline the positive relationship between those two organisations. We can say the same about links between EPIDE, SMA and *mission locales*.

### *SPR (Savoirs Pour Réussir-Knowledge for Success)*

SPR is a programme of the *Fondation des Caisses d'Epargne pour la Solidarité* (FCES, a private bank foundation, created in 2001, and State approved). The first SPR centre opened in Marseille, in 2003. By July 2009, SPR had 23 centres in metropolitan France, in which 1500 young adults have been tutored by 500 volunteers, and 40 professionals (paid by the project). In 2006 the number of young adults who came through to SPR centres was 506, and the number of tutors 200. Tutors are volunteers, but

they are trained by SPR, for at least 8 days, with different optional training sessions. From the beginning, SPR activities and partnerships were organised by a convention signed between the Ministry of Defence, the Ministry of Education, the Ministry of Employment, the Ministry of Agriculture, the ANLCI, the National Council of *Missions locales*, and the Catholic schools organisation.

In 2008, 41% of attendees were referred to SPR centres by *Missions locales*, 5.5 % by the JAPD. The latter number is very low, the reason being that some young adults go first to *Missions locales* or other organisations before those organisations decide to refer them to SPR. A new convention will be signed in September by SPR partners to reinforce the cooperation (especially regarding referrals of young adults with literacy needs) between the post JAPD partners.

In June 2009 3 SPR centres tested an internet tool, EVADO, designed to evaluate the level of literacy and numeracy of adults. This tool has been developed under the direction of ANLCI (50% of the funding) and the CNFPT (*Centre National de la Fonction Publique Territoriale*-National Centre for Training Local Public Servants). In July 2009 some *Missions locales* and EPIDE centres applied to try this tool. This is a new step in the coordination of public policy to address literacy needs in France.

*EPIDE (Etablissement Public d'Insertion de la Défense*-Public Institution of Ministry of Defense for Insertion of young adults)

Created on August 2<sup>nd</sup> 2005, EPIDE is a Public Institution in charge of monitoring the Ministry of Defence's 2<sup>nd</sup> Chance programme. Its mission is to lead to the professional and social integration of young adults (18-22) experiencing difficulties at school, without qualifications, unemployed, and at risk of exclusion. Trainees are volunteers; they could stay in the EPIDE centres from 8 months to 2 years.

The four main goals of the EPIDE programme are Socialisation, Training (*formation*), Integration and Guidance.

There are 21 centres in metropolitan France. In 2007, 5008 young adults were invited for an interview. 49% were invited after a JAPD interview, 26% after an interview in *Missions locales*, 25% by unsolicited application. 1512 young adults were selected (20% JAPD, 43% *Missions locales*, 37% unsolicited application).

2008 Results: Among the 2910 trainees who had been through the EPIDE centres, 333 found a permanent work, 219 temporary work (6 months), 178 are still in the centres, 177 got an apprenticeship contract, 144 a contract for vocational training, 55 have been guided elsewhere, 26 got a temping

contract, 15 a contract for a placement. 21% work in the building industry, 14% in the army, 13 % in services (for private firms), 12% in social services, 10% in restaurants and hotels, 9% in transport.

Around 40% of trainees are considered as having literacy needs. This figure could be confirmed if EPIDE decide to use EVADO, the ANLCI computer (or internet) testing tool.

#### *SMA (Service Militaire Adapté-Adapted Military Service)*

This structure was created in 1961. Its mission was to combine Military Service, professional training and address literacy needs. After the end of conscription the SMA continued its mission.

There are 7 centres overseas and one in metropolitan France. In 2008, around 2900 young adults were drafted in the 7 centres.

Applicants must be over 18. They are selected from among around 5800 applicants. The training lasts 12 months. Many young adults have an interview during JAPD, but a lot of them have to wait because they are too young to join the SMA.

82% are unemployed or in additional training

#### *ANLCI (Agence Nationale de Lutte Contre l'Illettrisme-National Agency for Combating Illiteracy)*

Even if the ANLCI does not provide courses itself, it works very actively to coordinate the action of the numerous agencies involved in the JAPD and post JAPD actions. The JAPD matches exactly with the 3 main missions of the ANLCI: to measure, to coordinate and to provide tools. Its coordination function is facilitated by the fact that all the ministries involved in those activities are members of its board of directors and other partners (such as private schools, SPR or *Missions locales*) are members of its advisory council.

Encouraging cooperation between the JAPD partners is a very important part of the ANLCI's promotion work. The ANLCI also promotes good practice and regards the JAPD as an essential element of their work. In the National Forum of Good Practice (organised from 2004) in 2007, the Nord-Pas-de-Calais region chose the PAPIES project as the good practice example: its goal is to make post JAPD contacts more efficient by training professionals in charge of initial contact with draftees identified as having literacy difficulties, and by providing tutoring. The ANLCI has collected other local practices linked with the JAPD and these are available on its web site: [www.anlci.gouv.fr](http://www.anlci.gouv.fr)

## *Results and impact analysis*

### *Statistical aspect of JAPD: Issues and Impact for Advocacy*

#### *A very useful indicator*

Nevertheless, the tests taken during the JAPD also supply national and local statistics which are used as a reference for public authority action in relation to young people. Because of the great number of attendees and their good geographical distribution, it is possible to produce test results for each French region and each French *département*. Figures are provided every year after collecting all the data by the DSN (Ministry of Defence) and then compiled by the DEPP (Ministry of Education). In comparison, the IVQ survey (*Information et Vie Quotidienne*-Information and Everyday life) is carried out only every 6 or 7 years, and without special regional extension of the national sample, IVQ cannot provide regional figures about adults with literacy needs.

Because of those particularities JAPD statistics are more often used in regional reports or regional action plans than IVQ.

For a while national authorities and the ANLCI expected that IVQ tests and JAPD tests would be comparable (providing the same result as having difficulties or not) for a similar sample. But a recent study carried out by the ANLCI showed that the two tests are not testing the same literacy competences. Nevertheless, even if the two statistical sources do not provide the same measure of literacy levels in a similar population, they order the geographic spread in the same way. JAPD and IVQ tests results allow national and regional stakeholders to highlight the places where special efforts have to be made for improving literacy.

Below are two tables summarising JAPD statistics by regions and *départements* over the 5 last available years (source Ministry of Defence and Ministry of Education, compiled by the author).



Table 2 - Percentage of draftees with literacy problems by region (metropolitan France)

region	nom	gdifff2004	gdifff2005	gdifff2006	gdifff2007	gdifff2008
11	ILE-DE-FRANCE	3,8%	3,9%	4,5%	4,7%	4,7%
21	CHAMPAGNE-ARDENNE	6,4%	5,3%	5,2%	6,0%	6,1%
22	PICARDIE	6,8%	7,0%	8,1%	8,3%	7,8%
23	HAUTE-NORMANDIE	5,2%	5,4%	6,8%	6,0%	5,1%
24	CENTRE	4,4%	4,0%	4,3%	4,8%	4,8%
25	BASSE-NORMANDIE	4,8%	4,9%	5,6%	5,3%	4,9%
26	BOURGOGNE	5,1%	4,5%	5,3%	4,8%	4,9%
31	NORD-PAS-DE-CALAIS	7,2%	6,7%	7,5%	7,8%	7,5%
41	LORRAINE	3,6%	3,7%	4,0%	4,0%	4,1%
42	ALSACE	5,2%	5,2%	5,3%	4,9%	5,1%
43	FRANCHE-COMTE	4,6%	2,9%	2,8%	3,6%	3,5%
52	PAYS DE LA LOIRE	3,8%	3,8%	4,1%	3,9%	3,9%
53	BRETAGNE	3,1%	3,1%	3,3%	3,6%	3,7%
54	POITOU-CHARENTES	4,6%	4,2%	4,1%	4,8%	4,7%
72	AQUITAINE	3,7%	4,0%	4,4%	5,0%	5,1%
73	MIDI-PYRENEES	2,7%	2,6%	3,4%	4,1%	3,9%
74	LIMOUSIN	4,0%	3,7%	3,9%	4,4%	3,8%
82	RHONE-ALPES	3,5%	3,7%	4,1%	3,9%	4,0%
83	AUVERGNE	3,2%	3,1%	2,6%	2,5%	3,0%
91	LANGUEDOC-ROUSSILLON	5,2%	4,8%	5,0%	5,2%	5,4%
93	PROVENCE-ALPES-COTE D'AZUR	5,1%	4,5%	4,9%	5,4%	5,5%
94	CORSE	5,9%	3,1%	4,5%	5,5%	2,6%
	Ensemble	4,4%	4,3%	4,8%	4,9%	4,9%

Table 3 - Percentage of draftees with literacy needs by départements

dept	nom	gdifff2004 profils 1 et 2	gdifff2005 profils 1 et 2	gdifff2006 profils 1 et 2	gdifff2007 profils 1 et 2	gdifff2008 profils 1 et 2
01	Ain	3,8%	4,7%	4,1%	4,4%	3,9%
02	Aisne	7,7%	8,1%	9,0%	9,5%	8,6%
03	Ailier	3,9%	3,6%	3,1%	3,2%	3,4%
04	Alpes-de-Haute-Provence	4,7%	3,3%	4,1%	3,9%	4,1%
05	Hautes-Alpes	3,0%	2,4%	2,9%	3,0%	2,5%
06	Alpes-Maritimes	4,1%	3,4%	4,2%	5,5%	4,7%
07	Ardeche	4,0%	3,9%	4,6%	4,2%	5,0%
08	Ardennes	7,0%	6,6%	6,3%	6,7%	6,2%
09	Ariège	3,8%	2,7%	3,4%	5,6%	5,7%
10	Aube	6,7%	4,7%	4,7%	6,1%	6,4%
11	Aude	4,0%	4,5%	4,0%	4,6%	3,7%
12	Aveyron	1,5%	1,9%	2,9%	3,3%	2,5%
13	Bouches-du-Rhône	5,8%	5,3%	5,6%	5,7%	6,2%
14	Calvados	5,2%	4,8%	5,0%	4,7%	4,6%
15	Cantal	3,2%	2,7%	2,8%	2,8%	3,8%
16	Charente	5,4%	4,6%	4,6%	5,0%	4,8%
17	Charente-Maritime	4,0%	4,0%	4,0%	4,6%	4,8%
18	Cher	4,5%	3,7%	4,5%	4,9%	5,0%
19	Corrèze	3,6%	3,5%	3,5%	4,1%	3,5%
21	Côte-d'Or	4,7%	4,4%	5,0%	4,2%	3,7%
22	Côtes-d'Armor	4,0%	3,6%	3,9%	4,6%	4,5%
23	Creuse	5,0%	4,9%	4,4%	7,1%	5,4%
24	Dordogne	3,8%	3,7%	4,5%	4,7%	6,1%
25	Doubs	4,2%	2,2%	2,2%	2,6%	2,9%
26	Drôme	4,7%	4,7%	5,8%	5,3%	5,3%
27	Eure	5,5%	5,9%	7,3%	6,2%	5,0%
28	Eure-et-Loir	4,9%	3,8%	4,4%	5,6%	5,0%
29	Finistère	3,1%	2,7%	3,1%	3,4%	3,3%
2A	Corse-du-Sud	5,9%	3,1%	5,3%	6,5%	2,8%
2B	Haute-Corse		3,1%	3,7%	4,2%	2,5%
30	Gard	6,4%	7,2%	6,9%	6,6%	6,6%
31	Haute-Garonne	2,4%	2,5%	3,4%	4,0%	3,6%
32	Gers	2,7%	1,9%	3,3%	4,1%	5,0%
33	Gironde	4,0%	4,2%	4,7%	5,4%	5,6%
34	Hérault	5,1%	3,6%	3,9%	4,8%	5,6%
35	Ille-et-Vilaine	3,0%	3,1%	3,5%	3,7%	3,8%
36	Indre	4,3%	4,4%	5,6%	5,1%	5,2%
37	Indre-et-Loire	4,5%	3,8%	3,8%	4,0%	4,1%
38	Isère	3,2%	3,4%	3,6%	3,9%	4,1%
39	Jura	5,0%	2,8%	2,8%	3,9%	3,9%
40	Landes	3,9%	4,2%	4,2%	4,6%	4,2%
41	Loir-et-Cher	4,6%	4,0%	4,5%	4,8%	4,9%
42	Loire	4,1%	4,2%	4,4%	4,5%	4,3%
43	Haute-Loire	3,3%	2,9%	2,3%	2,2%	2,4%
44	Loire-Atlantique	3,7%	3,6%	3,6%	3,2%	3,2%
45	Loiret	3,9%	4,1%	4,2%	5,0%	5,0%
46	Lot	2,6%	2,5%	3,4%	4,1%	3,5%
47	Lot-et-Garonne	3,7%	4,6%	4,9%	6,1%	5,7%
48	Lozère	4,2%	4,5%	4,3%	6,5%	4,7%
49	Maine-et-Loire	4,3%	3,9%	4,1%	4,1%	4,0%
50	Manche	4,3%	4,5%	5,1%	4,4%	4,3%

51	Marne	6,4%	5,1%	5,0%	6,1%	6,3%
52	Haute-Marne	5,1%	4,7%	4,6%	4,7%	4,9%
53	Mayenne	3,1%	4,1%	4,2%	4,3%	4,1%
54	Meurthe-et-Moselle	3,2%	3,1%	3,9%	3,5%	4,0%
55	Meuse	3,4%	3,5%	4,1%	4,9%	4,9%
56	Morbihan	2,4%	3,2%	2,9%	3,1%	3,3%
57	Moselle	3,8%	3,9%	4,1%	4,2%	4,2%
58	Nièvre	5,8%	4,7%	5,0%	4,4%	5,4%
59	Nord	6,9%	6,7%	7,3%	7,4%	7,2%
60	Oise	6,0%	6,3%	7,9%	7,8%	7,4%
61	Orne	4,8%	5,8%	7,7%	8,0%	6,5%
62	Pas-de-Calais	7,8%	6,8%	8,0%	8,4%	7,9%
63	Puy-de-Dôme	2,8%	3,0%	2,5%	2,1%	2,9%
64	Pyrénées-Atlantiques	3,0%	3,3%	3,4%	3,7%	3,7%
65	Hautes-Pyrénées	3,2%	3,1%	4,1%	4,7%	4,0%
66	Pyrénées-Orientales	4,9%	4,1%	5,3%	4,1%	3,9%
67	Bas-Rhin	4,4%	5,1%	5,4%	4,7%	5,0%
68	Haut-Rhin	6,1%	5,3%	5,2%	5,0%	5,2%
69	Rhône	3,8%	4,0%	4,1%	3,9%	4,3%
70	Haute-Saône	5,4%	4,1%	3,6%	5,1%	4,6%
71	Saône-et-Loire	4,6%	3,8%	5,4%	4,6%	4,5%
72	Sarthe	4,3%	4,7%	5,9%	5,3%	5,8%
73	Savoie	2,3%	2,5%	3,1%	2,6%	2,9%
74	Haute-Savoie	2,5%	2,5%	3,8%	2,6%	2,5%
75	Paris	3,0%	2,7%	2,9%	3,3%	3,6%
76	Seine-Maritime	5,1%	5,1%	6,6%	5,9%	5,1%
77	Seine-et-Marne	4,1%	3,5%	4,1%	4,6%	4,7%
78	Yvelines	2,7%	3,0%	3,1%	3,5%	3,6%
79	Deux-Sèvres	4,4%	3,3%	4,3%	5,0%	4,8%
80	Somme	7,0%	7,0%	7,5%	8,0%	7,7%
81	Tarn	3,1%	2,4%	2,9%	4,3%	4,0%
82	Tarn-et-Garonne	3,9%	3,9%	4,0%	4,0%	4,8%
83	Var	4,5%	3,9%	4,3%	5,1%	5,5%
84	Vaucluse	6,3%	5,3%	5,8%	5,6%	5,5%
85	Vendée	3,4%	3,2%	3,4%	3,7%	3,2%
86	Vienne	4,9%	4,7%	3,8%	4,7%	4,5%
87	Haute-Vienne	3,9%	3,4%	4,0%	3,7%	3,5%
88	Vosges	4,2%	4,2%	4,3%	4,2%	3,5%
89	Yonne	5,9%	5,6%	5,7%	6,5%	6,7%
90	Territoire de Belfort	3,9%	3,6%	3,7%	4,2%	2,5%
91	Essonne	3,2%	3,4%	4,3%	4,2%	4,2%
92	Hauts-de-Seine	2,9%	2,9%	3,1%	3,6%	3,5%
93	Seine-Saint-Denis	6,5%	7,1%	8,1%	8,5%	8,3%
94	Val-de-Marne	3,7%	4,6%	4,9%	4,7%	4,8%
95	Val-d'Oise	4,5%	4,5%	5,4%	5,6%	5,2%
<b>Ensemble</b>		<b>4,4%</b>	<b>4,3%</b>	<b>4,8%</b>	<b>4,9%</b>	<b>4,9%</b>

### *Impact of statistics and advocacy*

JAPD statistical test results are commonly used in advocacy for literacy projects in regions and local areas, and inform regional plans for tackling literacy needs implemented by the ANLCI Regional Project Managers and signed by all the partners who try to improve literacy competences of the local population.

Many articles are written every year quoting the JAPD; it would be very onerous to gather all the articles published in national, regional or local newspapers, in national magazines and in other press sources, an estimate would be in the thousands (19,000 references on Google). This profusion of references shows that the regular publication of JAPD results encourages the debate on literacy needs in France.

### *Post JAPD impact for young adults*

It is difficult to assess precisely the impact of Post JAPD actions carried out by JAPD partners. All of them confirmed that the JAPD process gives the opportunity to examine each year, another time the basic competences of each member of a complete generation. Direct beneficiary is the young adult facing difficulties, because he will meet an adult (during the JAPD or in his school) who will put him in front of his difficulties and will offer him information to challenge those difficulties.

SPR and EPIDE were created because of JAPD. They are new opportunities (different from what already existed before their creation) offered to young adults facing literacy difficulties. Because of JAPD, (public or private) schools focus always much more on students with lower levels of literacy, alone or in cooperation with local authorities. They wonder about the course to be followed and they keep more in consideration the problem of students with lowest literacy levels. Following the JAPD identification, thousands of students benefited from retesting and personal evaluation of their orientation.

The other positive impact of JAPD is the development, on the field and at national level, of cooperation between very different stakeholders, from volunteers to representatives of ministries. This cooperation looks to be in expansion year after year, and more fruitful as well; another benefit concerns the better knowledge of other stakeholders' specificities and priorities, the exchange of good practices, the cooperation in concrete projects. It is a concrete demonstration of ANLCI goals.

### **3.3 Portugal, Centre for New Opportunities**

by the German Institute for Adult Education Leibniz Centre for Lifelong Learning

#### *Problems faced*

The population in Portugal consists of a high number of school drop-outs and a proportionally low number of people graduating at higher school or university level. These numbers lie significantly behind the European average which Portugal has to match, being a member of the European Union.

The main reason for the low number of formal vocational qualification graduates is not only the high rate of school drop-outs, but also the significant number of people who start working in a specified occupational field without ever acquiring official certification. Nevertheless, it is assumed that these untrained workers have modest non-formally acquired skills and competences due to their experience on the job. However, these skills are not visible on the labour market for they have never been validated. For this reason, Portugal needs an improvement of the qualification systems for lower skilled people, as well as a system to validate non-formal skills and competences.

To upgrade lower qualifications or validate skills acquired through practice in 2006, the so called “New Opportunities Centres” were set up by the National Agency for Qualification, which is in turn under the control of the Ministry of Labour and Social Solidarity. The Centres are located all over the country and integrated in different institutions such as schools, job centres or companies. The main two purposes of the Centres are on the one hand to offer guidance and counselling in terms of possible training pathways, qualification and certification opportunities for lower skilled people who need to continue education. On the other hand the Centres identify the options for validation and certification of existing competences that workers acquired through long term practical experience on the job.

In 2009, 456 Centres exist in all regions of Portugal. 761.605 Portuguese have been registered at the Centres since 2006. By 2010 it is planned to open new Centres, so that over 500 New Opportunities Centres will exist in total. Over half of the 761.605 people who registered have been enabled to move their former qualification level one step up. The main aim of this

measure is to continuously increase this number and, therefore, to contribute to Portugal's progress in becoming a more competitive country in the European Union.

The initiative is selected as a Case Study of good practice because it shows concretely how a certain political strategic plan can tackle a country's problematical situation in regard to education and qualifications and lead to a measurable prompt impact. The New Opportunities Initiative, relaunched by the government in 2006, already features considerable results which are further described below.

However, it is to be factored in that Portugal holds a concrete economic and political interest in improving the average qualification level of the working population and in making non-formally acquired skills visible. Portugal is lagging behind the European average regarding education and economic performance. The New Opportunities Initiative is therefore one of the country's strategies to compete favourably on European level by successively providing qualifications and certification to the lower skilled part of the population.

#### *Lessons learned and reasons that explain the relevance of the Good Practice*

In the last decade of the 20th century, adult education gained a higher profile in Europe within the paradigm of lifelong learning which features very diverse forms in member states' national educational systems. Portugal, which lagged behind other European countries, did not escape this development. The adult education system, which was practically non-existent prior to the Carnation Revolution in 1974, was still suffering from structural faults but still had to respond to the relatively high number of Portuguese citizens with inadequate basic education and offer them opportunities to catch up on further education and gain further qualifications.

A central plank of the response to this problem was the creation of the first six *Centres for Recognition, Validation and Certification of Competences* in 1999 as a first point of contact for adults over the age of 18 where the skills they gained casually and informally could be assessed and accredited, or where they had access to formal education opportunities to compensate for the further education they missed.

This approach stems from the fact that, in 2001, 44% of the Portuguese population had left secondary school before completing their 9th year, which contrasts with a European average of about an 18% school drop-out rate. The centres aimed to offer help to redress the low educational standard of the population and gradually to improve the competitiveness of the Portuguese work force in Europe.

To talk about adult education in Portugal before 1974 is a difficult, if not impossible, endeavour. Before the Revolution, education was entirely under the dictatorial regime of Salazar and finally, his successor Caetano, who also focused his political attention on wars in the colonies rather more than on investment in the education system and the mature citizens that would grow out of it.

Only after the Revolution on 25 April 1974, was it clear how much the education system in Portugal had been neglected. Improving the situation may be viewed more as a social mission than an educational policy (Silva 1990).

The figure of 78% of the population whose school education does not extend beyond the five-year secondary school (*basic education level* – up to the 9th year), and who have thus not completed any formal vocational education, is a serious problem and places Portugal well below the European average as regards its standards of education. Only 5% of the working population have ever taken part in adult education provision, although a large number have attended informal vocational training courses that are not accredited.

This suggests that, for one thing, young people in particular have to be reached and advised to continue their education and/or to acquire their school leaving certificate at a later date. On the other side, adults must be given the opportunity to have their casually and informally acquired skills validated retrospectively. The lack of a certification system presents a specific problem for the Portuguese working population as it may be assumed that a large number of skills exist within the population, representing unused potential for the labour market that has still to be assessed.

Attempts are now being made to establish appropriate structures to assess casually and informally acquired skills in the adult working population, and make this potential transparent for employers through certification. A number of adult education institutions are attempting to implement training and certification systems.

However, in order to guarantee the uniformity and effectiveness of the strategy and, ultimately, to realise the goal of involving one million adults either in further training or in accrediting their skills by the year 2010, the National Agency for Adult Education and Training was set up in Portugal in 1999. It was created as an agency of the Ministry of Education and the Ministry of Labour and Social Solidarity, following UNESCO's CONFINTEA V adult learning conference in 1997 in Hamburg. The Agency was to draw up a plan and find solutions to the problematic situation in Portugal with regard to adult education.

The necessity of bringing the level of education of the working population in line with the rest of Europe was the highest priority in Portugal in the last decade of the 20th century. The Portuguese school system is divided into two phases: the primary phase comprising Years 1-4, and compulsory secondary school from Years 5-9. This is followed by optional attendance at a three-year *Escola Secundária* (Upper Secondary) through which university entry can ultimately be achieved. However, only 20% of the Portuguese population has attended upper secondary education and the number of early school-drop-outs is still high.

The newly-appointed National Agency for Adult Education faced these problems and directed its focus in particular towards the identification and recognition of existing skills in the adult population. Assuming that a large potential of skills and proficiencies, gained through life experience, employment and non-accredited training, is hidden in the working population bringing this to the fore then had the highest priority. To this end a *National System for Recognition, Validation and Certification of Competences* was developed and subsequently the first six centres in the country were opened in December 2000.

An additional goal to be pursued through the centres was the counselling and motivating of young people with low educational achievement to gain further qualification and also to catch up where possible by completing their school leaving certificates, in order to be better able to survive in the employment market. In this way, the particular problem of the first target group could perhaps be avoided for the latter group. With the often low qualifications of the working population, the risk of unemployment is often looming around the corner and low-qualified workers have to struggle with bad working conditions and low wages. Therefore the goal of the National Agency for Adult Education was, first of all, to change this situation in the foreseeable future, through qualifications and, above all, through certification.

The parties concerned suffered demoralisation, however, when the Agency was closed in 2002 as a result of the change in government. The decision to close the Agency, made by the ultraconservatives, suggests that in large sections of politics and society, no awareness had yet been achieved regarding the lack of highly-qualified citizens, and the need for further qualification or certification was still not recognised. In relation to the competitive ability of Portugal as an equal partner in the European Union, these issues do not seem to have been considered. The issue of the level of education of the population in Portugal as a whole was only taken up again at the beginning of 2006 with the winning of the election by the Socialist Party. At the beginning of 2006, the initiative was restarted by the government under the title of New Opportunities. It was coordinated by the newly formed National Qualification Agency. This was now under the control of the Ministry of Labour and Social Solidarity and had financial, academic and pedagogic autonomy. Rather than just concentrating on validation and certification, the goal of this Agency is to advance the paradigm of lifelong learning as far as public awareness is concerned and to put into place a wide selection of systems for further qualification *and* assessment and accreditation of skills in various institutions.

#### *Method used*

The New Opportunities Initiative makes a distinction between the two main target groups, each with a different focus. The two different groups that must be reached through the initiative are young people and adults. For young people, it is important to open up more options and to advise them in relation to:

- employment training
- further education
- specialist courses
- catching up on school leaving certificates.

For adults, the focus has to lie in the areas of:

- recognition, evaluation and accreditation of skills
- adult education courses
- modular qualification opportunities
- catching up on school leaving certificates.



The initiative expresses this two-way direction with the slogan: "*An opportunity, new for the youngsters and a new opportunity for adults*".

A catalogue of qualifications at national level had first to be developed as the basis for the appraisals used for competence measurement, counselling and design of further education opportunities. Standards laid down for the various job profiles and the corresponding training would be defined in this catalogue to allow benchmarks for recognition of skills to be determined. In this context, reference framework would be published in which the key skills that are required for the certificate level in question are named and specified precisely. Moreover, publications would be compiled in which the methods, quality management as well as the implementation of accreditation through the New Opportunities Centres would be described.

The initiative is now so developed that the New Opportunities Centres are to be found located in various institutions, private or public, where young people and adults can consult qualified counsellors. Following registration at the Centre, the procedure continues with a preliminary *diagnosis* being made, through which the progression route to be taken is clarified. Following this, personal guidance takes place selectively, in order to assess the casually acquired skills already available or to choose the appropriate further education option.

The New Opportunities Centres are to be found in:

- state schools
- job training centres
- professional associations
- town halls
- local associations
- private companies
- not-for-profit institutions
- other local establishments and organisations.

9168 counsellors, who are suitably trained for the position and so have an overview of qualification and certification opportunities as well as demonstrating appropriate advisory skills, work in all of the 456 Centres that are spread out all over Portugal, mainly integrated in State schools.

Through the embedding of the centres in training establishments, the person being advised can be directly referred on to the site where either their available skills can be assessed, validated and certified, or they can be

offered suitable further qualification opportunities and possibly be registered immediately in the affiliated institution for a scheme or course.

#### *Solution adopted to the initial problem*

The New Opportunities Centres are available to adults from the age of 18 who have dropped out of their school education and/or have no job training. Once individuals interested in seeking advice have registered in a centre, important basic data are entered onto the SIGO programme (*Sistema Integrado de Informação e Gestão da Oferta Educativa e Formativa*) and these are then saved on the Centre network and can be centrally administered.

It is only after registration that a diagnostic assessment of the individual's case is made with the help of interviews, analysis of the curriculum, group discussions as well as individual talks with vocational experts, and a qualification plan can be prepared. This plan may include a strategy for appropriate further training that can range from school leaving certificates to job training through to planned additional qualifications. However, a competence assessment and certification process may also be the goal, in which case the Centres will remain involved to a greater degree.

The certification method has been especially created and accredited for the New Opportunities Centres. As a first step, the candidate establishes the actual and current extent of their own skills, whereby the skills and proficiencies gained through practical life experience and used in employment are specifically evaluated and assembled in a portfolio. The centres offer training for this if necessary through which the participants are taught the concept of the definition and recognition of key competences. This self-assessment of skills is followed by an appraisal and finally certification by a panel made up of vocational and teaching experts responsible for the centre in question.

What is crucial in the validation of skills processes and the final certification is that the adults additionally learn to summarise what they have already achieved in the course of their lives and are now in a position to reflect on, and finally to communicate this to the outside world. The meaningful process begins at the moment when the previously unrecognised proficiencies and skills are made apparent which is what makes them of actual practical use in the first place.

Depending on the qualification level in question, the actual certification, which is finally carried out by a full panel, is based on the various official guidelines for the relevant competence profiles.

For the certificates, which are comparable to a school leaving certificate after the 9th year, the following four areas of competence have to be covered:

- Language and Communication
- Mathematics (for everyday life)
- Information and Communication Technology
- Citizenship and Employability.

For the certificates which are comparable to a school leaving certificate after the 12th year, the following areas of competence have to be covered:

- Citizenship and Vocational Training
- Sociology
- Technology and Research
- Culture
- Language and Communication.

Since it became possible, after 2006, to have employment skills accredited, the National Catalogue for Qualifications has been taken as a basis for this. To date certificates for thirteen different training qualifications can be issued through the Centres.

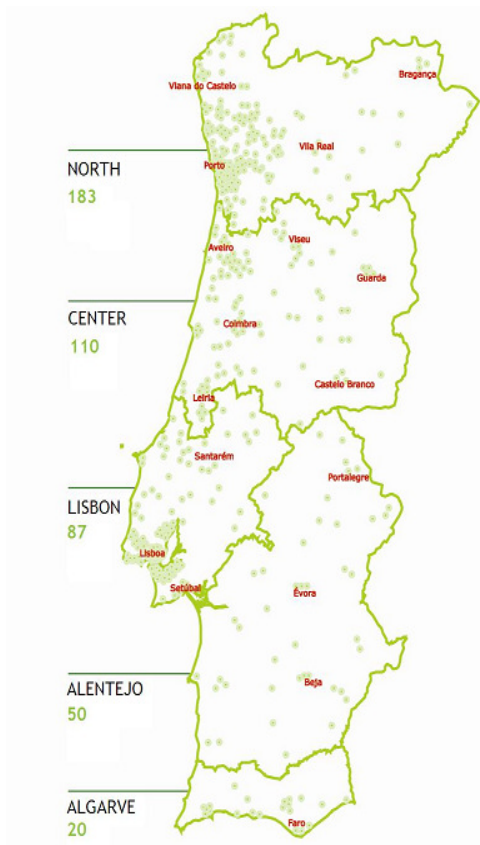
Since 2001, 93,546 Portuguese have been counselled regarding further education opportunities and 225,027 have obtained retrospective certification of their skills through the Centres. The registrations as a whole show that

- 54% of those registered are women.
- the average age is 37.
- 65% of those registered were in steady employment at the time of registration.

In relation to employment, significant differences have been noted; the figures show that 51% of those who received advice on further education opportunities were unemployed, while 74% of those who obtained certification of their skills retrospectively were in steady employment. Also, the average age differs; those who were advised on further education opportunities were 34 years old on average and those who obtained retrospective certification had an average age of 39. More than half of those who obtained certification retrospectively were women (56%); those who have gained further qualifications are also mainly women (62%).

With a total of 456 New Opportunities Centres to be found in different establishments in the country, a dense network has been created that guarantees contact points for adults in a location nearby.

Figure 1 – Portugal



Central control of the network ultimately occurs through the National Qualification Agency which is subordinate in turn to the Ministry for Labour and Social Solidarity.

Alongside the Centres that are to be found all over Portugal (see the map), six further Centres have been established on the island of Madeira.

There are plans to increase the number of Centres even further to more than 500 to reach and qualify Portuguese citizens nationwide.

### Transferability

The New Opportunities Centres register concrete achievements. Especially after the change of government in Portugal in 2005 and the conversion of the former *Centres for Validation and Certification of Skills* into the New Opportunity Centres, the figures clearly demonstrate the successful impact.

Since 2006, 761,605 registrations at the centres have been documented; of these about half of those registered were able to gain qualifications above the secondary school basic educational level, either through vocational further education provision or through catching up by achieving a 12<sup>th</sup> year

school leaving certificate, at the same time obtaining university entry level. Before the start of the New Opportunities Initiative in 2006 with its expanding well-networked centres all over the country, the figures were quite modest with only about 10,000 people in 2001 up to about 40,000 in 2004 registered in the then *Centres for Validation and Certification of Competences* in order to extend their skills or to have them accredited. Another significant difference is that before the year 2005, only registrations for the basic educational level up to the 9<sup>th</sup> year took place, whilst from 2007, the New Opportunities Centres made it possible for around half of the certifications and/or qualifications to be above secondary level. The number of people who have been advised on vocational training or further vocational qualifications since 2006 reached 93,546. A total of 225,027 individuals have gained retrospective certification of skills through the *Centres for Validation and Certification of Competences* and the New Opportunities Centres since 2001 so that, here too, a clear, noticeable impact and success of the initiative is apparent. The New Opportunities initiative has set a further target of qualifying 1,000,000 adults or having their skills validated and certified by 2010.

The evaluation of the initiative consists of annual monitoring at national as well as local level in the individual centres, and of a team comprising external experts carrying out an additional evaluation of the initiative. This external evaluation specifically focuses on issues such as how far skills can truly be made apparent through the initiative and its methods and whether awareness of the so-called key competences and their meaning can be raised at all by the assessment and certification of individuals. As the evaluation findings are still in the process of being analysed, no concrete results can be given at present. In this context, it should also be mentioned that Portugal – based on the goals in adult education that have already been achieved and can be evidenced – will now participate in the OECD's PIACC (*Programme for the International Assessment of Adult Competences*) study in which the skills and competences of adults will be surveyed internationally and compared just as those of schoolchildren are compared in the PISA study.

#### *Weak and strong aspects*

Finally, it should be noted that, alongside all the recorded achievements of the initiative, there are also doubts being voiced. It is clear that the initiative is driven by pure economic interests with the aim of increasing

the employability of adults and preparing them for competent performance and mobility on the job market. Of course, it may be questionable whether every individual can precisely establish the skills that will be useful for them in a job purely through self reflection. The question that logically follows is: how far do the counsellors have to assist and support participants in the process, and to what extent can this approach genuinely increase the heavily-cited human capital on the Portuguese employment market and thus make the Portuguese economy competitive, rather than an approach based on the educational system and knowledge-based society (Oliveira, 2008).

Nevertheless, the number of those further qualified and who have obtained certification has increased impressively in recent years and this proves that this scheme is obviously widespread and well-known, as the Centres are being sought out and made good use of.

Further Centres will be created to the year 2010 and qualification and certification will be continued – if possible until the magical million mark that has been envisioned is truly reached. What follows afterwards, and how or whether the Centres will continue their work under the same conditions, is still uncertain. What can now be determined with certainty is that by then, a large step for adult education in Portugal will have been taken.

Strong aspects	Weak aspects
Non-formal acquired skills of workers are recognized, validated and no longer remain the 'hidden potential'	
Lower skilled people get the chance to catch up on graduation and/or vocational training	Solely economic interests achieved with this measure to exploit human resources, possibly disregarding individual interests
A high number of individuals (225.027) have caught up on certification until now, the number of registrations is still increasing	
New Opportunities Centres are spread all over the country, good accessibility due to integration in different institutions, companies etc.	
	Continuation, governing and funding of the New Opportunities initiative correlates with the interest of the current government (Socialist Party), former version of the initiative has already been ended in 2002 by closing the responsible National Agency for Adult Education by the ultraconservative government

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### **3.4 Sweden, Guidance, Validation and Preparatory training (Vocational Training Course for Immigrants: Job in the Residential Area-JOIN)**

by Nils Friberg

#### *Problems faced*

A considerable number of immigrants in Sweden suffer from a lack of Swedish language skills. The lacking language skills evoke obstacles for immigrants on the Swedish labour market with its specific demands, like experience in terms of job conditions, formal and language skills. In addition, many immigrants do not participate in the Swedish societal life and experience difficulties regarding their integration. The acquired *formal* education and training skills of immigrants in Sweden oftentimes are lower than those required on the labour market.

Developed by the Municipal Adult Learning Centre and the Guidance and Learning Centre in the Municipality of Kristianstad in Sweden, a tailor made course is implemented to meet these specified requirements of immigrants. The *Vocational Training Course for Immigrants: Job in the Residential Area* (JOIN) is a training programme that firstly gets hold of the target group by several outreach activities, whereas afterwards individual study plans are created together with the learners. JOIN is an example of a much bigger Initiative.

22 participants are selected to take part in the course, which is divided into language and vocational training.

The two main objectives of JOIN are that the participants obtain a job after finalising the training, and their integration in Swedish society should subsequently be improved.

The example of good practice is selected as a Case Study to present an efficient method of enabling immigrants to improve their language and vocational skills by providing them with an individual study plan. Like other examples of good practice in this study show, it seems that it is a sensible approach to connect learning with the individual everyday and working life of the learner.

JOIN seeks to develop not only a programme for immigrants to improve their language and vocational skills, but also to involve and accommodate



their individual requests. This particular element of JOIN is described in detail in the following Case Study.

*Lessons learnt and reasons that explains the relevance of the Good Practices*

The *Vocational Training Course for Immigrants*, JOIN, was created with the intention to overcome obstacles to access to work and in a wider sense to improve integration into Swedish society.

The Swedish case study has involved the following beneficiaries: male and female immigrants without a job and with poor knowledge of Swedish.

JOIN has been highly effective in supporting those with a low formal level of education (below EQF Level 2) to take up learning again and add to the competences gained in their native countries with new updated knowledge.

This case represents a model of policy transfer, in that it is founded on the vast Swedish Adult Education Initiative, AEI, (“Kunskapslyftet”) five-year programme during the years 1997 to 2002. This example has its roots in the national guidelines outlined in the 2001 Government Bill following up the AEI.

The case study presented here started in August 2005 and ended in July 2007. The project was called *Job in the Residential Area*, JOIN, (“*Arbete i Närmiljö*, AIN”) and comprised 22 people in all. It was financed through a tripartite agreement between the Municipality of Kristianstad, the Employment Agency of Kristianstad, and the European Social Fund. It has shown the capacity to give immigrants vocational training and to make them aware of the possibilities of lifelong learning.

In this initiative the individual's needs, living conditions and wishes are the focus, and thus the training is driven by the individual's demands. Each individual should be able to find a solution for his or her learning needs. The intention is that the individual's position in the labour market should be strengthened. The municipality has had overall responsibility for the organisation, preparation, and implementation of the programme.

The *Vocational Training Course for Immigrants* programme aimed to break down barriers to entry into education for low-skilled immigrant workers with a low level of formal education, EQF Level 1, and at risk of being excluded from the job market.<sup>35</sup>

The targeted groups, male and female immigrants, were receiving social welfare benefits, or redundancy payments from the Employment Office.

The project is based on the guidelines of the Government Bill (Adult Learning and the Development of the Adult Education, prop. 2000/01:72) passed in the Swedish parliament (“*riksdagen*”) in 2001. This bill presents the aim that: “All adults must be given the opportunity to broaden and deepen their knowledge and skills in order to promote personal development, democracy, equality of opportunity, economic growth and employment, and an equitable distribution of wealth.”

The Government wanted to create a new infrastructure for adult learning constructed on the needs of adult learners. According to the Government, there are some key points that ought to be in place in order to give good support to a learner:

- A desire to learn
- The supply of education - freedom of choice and diversity
- Counselling and guidance
- Approaches customised to the adult's individual circumstances
- A good study support system
- Learning at the workplace
- Customised pedagogical approaches
- Validation of a learner's competences and knowledge

As an extra means of stimulation for the municipalities, special funding was granted following an application. For the Municipality of Kristianstad this sum was 2.7 million SEK (about 270,000 Euros). As a result, Kristianstad could implement the plan to build a new innovative centre. The centre started its activities in the spring of 2003 through a partnership between the Municipal Adult Education Centre (“*Vuxenutbildningen*”), and a new unit, the Guidance and Learning Centre, GLC (“*Väglednings- och lärcentrum*, VLC”). The following were target areas for the GLC:

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<sup>35</sup> It is an umbrella programme JOIN has been developed from.

- Outreach activities
- Educational and vocational guidance
- Accreditation of prior learning (APL)
- E-learning
- Orientation courses
- Tenders concerning externally bought training courses with an innovative profile
- EU programmes and other international contacts
- Regional cooperation in Scania North East (“*Skåne Nordost*”) - seven municipalities of about 200, 000 citizens in all.
- Managing and chairing the Local Competence Council

In this context and with these target areas as a background GLC continued working on training issues for adult immigrants, particularly with a view to overcoming problems like insufficient language skills in Swedish, the need to develop competences in people with low skill levels, and the difficulties these people face in gaining employment.

An analysis of the existing problems and of the resources to solve them is shown in *Table* below:

*Table 1 - Problems to be solved*

<b>Obstacles to participation in adult learning</b> Education and training is not a first priority for many immigrants Many immigrants with low levels of education cannot see the link between formal skills and the chance of getting a job Financial support during a training course Immigrants often get different messages from different authorities and bodies.
<b>Obstacles to getting a job</b> Low skills in the Swedish language Low levels of formal education/training skills Immigrants are not familiar with the conditions in and demands of the Swedish labour market.
<b>Obstacles to integration</b> Many immigrants are outsiders Immigrants lack experience of and contacts with the Swedish labour market Many immigrants do not participate in Swedish society.

The *Vocational Training Course for Immigrants* is a tool that allows immigrants to enhance their chances of getting a job and at the same time improve their competences by participating in language and vocational training programmes. In line with this, a training course started in 2005

aiming at creating jobs as janitors in their own housing areas, thus also creating better understanding between different ethnic groups of residents. The course was called *Job in the Residential Area*, JOIN, (“Arbete i närmiljö, AIN”). The course was a partnership project between the Municipality, represented by GLC and the Municipal Labour Market Unit, the Local Employment Office, and the employers (representatives of different housing companies). This initiative was preceded by similar courses in health care and house cleaning.

The training programme starts with outreach activities to find the participants, and then follows the Swedish principle in offering places to those who most need it, in this case meaning jobless immigrants. At this stage the future participant is informed about the course, its aims and how it is organised. After having been recruited to the training course an interview takes place with the counsellor. At this interview a negotiated individual study plan is produced. The next step will be another interview with a counsellor to analyse the participant’s prior competences and knowledge. Portfolio methods are often used in order to carry out an in-depth compilation of the person’s prior knowledge. When the applicant is accepted onto the training programme a provider is normally contacted. Any provider, private or public, can be used when arranging the training in order to create the best course both in terms of flexibility and customising it to individual needs.

Due to this structure, the individual is well informed and can make his or her own choices as to what training course he or she will choose and what arrangement would suit him or her best. The counsellor and the teachers are always at the student’s disposal, in this way following up the student’s progress and also being able to give advice and guidance.

During the preparatory course and the vocational training course the students can always discuss any issues with the teachers, the counsellors, and the assistant head of GLC. The fact that the course leaders/teachers are involved with the training course at the Lernia vocational centre means they can discover any problems affecting the participants as they come up.

After completion of the training course for janitors the coaching process starts. The course leader with a practical background is responsible for keeping in touch with the newly trained janitors in order to encourage and support them in their search for a job. In this process the Employment Office has the main responsibility for matching the immigrants to a job.

The course provider, Lernia, has very good contacts with working life and can subsequently be of considerable help in job search.

#### *Method used*

The study and vocational counsellors together with teachers are responsible for the delivery of the *Vocational Training Course for Immigrants: Job in the Residential Area* (JOIN). The most significant tools used for delivering the programme are the following:

- A partnership between the Municipality of Kristianstad, the Employment Office, and employers from the Housing Branch
- Co-financing between the Municipality, the Employment Office, and the European Social Fund
- An Individual Study Plan allows for the individual, in dialogue with counsellors and teachers, to make independent decisions as to the choice of on-the-job practice, and the set-up of the training course.

The implementation of the programme was divided into six main phases:

**PHASE I.** The beneficiaries of JOIN were identified through one of the following strategies:

a) In the case of subjects already enrolled in at the Employment Centre, the Guidance Counsellor conducts a first evaluation based upon the Individual Study Plan, in which training needs relative to skills needing to be learned or developed are highlighted. If the counsellor feels that JOIN could be the appropriate measure for individual training, he contacts the Employment Office to discuss a possible place on the course and the willingness of the Office is willing to let the applicant keep the unemployment benefit.

b) In the case of beneficiaries who autonomously apply for JOIN the application is considered together with the others and the rules and priorities for admission will be applied.

c) In the case of immigrants who have been recruited through an outreach activity by the course leader, these persons will be treated in the same way.

Most of the participants of JOIN were recruited by alternative c).

**PHASE II.** At the outset the learners and counsellors together draw up an Individual Study Plan (see the *Table 2* below “A model of the process as it is used today”). This process includes a compilation of the individual’s competences, on which the training programme (JOIN) is based. In addition any practical problems regarding study support, child-care matters, time-schedules etc are discussed and any possible adaptations are made to meet the individual’s needs. Individuals receive study and vocational guidance before applying for the training course. They are also offered the opportunity to validate any prior competence or knowledge (APL).

**PHASE III.** Forty participants were recruited with knowledge of Swedish at level C or D in *Swedish for Immigrants*. Out of these twenty people were selected for JOIN. The assistant head of GLC decided on the final admission to the course. This decision was made in dialogue with the applicants in order to find the best solution for him or her. This could also mean that the applicant withdraws his or her application.

*Priorities for admission*

1. The individual needs of the applicant
2. A low formal level of education
3. Unemployment
4. Personal suitability

**PHASE IV.** After Phase III the preparatory course starts. The course is managed by two teachers – one Swedish language teacher and one teacher with knowledge of the technical areas in question. These two teachers work together throughout the project. The aim is to improve the learners’ knowledge of Swedish and particularly the vocabulary concerning the vocational areas in question. The text book used is one with general texts from the vocational areas. During the course the language teacher wrote a text book for linguistically weak learners with pictures and an easy vocabulary. The course contains four different work experience periods and the students are at different workplaces during these periods. A steering group was created consisting of the teachers, representatives of the future employers, and representatives of the partners.

**PHASE V.** The vocational training programme was carried out by Lernia and it was funded by the Employment Agency. During this phase one of the teachers from the preparatory course – the one with a technical background – followed up the learners, giving them support and also being

the contact person in relation to the different workplaces involved. This phase lasted one year.

**PHASE VI.** The teachers coached the trainee janitors to prepare for and gain jobs in cooperation with their partners, the Employment Office and the course provider, Lernia.

*Solution adopted to the initial problem*

The project had several goals and objectives. The starting point was that the participants in the project must obtain a job and that they should achieve greater integration into Swedish society.

Three months after completion of their training, 75 % of the students had some form of employment. After one year 83 % (20) had a job and 8% (1) were studying. The rest were still unemployed (1).

Concerning the better integration aspect the evaluators said:

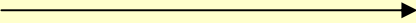
*“An important aspect of the project was to create conditions for greater integration into Swedish society. Integration is about meetings --- The course allowed the learners to create many new relationships. --- We note that through the project, students have created a better contact with Swedish society.--- On our question asking if they met any prejudice from Swedish people the students stated that this did not pose a problem. On the contrary, they said that Swedish customers showed interest and respect by asking who they were, where they came from, etc. When students reflected on this, they spoke about the way the project was delivered (trainers, project managers, teachers, etc.) as a good model which made it easier to enter and be accepted by society”.*

### Transferability

JOIN comprised a low number of learners. When the JOIN methodology has been used in other training courses the same results have been achieved but for a larger population.

Another objective of the project was to develop a method for language teaching for immigrants in collaboration with future employers and to develop preparatory vocational courses adapted to the Sfi (Swedish for Immigrants) curriculum.

Table 2 - A model of the process as it is used today

<b>Activities</b>	<b>Individual Study Plan</b>			
				
<b>Outreach activities</b>	<b>Step 1</b>	<b>Step 2</b>	<b>Step 3</b>	<b>Step 4</b>
		Mapping by Guidance Counsellors	Option - A brief pre-vocational assessment	Option - A validation of prior learning leading to a school certificate or a certificate relating to a vocational area
				Job and /or training
		↓	↓	↓
		E-portfolio/ Portfolio of Merits/CV	Job and /or training	Job and /or training
		↓		
		Job and /or training		
<b>Staff</b>		Study and Guidance Counsellors Assistant - Counsellor Coaches Responsible for training		
<b>Location</b>		The GLC distance learning centre (preparatory training, education and training, distance education, CVs, e-portfolios, Portfolios of Achievement) Municipal upper-secondary schools with vocational programmes (Brief pre-vocational assessment, validation/APL, training courses) Private enterprises (Brief pre-vocational assessment, validation/APL, training courses)		
<b>Comment</b>		Some steps may be omitted if a job or a training course place could be achieved without any form of validation.		



The key success factors relate to the fact that managers responded to immigrants' training needs in a flexible manner. All the stakeholders in fact responded to the need for changes in attitudes towards immigrants and for the creation of supportive conditions to allow for both getting a job and being better integrated. One of the main ideas underpinning JOIN lies in providing sound and realistic training based in the workplace, as expressed in the metaphor "if the map does not correspond to reality, then reality will win through." The course leaders had considerable freedom in choosing the most appropriate alternative and were not bound by formal regulations.

#### *Weak and strong aspects*

As the project met with considerable success, invitations came in to present the project at several conferences at national level. At the same time the textbook was finalised by the language teacher. 500 copies were printed, marketed, sold, and distributed to different educators.

Table 3 - Main findings

<b>Significant factors in JOIN giving access to work and raising employability:</b>
The steering group as the prolonged 'arm' linking the project and the labour market
The project leaders' and the workplace tutors' involvement in the project
Coaching for jobs – a person well established in the vocational profession supports and coaches the participants to participate in the labour market
A strengthened occupational identity and an increase of self-confidence
The creation of more meetings and contact points for the participants who could thus get to know the occupational area and also, from the integration aspect, more Swedish people
Language development - an improved ability to speak, write and understand Swedish
Long periods of work-experience at the same work place which gave the employers the opportunity to get to know the strengths and weaknesses of the trainee.
A higher level of vocational training with a formal certificate from the public school system
<b>Significant factors in JOIN for stimulating adults to lifelong learning:</b>
Clear goals for the training course
The course leaders' and the steering group's commitment to the most significant points and the core ideas of the project
Freedom in deciding on working methods – deliberately selected - and a flexible way of working
Swedish language tuition was very closely linked to the vocational teaching both in the periods of theory and the periods of work-experience
A bottom-up perspective was applied in the implementation of the project with the workplace tutors being very involved in the course as it progressed, and the learners also gradually becoming more involved
A good working atmosphere
Handpicked project leader and Swedish tutor who were very engaged and active not only in classroom activities, but also in the whole project.
GLC is a learning organisation with a developmental and goal oriented focus which means that the project was pervaded by process thinking: What has been good? What has gone wrong? What should we do about it?
The project leader and the Swedish language tutor had a holistic view of the project, and took overall responsibility for it, its participants and its outcomes
Coaching for jobs

<b>Strong aspects</b>	<b>Weak aspects</b>
Tailor-made individual training courses for participants	Not all applicants are selected to take part in the programme
Training programme individually agreed with the participants	
Workplace-based training, to be created freely by the course leader without regulations	
Further material (textbook) and sustainable actions result from JOIN	
Most participants of JOIN got employment after completing the programme	One participant is still unemployed
The main target, the improved integration in the Swedish society, is achieved	

#### *Sources*

[www.ac.lst.se/files/eOOOOoo5.pdf](http://www.ac.lst.se/files/eOOOOoo5.pdf)

On this website the County Administrative Board of Västerbotten presents 23 good examples of the integration of language teaching with work experience/work. JOIN is one of them.

[www.google.se/search?hl=sv&q=%22arbete+i+n%C3%A4rmlj%C3%B622+konferens&meta=](http://www.google.se/search?hl=sv&q=%22arbete+i+n%C3%A4rmlj%C3%B622+konferens&meta=)

The site reports on the final conference of the project in November 2006, in which the whole project was presented. Representatives of the Swedish Integration Board (currently the Swedish Migration Board) took part in the conference.

[www.iqpc.com/ShowEvent.aspx?id=108760&details=108778&langtype=1033#DayTwo](http://www.iqpc.com/ShowEvent.aspx?id=108760&details=108778&langtype=1033#DayTwo)

The programme for a national conference called SFI-forum (SFI=Swedish for Immigrants) in 2008. During the conference JOIN was described as a practical tool and an inspiring working method for high quality teaching of Swedish at all levels

[www.komvux.kristianstad.se/vlc/html/arbete\\_i\\_narmiljo.html](http://www.komvux.kristianstad.se/vlc/html/arbete_i_narmiljo.html)

This site presents an overview in Swedish of the project and a detailed description of the day-to-day progress of JOIN – the logbook

[www.kristianstad.se/sv/kristianstads-kommun/Utbildning/Vuxnas-larande/Vaglednings--och-larcentrum/SIA-Laromedeo/](http://www.kristianstad.se/sv/kristianstads-kommun/Utbildning/Vuxnas-larande/Vaglednings--och-larcentrum/SIA-Laromedeo/)

The text book written for the learners in JOIN by Marie Lundbladh, the teacher of

Swedish, is presented on the website of the Municipality of Kristianstad,. The book is a beginners' text book, concentrating on practical, technical occupational language.

[www.nordvux.net/object/17152/stegenutiaretet.htm](http://www.nordvux.net/object/17152/stegenutiaretet.htm)

This site contains an article written by an NVL journalist. NVL, the Nordic network for Adult Learning, is the operational unit for adult and lifelong learning of the Nordic Council of Ministers.

#### **4. INFORMATION, CAMPAIGNS, NETWORK AND PARTNERSHIP**

##### **4.1 The Netherlands, Stichting Lezen & Schrijven (Reading & Writing Foundation)**

by the German Institute for Adult Education Leibniz Centre for Lifelong Learning

###### *Problems faced*

The following Case Study is concerned with the combat of illiteracy in the Netherlands. Although, as one of the developed countries not being most stricken in terms of illiteracy among the population, the Netherlands has an estimated number of about 1.5 million people who lack reading and writing skills. In an overall population of about 16.500.000 people living in the Netherlands, one and a half million illiterates or people with insufficient reading and writing skills appears inacceptably high.

For this reason HRH Princess Laurentien of the Netherlands founded the Lezen & Schrijven foundation in the year 2004. The main purpose of the foundation is to launch campaigns that call attention to the illiteracy problem in the Netherlands, while at the same time encouraging persons concerned to reveal their problems, to face the challenges and to request help. It is assumed that illiteracy is a major taboo among the population and society that creates the reluctance to reveal reading and writing difficulties. Thus, in the first place, the Foundation aims to combat the concealment of illiteracy in the Netherlands and then, as a second step, to find ways and opportunities to actively tackle the problem of reducing illiteracy among the Dutch population.

The Lezen & Schrijven Foundation is applicable to be further described in form of a Case Study for the main objectives of the foundation are far beyond the simple aim to combat the illiteracy problem in the Netherlands. The decrease of illiteracy among the population is also of a great political and economic interest. Assuming that there are illiterates and workers with insufficient reading and writing skills among the Dutch labour force, it can be concluded that there are considerable human resources which are not employed to their full potential.

This means the existence of a hidden potential and competences among the working population in the Netherlands that could possibly become visible after the campaigns initiated by the foundation raise awareness of illiteracy issues, tackle low reading and writing skills, and break the taboo.

The foundation's promising approach is credited by the policy and the economic sector in the Netherlands with proving better qualified labour force and developing a more competitive country, politically and economically. Therefore, the foundation takes advantage of these interests and receives the financial support from both, the public institutions, representing the political interest and the economic sector in form of sponsoring from enterprises.

This example of a good practice in the field *information, campaigns, networking and partnership* and demonstratively shows how common interests can be recognized and promoted.

#### *Lessons learned and reasons that explain the relevance of the Good Practice*

Illiteracy presents a problem. This affects the world population, more strongly in the Third World, but also in Europe and not least also the population of the Netherlands.

At present, there are about 1.5 million people who do not have adequate reading and writing competences in the Netherlands. What is remarkable here is that the majority of these citizens do not – as may be supposed – have a migration background or are not exclusively immigrants with little foreign language knowledge. Two thirds, so about one million people with inadequate reading and writing skills, have been born and brought up in the Netherlands and have been through the complete schooling system. Out of these 1.5 million with low reading and writing competences, there are then about 250,000 functional illiterates which means that individual words can perhaps be understood or even written, but these people are not capable of understanding or writing longer texts in an everyday context at all.

These numbers show that, in the Netherlands too, illiteracy can be addressed as a special problem. In 2004, HRH Princess Laurentien of the Netherlands took this problem on and created the Lezen & Schrijven Foundation in order to activate supporters and benefactors to develop awareness among the wider public for the fight against illiteracy, and to create the appropriate structures to prevent and reduce illiteracy and weaknesses in reading and writing.

Since May 2004, the Lezen & Schrijven Foundation has been canvassing for sponsors, getting campaigns off the ground and promoting projects that actively contribute to the fight against and prevention of illiteracy.

Illiteracy affects all levels of a society. Men and women, the employed and unemployed and young and old are affected equally. Without the ability to read and write, members of a modern society are restricted as far as their scope of action is concerned.

Nevertheless, a great deal of shame prevails and the issue of illiteracy is treated as taboo, in particular in the "developed countries". This often prevents the issue from being dealt with openly, and deters those affected from seeking help and revealing their problem or admitting to it in public. The fear of being left alone with their difficulties plays a large role among those affected: a phenomenon that is not least to be traced back to the fact that no particular attention is given to the problem of illiteracy in the political and the public sphere, nor is it discussed openly and it is even partially ignored.

It was HRH Princess Laurentien's intention to change this situation when she created the Lezen & Schrijven Foundation in 2004. One of the essential goals is to create a wide awareness and appropriate solutions to the problem of illiteracy in society by the year 2010, through publicity by the foundation.

However, creating any kind of awareness of the problem needs a sophisticated strategy to resolve a truly complex situation which begins as early as the primary level where, already in the Netherlands, 10% of eight-year olds do not show any better performance in the area of reading and writing than the average six-year olds before beginning school. In the sector of vocational training, the situation is that 7% of 16 to 19-year olds have only low reading and writing competences. About 80% of vocational training teachers rate the reading and writing skills of their students as too low for working life. Finally, it should be noted for the adult population, that one out of fifteen workers has great difficulties with reading and writing, and in any case, 10% of the population of the Netherlands have the lowest level of reading and writing skills.

It is the Foundation's goal to confront this situation with structural solution strategies. The Foundation was created in 2004 by HRH Princess Laurentien – at the beginning certainly out of a very personal interest – in order to devote greater attention to this issue in the future. The intention here is especially to address the private and public sector and to link these.

Employers from the private economic sector as well as public institutions should be given the chance to obtain grants through the Foundation with which projects for the prevention or reduction of illiteracy can be realized.

In order to implement such a strategy, it is necessary to inform, activate and convince appropriate benefactors to support the Foundation with funds. HRH Princess Laurentien puts in the relevant promotional work for this and spurs on the campaign through talks and contributions in the political field. The Foundation now counts IBM Nederland N.V., TNT N.V., De Nederlandsche Bank and KLM as its sponsors among others, but also ministries such as the Ministry for Work and Social Issues.

Increasingly, the issue of illiteracy is also being discussed internationally, whereby the Foundation – especially through its representative, HRH Princess Laurentien – is entering the international, political discussion ever more. So, for instance, the issue of illiteracy was made the theme of a symposium in the White House as well as being taken up as the topic of a UNESCO conference. HRH Princess Laurentien is the main speaker at each of these events and underlines again the importance of dealing with the issue of illiteracy and fighting and reducing it for the long term with appropriate measures worldwide.

Driver of these considerations is the message of the Lisbon Agenda of the European Commission in the year 2000 which states that Europe should have developed to become the most competitive and dynamic knowledge-driven economic area in the world by 2010. Fast-paced development such as this includes phenomena such as digitalization, globalization and individualization that go together with modern society. In the context of these characteristics of social communication and information systems, a number of competences will be required of the members of the society. Here, the ability to read and write fluently counts as one of the absolute basic requirements in order to guarantee active participation in the life of society. The number of employable members of the population of the Netherlands with weak reading and writing competences, still is today 2.5 million, shows that a large portion of citizens of the Netherlands, an EU Member State, are still not prepared for these ambitious plans.

The developments that are aimed at a modern competitive Europe also bring with them reorganisation, in companies, in the economy and in production ultimately, which means that, for workers too, down to the lowest level of difficulty of the assignment area, requirements will change and increase in the area of reading and writing. In view of the already mentioned high number of the working population in the Netherlands who



are lacking these very competences in adequate measure, it is necessary to catch up where the Netherlands has lagged behind and to increase the chances of each individual for complete participation in society, as well as to open up the possibility for companies to access the full human resources capital. A reduction of illiteracy, or rather an increase in the reading and writing competence in a society also leads to potential economic growth in the long term alongside increased development possibilities for individuals.

In this way, not only education and social policy, but also economic policy goals have been formulated by the Lezen & Schrijven Foundation.

#### *Method used*

The first step of the Foundation is to gain the attention of not-for-profit organisations as well as private companies and to direct them towards the problem of illiteracy. Practical projects that deal with the topic are implemented together with the Foundation. The projects all have the goal of directly or indirectly reaching the target group of people with weak reading and writing skills. In the end, this approach should have the effect of making people with weak reading and writing skills, first of all, recognize their difficulties, and finally be able to dispel their inhibitions and feel encouraged to actively improve their inadequate skills in this area.

Furthermore, an approach targeting a change in the treatment of illiteracy, which is characterized by shame and taboos, is followed, by aiming to achieve wide attention through continuous addressing of the issue in the political area and the media. This should extend out to all groups and areas such as companies and community centres as well the entire social and work environment of people with reading and spelling difficulties which should be drawn in.

Finally, companies, unions, communities and government organs too should commit themselves to develop solutions, in order to become active, together with suitable teaching, or specialized teaching institutions.

The Foundation has split its approach into the following essential steps for this strategy:

1. Offensive.
2. Communication.
3. Market place.

The course of action follows the logical strategy of first bringing attention to the problem, then jolting some awareness into it, and then, further, looking for debate and exchange on the problem of illiteracy. The first two steps happen mainly through publicity in any form and through any media channels. In the third step then, activity from the outside has to come in and partners have to be recruited and involved. In order to implement the concepts that have been developed, funds have to be invested and partnerships have to be formed.

#### *Solution adopted to the initial problem*

For a well-elaborated strategy, target groups have now been defined by the Foundation, made up of the following:

- companies
- young people
- parents
- education and training institutions
- adults with reading and writing difficulties
- the whole society in relation to information and clarification as regards the issue of illiteracy or targeted educational offers for reading and writing

A part of the strategy of the Foundation is to promote preventive measures. About 10% of 15-year olds in the Netherlands leave school without adequate reading and writing skills which is certainly an unacceptable degree of deficiency, but also means an increased need for prevention which has to begin already at school.

Alongside preventive measures, passive measures for the reduction of the extent of illiteracy and reading-writing weaknesses have to be carried out in those parts of the population in which there is already backwardness as far as reading and writing skills are concerned. Here, a decisive mission of the Foundation is to resolutely convey, by widely-applied publicity, the personal advantages for each individual of increased reading and writing skills, as well the economic benefit to be had through better qualified workers at every level.

A further focus of the work of Lezen en Schrijven is on participation. The aspect of participation in the sense of participation in social life, in the vocational and work world means, in particular, making information available to illiterate persons, in other words, people that cannot write and,

above all, cannot read. All websites, brochures and posters can, of course, only reach these groups of people if the ability to read fluently is not a prerequisite for comprehension. For this, the Foundation accordingly devises alternative means of communication together with expert organisations.

### *Transferability*

In order to show in a concrete manner the activities and projects with which the Lezen en Schrijven Foundation follows all these goals and intentions, which also demonstrates the transferability of the concepts, three examples of implementation are introduced below.

#### **The Talkr8! Project**

Starting from the assumption that many young people in the Netherlands already have difficulties with reading and writing at school (about every fifth secondary school pupil is not able to read their schoolbooks completely on their own), the Foundation wants to increase awareness regarding illiteracy and weaknesses in reading and writing at schools.

For this purpose, a number of basic educational language workshops under the label of Talkr8! are being especially developed for job preparation schools (VMBO) in which the pupils are to, first of all, learn to have fun with language use and, finally, improve their language skills in motivating but also challenging settings.

The workshops take place at job preparation schools in cities and places all over the country, in Den Haag as well as in Amsterdam. The workshops include themes and methods such as, for example, making up comics and stories, hip-hop texts, creating discussion circles, press reports, writing articles etc. The job preparation schools decide individually which classes should best participate in which workshops.

Registration and presentation of the findings can take place on the project's own website at [www.talkr8.nl](http://www.talkr8.nl).

The main goals of the project are:

- to demonstrate to young people the importance of and better future perspectives available through competent language use.
- to convey to young people the fun and pleasure that language can bring.

- to sensitize schools to pay attention to language and language use and to put the promotion of reading and writing skills right at the top of their agenda.

Partners in the project are:

Kennisnet, various educational advisory bodies, Purmerendse Scholengemeenschap, location W.J. Bladergroen, Christelijk Lyceum Delft, location Hof van Delft and Van der Capellen Scholengemeenschap in Zwolle.

The pilot project started in May 2006 in Delft and, since September 2006, Talkr8! is running at a national level in job preparation schools all over the Netherlands.

#### **The AtoZ Forum**

The AtoZ Forum is an independent, informal virtual platform on which the AtoZ agenda is publicized every year, in which exclusively issues and events related to illiteracy are taken up. The Forum is made up of 28 people from different disciplines and occupational fields that, however, all hold leading positions. This composition of the Forum's members supports the necessary diversity of groups and fields that have to deal with the problem of illiteracy together in an integral manner.

The Chairman of the Forum is the author, Frits van Oostrom, who discusses and decides on concepts and proposals on how illiteracy can and must be fought in the future, together with members such as, for example, Louise Fresco, Professor for Sustainable Development from the International Perspective at the University of Amsterdam; Paul Witteman, journalist; Paul van Loon, children's books writer; Yvonne Jaspers, TV presenter and Ed Nijpels, manager. The concepts and ideas generated by the Forum's members promise innovation and multi-facetedness through the obviously very different orientations and ways of thinking from which they stem. The results of the discussion forums are publicized regularly in an AtoZ Forum, Diary.

#### **The Leer lezen en schrijven Media Campaign**

The Leer lezen en schrijven (Learn to read and write) media campaign began in September 2006 on TV, the Internet and radio. The campaign spots aim to make it clear that everyone who has difficulties with reading and/or writing can definitely improve the quality of their life if they work on these proficiencies and improve them. So-called Literacy Ambassadors

(original title) play a role, reporting how much they have gained by learning to read and write or by improving their reading and writing skills. They all wear white T-shirts with only one letter printed on them. All the letters together make up the slogan of the campaign which roughly means "I can read better now!" or "I can write better now!"

Figure 1 - Media Campaign Poster



This national campaign is financed by the Ministry of Education, Culture and Science whereby more campaign users were already soon to be found. Parties, companies and local authorities use the campaign for their own communication of the issue. All TV and radio sequences are designed in a universal manner and are compatible and easy to integrate for any stations and formats.

The main goals of the media campaign are:

- to support cities and regions in drawing attention of a wider public to the problem of illiteracy .
- to support cities and regions in reducing the number of illiterates and citizens with low reading and writing skills in the long term.

Partners in the media campaign are:

Stichting Nedwerk NT1 and various Literacy Ambassadors of the respective Regional Learning Centres (original title).

The campaign began in September 2006 with Literacy Week and ran again in spring and autumn 2007.

### **Financing of the Foundation**

Alongside the examples of the Foundation's work already mentioned, the financing of these ambitious projects and campaigns of course plays a large role. The Foundation gets funds partly from public institutions, such as 48% of financing through subsidies from the Ministry of Social Affairs and Employment and the Ministry of Education, Culture and Science. The other half is financed through the private sector which means that companies act as benefactors to the Foundation, but also that individuals donate funds and support the Foundation in this way.

Every year, a plan of activities is generated by the Foundation for the Ministries, in which political goals regarding improvement of the employability of the work force, the increase of the general standard of education or, also, economic goals, such as more productivity, are integrated. In the year 2005, the Foundation could already register an increase in costs which was, however, strictly linked to the actual projects and the costs related to these. 1.4% of income was used for organisational costs in 2005. The outgoings of the Foundation amounted to 1.8 million euros in 2005. For the coming years, a continuous growth in costs is estimated because of the increasing number of project activities which have come about through the high response to the Foundation's campaigns. This development is to be welcomed, but requires even more promotion and awareness raising on the part of the Foundation in the political and economic field in future, in order to convince and gain suitable sponsors.

### *Weak and strong aspects*

What should be mentioned as a general perspective with regard to the continued existence of the Foundation is that – according to a press communication of 10 September 2008 – HRH Princess Laurentien proclaimed that the Lezen en Schrijven Foundation would continue its activities in the coming years. With the creation of the AtoZ Forum in 2008, one or more aspects have been added to the quest and work of the Foundation.

Also, the fact that HRH Princess Laurentien was named as UNESCO Special Envoy for Literacy and Development points to further ongoing activities and consistent prospects for the Foundation.

In September 2009, Literacy Week, whose organisers include the Foundation, took place under the motto of 'Laten we open kaart spelen' (Let's speak out). These events and activities show that the work of the

Foundation definitely has sustainability and will become accessible to an ever wider public. Through many products, the Foundation makes an enduring effect of its work possible.

In this respect, the book, *Geheim* by Hijltje Vink was published among others that came about through cooperation with the Lezen en Schrijven Foundation. The book deals with the story of the young Pim who relates how he gets behind the secret of his mother who can neither read nor write. Through this discussion of the issue that proves how important an open treatment of the problem is, schoolchildren, in particular, are being sensitized. The book has been distributed to schools in the Netherlands free of charge and encourages the integration of the issue in school lessons.

Alongside these products and regular activities, the Foundation also cooperates with important personalities in science and research and acts as publisher of the Dormant Capital, A Study of the Knowledge Economy and Low Literacy Skills and the study, Low literacy at work, which deal with the reasons for illiteracy in the Netherlands and at a global level and the consequences in educational policy and the economy. Parts of the texts have been put on the website and can be downloaded at <http://www.lezenenschrijven.nl/en/what-we-say/publications/>.

In conclusion, it can be noted that the Foundation demonstrates a prerequisite condition for a sustainable effect as regards its work through its commitment and awareness raising by campaigns, products and projects. In the coming years, it can be assumed that - according to the evaluation of the predicted impact - the continued work of the Foundation in its present form would possibly enable it to come nearer to the envisaged goals.

<b>Strong aspects</b>	<b>Weak aspects</b>
Beneficial conditions to promote a campaign due to a popular founder and well known financiers	
Promotional campaigns work on different levels and via various media	
High response to the foundation's campaigns, growing activity	Raising costs and ongoing need to search for more suitable donors
Continuous follow-up of the foundation's work over the coming years	Contingent existence of the foundation in the long-term perspective

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## **4.2 United Kingdom, Information campaign/Adult Learners Week**

by Richard Spear

### *Problems faced*

The problem addressed by Adult Learners' Week (ALW) is the low level of participation in learning, particularly from adults in lower socio-economic groups, the unemployed and older age groups. As a consequence each May, the National Institute of Adult Continuing Education (NIACE) co-ordinates Adult Learners' Week, across England and Wales - the UK's largest celebration of learning, and one of the country's largest "not for profit" campaigns.

Launched in 1992, the purpose of Adult Learners' Week campaign is to encourage more adults, particularly those who have low levels of participation in continuing education, to engage in better quality learning of all kinds. The campaign is intended to raise demand for learning and skills, to extend employment opportunities and to support the Skills Strategy more widely - particularly in the context of the UK's commitment to the Lisbon Goals - to make Europe the most competitive and dynamic knowledge-based economy in the world and a socially inclusive community.

### *Lessons learned and reasons that explain the relevance of the Good Practice*

ALW in the UK provides a framework for celebrating and promoting adult learning opportunities by mobilising the regional and local networks of hundreds of learning providers and community organisations who organise special events, advice and free taster classes to engage new learners. This is supported by the national co-ordination of publicity (television, radio, and press), poster campaigns, national awards to recognise achievement and national conferences or events to lobby politicians and policy makers.

The campaigns across the UK are paid for by a mix of European Social Fund and Government funding, together with sponsorship from the public or private sector.

In 2008, Adult Learners' Week in England and Wales attracted at least 64,000 people who participated in approximately 4,000 events.

### *Method used*

The coordination provided by NIACE ensures that national and local organisations have an infrastructure which they can use to promote and market learning opportunities to their target groups. The essential ingredient which contributes to the success of the campaign is NATIONAL promotion with LOCAL action.

#### *Key elements of the campaign*

- Local coordination through learning festival groups or regional coordinators;
- The development of a learner network to promote learning through word of mouth;
- Information and advice via television, radio and the press;
- Small grant funding for special events;
- Television and radio commercials;
- Thousands of free taster sessions and outreach workshops for the target groups;
- Promotion through job centres, shops, supermarkets, leisure centres, community groups;
- Web based briefings and information and advice;
- Free posters and campaign materials;
- Awards to celebrate the achievements of adult learners;
- A public relations campaign to promote the stories of adult learners;
- Focus days to target participants and to link to key policy areas;
- Learning Promotion Grants to support local first step learning activity;
- A survey on adult participation in learning.

### *Solution adopted to the initial problem*

ALW was originally launched in 1992 with the BBC, ITV and Channel, as major partners to provide a major media led promotion of adult learning opportunities and “Second Chance” learning. The campaign combined local event activity with numerous short films and news items on all the major terrestrial television stations, supported by a free helpline service to provide advice, information and guidance.

Over seventeen years the campaign has adapted to changes in technology and media delivery – it has also lived through changes in public policy and

different government strategies. However the core aims remain broadly the same – to support the development of a “culture” of lifelong learning and to raise demand for learning from those least likely to consider participation.

### *Transferability*

Working within the network of the EAEA (European Association for the Education of Adults) and through UNESCO, NIACE has been active in sharing the methodology and good practice associated with the campaign. An International Adult Learners’ Week is now promoted through UNESCO and nearly 50 countries across the World coordinate their own Adult Learners’ Week initiatives. For such a large scale campaign to be successful it is necessary to have: free resources, grants and a network of local planning meetings to support the delivery of thousands of free events in communities across the UK. NIACE has been active in supporting the development of local partnerships to plan and deliver local events. This has been achieved by facilitating meetings, providing toolkits and training materials and enabling good practice to be shared across counties or regions.

### *Weak and strong aspects*

The figures provided by “Adult Learners’ Week – Evaluation Reports” from 2007 show both an increasing in attracting adults to learn, but a lot of efforts should be made to reach those least likely to participate. For example, just under a quarter (22%) of respondents heard about the event they attended through a learning establishment and about one in eight (12%) heard through a leaflet or flyer. Motivation for attending is another important aspect. People attended events for different reasons and for more than half (55%) the reason was leisure interest. A noticeably low (4%) proportion of respondents were trying to enhance their job prospects.

ALW has many more strong points, as ALW is a strong brand name. Four in five (80%) respondents were aware that the event they attended was part of a campaign called Adult Learners’ Week. Taking action is another important dimension and the survey shows that three in five (60%) respondents have taken some form of positive action since the event. This includes two in five (40%) who have signed up, or attempted to sign up, for a course. The respondent profile shows a significant increase in new

learners: three in five (60%) respondents had a background of little or no learning in the last three years and a relatively high proportion (22%) of respondents had a disability. Of particular importance is that approximately half (46%) of respondents are working towards a recognised certificate or award. The greatest success of the campaign is the increase in adults from hard-to-reach groups becoming involved in Adult Learners' Week.

### *Description of the case study*

#### *Background*

NIACE's 2009 annual survey of adult participation in learning of all kinds shows a sharply widening gap between the educationally privileged and the educationally excluded.

Although the survey shows that the proportion of adults currently learning, or having done so in the last three years, has risen by one per cent from 38 per cent in 2008 to 39 per cent in 2009 - the proportion of adults currently learning in the UK - 18 per cent - is at its lowest level since the Labour government was elected in 1997.

The widening learning divide is illustrated by the following findings:

- ABC1s are at least twice as likely to be currently learning than those in the poorest groups, DEs (25 per cent ABs and 23 per cent C1s are currently learning, compared with 11 per cent of DEs);
- current or recent participation by DEs has fallen to a 10-year low at 24 per cent, compared with 53 per cent for ABs;
- 20 per cent of ABs say they have done no learning since school, compared with 55 per cent of DEs;
- current or recent participation by C2s has fallen back to 33 per cent - the level reported before 1997
- people in full-time (47 per cent) and part-time (49 per cent) work are more likely to be learning than unemployed people (40 per cent), those not in paid employment (27 per cent) or retired people (16 per cent);
- the older you are the less likely you are to take part in learning, adults aged 20-24 (61 per cent) are almost twice as likely as those aged 55-64 (31 per cent), and more than three times as likely as adults aged 65-74 (18 per cent);
- adults with no Internet access are three times less likely to take part in learning (just six per cent reporting current participation) than adults with any Internet access (22 per cent currently learning).

*Table 1 – Social Grade Classification*

<b>Grade</b>	<b>Status</b>	<b>Occupation</b>
A	Upper Middle Class	Higher managerial, administrative or professional
B	Middle Class	Intermediate managerial, administrative or professional
C1	Lower Middle Class	Supervisory or clerical, junior managerial, administrative or professional
C2	Skilled Working Class	Skilled manual workers
D	Working Class	Semi and unskilled manual workers
E	Those At Lowest Level Of Subsistence	Casual or lowest grade workers, pensioners and others who rely on the state for their income

In Wales the challenges are broadly the same however Wales has the joint third highest inactivity rate in the UK after Northern Ireland and London and level with the North East of England. The major difference between Wales and the rest of the UK is the percentage of people inactive through long-term limiting illness.

This is particularly the case for those aged 50 and over.

Wales has an ageing population. By 2020, the retirement age population is expected to have increased by 13.4 percent. Engagement in lifelong learning can make a significant contribution to active and successful ageing, with particular economic, health and well-being benefits. Despite this, between 2003 and 2007 participation in learning amongst those over 65 has decreased by 12.5 percent.

Basic skills needs remain a challenge - 440,000 adults in Wales do not have Level 1 literacy skills and 990,000 do not have Level 1 numeracy.

### *Description of the solution*

When Adult Learners' Week was launched in the UK in 1992 it was at the heart of a major drive to use the media to increase participation in learning, to signpost the public to information and advice and to influence politicians and policy makers on the need for more public investment.

Adult Learners' Week was originally launched (1992) with the BBC, ITV and Channel 4 - as major partners - to provide a major media led promotion of adult learning opportunities and "Second Chance" learning. The campaign combined local event activity with numerous short films and news items on all the major terrestrial television stations, supported by a free helpline service to provide advice, information and guidance.

Over seventeen years the campaign has adapted to changes in technology and media delivery – it has also lived through changes in public policy and different government strategies. However the core aims remain broadly the same – to support the development of a "culture" of lifelong learning and to raise demand for learning from those least likely to consider participation.

Adult Learners' Week remains a multimedia campaign focused on creating hundreds of accessible, locally organised outreach events to encourage first steps back into learning and to provide better access to information and guidance.

### *Methodology*

Adult Learners' Week is co-ordinated across England and Wales by NIACE. NIACE is a national voluntary organisation – a registered charity, with a membership comprising of a range of national and local organisations with an interest in adult learning.

The co-ordination provided by NIACE ensures that national and local organisations have an infrastructure which they can use to promote and market learning opportunities to their target groups. The essential ingredient which contributes to the success of the campaign is NATIONAL promotion with LOCAL action.

Free resources, grants and a network of local planning meetings support the delivery of thousands of free events in communities across the UK. NIACE has been active in supporting the development of local partnerships to plan and deliver local events. This has been achieved by facilitating

meetings, providing toolkits and training materials and enabling good practice to be shared across counties or regions.

*Key elements of the campaign*

- Local co-ordination through learning festival groups or regional co-ordinators;
- The development of a learner network to promote learning through word of mouth;
- Information and advice via television, radio and the press;
- Small grant funding for special events;
- Television and radio commercials;
- Thousands of free taster sessions and outreach workshops for the target groups;
- Promotion through job centres, shops, supermarkets, leisure centres, community groups;
- Web based briefings and information and advice;
- Free posters and campaign materials;
- Awards to celebrate the achievements of adult learners;
- A public relations campaign to promote the stories of adult learners;
- Focus days to target participants and to link to key policy areas;
- Learning Promotion Grants to support local first step learning activity;
- A survey on adult participation in learning.

In Wales, the development of the Learning Festival Group partnerships has ensured that connections have been made between organisations with an interest in adult learning and skills development, ensuring that there is no duplication of activities and that information communicated to the target groups is consistent.

*Local Learning Festival Groups/Regional Co-ordinators*

Adult Learners' Week was conceived as a national campaign, with local action. NIACE's role in mobilising a network of local learning providers to deliver a "festival" of learning plays a key role in the success of the campaign. The campaign offers thousands of free activities – to make learning more accessible and to encourage more people to seek information and advice about returning to learn or developing their skills.

In Wales, NIACE Dysgu Cymru has invested staff time and resources in developing a network of 22 Learning Festival Groups in each local county.

Each Learning Festival Group is made up of a range of local organisations with an interest in adult learning (for example - community learning providers, colleges, universities, trade unions, museums, libraries).

Groups receive a planning grant (currently up to £2,500) and are encouraged to work together to co-ordinate a range of outreach activities for their communities. In addition, groups received free promotional materials such as banners, pop up stands, posters and t-shirts.

This development has had a major impact on the local development of Adult Learners' Week in Wales – there is a more “joined up” approach to promoting adult learning which has resulted in less confusion for the communities or individuals being targeted.

Organisations and individuals involved on the groups have been supported by NIACE Dysgu Cymru to build their marketing and promotional skills and many groups have continued to meet beyond the Adult Learners' Week campaign because of their value in contributing to the strategic planning and delivery of adult learning. Joint marketing materials have been developed, and groups have been able to access/bid for additional funding for local events. Adult Learning Inspections (ESTYN) have highly commended this approach to fostering local partnerships.

The impact of increased local co-ordination is evident in the numbers participating in local events and more robust evaluation and mapping of local activity: 20,282 people took part in events across Wales during Adult Learners' Week 2008 – this figure has continued to rise year on year – in 2005, 14,000 people took part.

#### *Learndirect*

A FREE to call helpline (*Learndirect*) is promoted on all campaign publicity – to provide a free call access to a learning adviser, with the opportunity for follow up guidance and careers advice.

When Adult Learners' Week was first launched in 1992 a temporary helpline service was put into operation by the Government for a two week period. The level of calls to the service (in excess of 100,000 calls) prompted the development of a permanent service.

#### *Learning Promotion Grant*

In Wales a Learning Promotion Grant fund has been developed by NIACE Dysgu Cymru to support the delivery of free “taster” activity, by local or community based organisations.

A budget of up to £40,000 is allocated with grants of up to £1,000 awarded to each successful event. Grants are used to support activities to



reach disadvantaged or excluded groups. Organisations delivering events are encouraged to make them free and accessible.

Specific target groups included; those who are economically inactive, the low paid/low skilled, women returners, adults with caring responsibilities, older people, ethnic groups, people with disabilities, those with low levels of basic or key skills.

#### *Local Events*

The calendar of local activities is sensitive to the practical needs of the target groups. Provision is located at a time and place that suits different groups and is accessible to all members of the community. Providers of local events were encouraged to consider access and other appropriate support for example crèche facilities and transport.

#### *Example;*

Charter Housing Association coordinated, “Cheap As Chips” – where Charter Tenants demonstrated their cookery skills to young people from disadvantaged groups in the Pill area of Newport. Participants came from Newport Action for Single Homeless, National Association for the Care and Resettlement of Offenders (NACRO), Newport Social Services After-Care, Sure Start and the Mental Health Charity, Pathways. The event broke down age-related barriers and race-related barriers. 37 people attended and 6 young people signed up for further learning.

In Flintshire, Taster Sessions were aimed at specific groups, including; Carers, The Stroke Association and Communities First areas. Up to 175 people attended activities.

The University of Glamorgan joined forces with Gwerin Housing in Newport to provide a day of tasters for a sheltered housing complex. The community had not previously accessed adult learning opportunities. 26 people attended and as a result of the event further courses and activities requested by the participants were organised.

#### *Inspire Awards*

Celebrating existing learners in all their diversity - to encourage new learners, has always been a vital ingredient of the campaign.

Campaign planning begins with a call for nominations for the Inspire Awards - on behalf of learners who have had a life changing experience

through learning. Hundreds of nominations are processed, with selection panels meeting across England and Wales to select regional and national award winners.

The stories of award winners are a key element in the public relations strategy and a way of engaging national and local media in the promotion of learning. The awards also attract additional sponsorship revenue. Awards are presented at national and local ceremonies – providing an opportunity to engage the support of celebrities and politicians.

Many award winners continue to feature within the campaign – through television and radio advertising, poster campaigns or as part of the Learners Network.

#### *Learners Network*

Alongside the campaign is a growing Network of Learners – who have either participated in campaign events or have received an Inspire Award through Adult Learners' Week. The network has been supported to develop "Word of Mouth" promotion of campaign events and is consulted on the development of campaign activities

#### *Focus Days/Key Themes*

The campaign uses Focus Days and Themes to highlight key policy areas or to target particular communities – A Cultural Diversity Weekend, Global Learning Day and Family Learning Day – are currently promoted with Adult Learners' Week.

In addition, **Learning @ Work Day** was introduced to Adult Learners' Week in 1997 – with the aim of including employers and trade unions in the campaign and to put a focus on learning skills for work.

As a result of this promotion a range of public and private enterprise now engages with the campaign and for many trade unions Learning @ Work Day is a feature of their marketing calendar enabling them to build on the Union Learning Rep initiative and to promote activities funded through the Union Learning Fund. A growing number of activities now take place in workplaces across England and Wales (in NHS Hospitals, in schools, small or medium employers, in charities or voluntary organisations and in larger national organisations or global organisations).

In 2008 in Wales at least 2,500 people took part in Learning @ Work Day events.

The 2008 evaluation of Learning @ Work Day indicated that 41% of respondents had little or no access to learning opportunities at work prior to attending the event. Kellogg's launched a "Skills Crunch" event at their site in Wrexham. The event marked the opening of new learning centre with free taster activities offered to all workers.

#### *Website & New media*

The campaign is supported by a Website – which contains information for the press, for event organisers and for the general public. The site has downloadable materials (posters, images, logos & toolkits), funding information, and a forum to share good practice and an electronic newsletter for the latest information. Events for Adult Learners' Week can be uploaded and searched on the site. The latest campaign developments have been in the use of You Tube to promote awareness.

#### *Results and impact analysis*

Adult Learners' Week has been monitored internally and by external consultants. Quantitative and qualitative data is collected by event organisers, regional project planning groups or Learning Festival Groups, the central staff team and external surveys, ensuring responses from both providers and participants. Event reports include participant views collected by the providers, numbers and types of events held, publicity distributed and networking conducted.

Some of the highlights of the campaign's achievements for 2008, across England and Wales:

- Just over 64,000 participants have been engaged in around 4,000 events organised as part of Adult Learners' Week by further education colleges, higher education institutions, adult & community learning organisations, business and voluntary sectors, unions and local government, etc.
- As a result of these events, around 15,000 people signed up to a course.
- Approximately 1.5 million items of publicity materials were produced and distributed by regional and local colleagues/ networks.
- The campaign helpline received around 25,000 calls during Adult Learners' Week.

- Adult Learners' Week received the equivalent of £5.2m of press coverage -had it been paid for advertising - during the project period.
- Supplements in major national newspapers, The Guardian and The Mirror have reached millions of people.
- 59% of participants/callers to the campaign helpline took on some action when questioned two months later (compared to 50% in 2004 to 57% in 2007).
- The Awards scheme received a total of 1500 nominations for the Adult Learners' Week awards, and awarded around 115 winners.
- The campaign website received 81,436 unique visits, including 773,504 page views and 2034 events posted on the on-line calendar.

#### *Detailed analysis*

In partnership with local outreach activity, the main call to action for the campaign was the promotion of a free phone national learning advice line, *Learndirect*. The *Learndirect* helpline collects data from callers during the campaign, including how they heard of *Learndirect*. The latter information provides immediate feedback on the impact of the media interventions and publicity distributions. For example, the number of calls to the *Learndirect* advice line mentioning Adult Learners' Week specifically rose from 4% in the week commencing 10th May 2008 to 36% during the Week itself (compared with 3% to 34% respectively in 2007). This amounted to around 7000 calls, peaking immediately after the media supplements commissioned in The Guardian and The Mirror.

A further survey was commissioned to contact a sample of callers in England, contacting *Learndirect* during the campaign. This took place approximately two months after the initial calls. For example, in July 2008 Central Office of Information (COI) was commissioned to survey a sample of 300 adults who called the national helpline during Adult Learners' Week. The profile of these participants was as follows: 35% male/65% female; 17% over 50 years old; 38% from minority ethnic communities; and of the 21% registered unemployed – 21% were made redundant from their last job and 19% had been unemployed for more than three year.

**75% said that Adult Learners' Week made them think seriously about the benefits of learning (74% in 2007), and 67% said that it reassured them that they were doing the right thing (57% in 2007). The COI survey has therefore highlighted the successful impact of the campaign, reflecting a steady increase in respondents' positive attitudes and outcomes.**

Subsequent actions or attitudes, after participation in Adult Learners' Week showed that in 2008 over 2/3 of all respondents had taken some action since calling the helpline with 87% having acted or intended to act as a result (83% in 2007). 59% enrolled in or applied to/enquired about courses within two months of Adult Learners' Week, and of these 42% enrolled in/started a course leading to a qualification.

A major external survey was commissioned from TNS in England and Strategic Marketing in Wales, - to contact a sample of participants in local activities for their views. Adult Learners' Week coordinators in the English regions and Learning Festival Groups in Wales, were contracted to collect data and evaluations from participants and organisers of particular groups of events. The survey was designed to explore how participants heard about the event they attended, their reaction to the event and any action taken as a result. This gives an indication of the impact and actions taken by the target audience as a result of the campaign and phoning the helpline.

Evaluation of Adult Learners' Week 2007 in Wales, suggested that 60% of participants in local events came from a background of little or no learning. 17% had no formal qualifications. 22% were disabled, 10% were looking after the home, 8% were unemployed, 4% were unemployed and claiming incapacity benefit. In 2008, 56% of respondents had very little or no learning experience before attending an event, 26% had no formal qualifications.

The independent evaluation of 2008 Adult Learners' Week in Wales also highlighted that 11,763 individuals, most of whom had a background of little or no learning, had taken positive action as a result of the campaign. In most instances, this would involve learners undertaking programmes and/or qualifications at one step above their previous level of qualifications.

Adult Learners' Week stands out as NIACE Dysgu Cymru's most effective campaign. The total number of participants has increased fourfold in six years.... 84 per cent of learning providers surveyed consider ALW to be an effective campaign. Learning Festivals are a positive development and are an indication of enthusiasm among practitioners and providers for year-round promotion of adult learning opportunities ([www.coi.gov.uk](http://www.coi.gov.uk)).

In England, 66% respondents to Adult Learners' Week spontaneously mentioned a way they have benefited from the campaign, stating that it

made education and training seem relevant, interesting and of benefit to them. (COI, 2008).

Increasingly, contact with Adult Learners' Week has successfully prompted action, predominantly enrolling in/applying for courses: currently 59% of surveyed respondents (COI, 2008).

*The impact of the project was also indicated by the level of free media support obtained through news coverage on television, radio and press articles, other than that arranged as part of the project. As noted above, if the combined editorial coverage in the national, regional or local press for Adult Learners' Week had been paid for it would have been worth over £5 million in advertising revenue in 2008.*

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## **5. GRANTS, LOANS AND FINANCIAL INCENTIVES**

### **5.1 Italy, Individual Credit Card for Training (ILA Card)**

by Giuseppe Leali

#### *Problems faced*

The problem which required the invoked introduction of the individual credit card for training is the low education levels of some categories of the population (i.e. in Tuscany some have been identified like unemployed men and women in job mobility or who have been made redundant, immigrants, transsexuals, etc.) who are neither in training nor in education.

The good practice is intended to overcome obstacles to access to education and to facilitate the development of ways back to work and the integration and personalization of training courses for the subjects involved.

The Italian experimentation has involved the following beneficiaries: atypical workers; unemployed men and women receiving redundancy or unemployment payments; women re-entering the workplace; immigrants; transsexuals. It also shows a particular effectiveness in helping those with a low level of education (less than EQF level 2) back into training.

It represents a model of policy transfer, in that it is based on the perfection of experiments with ILAs - Individual Learning Accounts -, in countries like England and The Netherlands. Following other European experiences, in Italy the experimentation started in the year 2005 by the initiative of the Region Tuscany, limited to the Provinces of Arezzo, Grosseto, Livorno and Pistoia.

Such a measure has shown the capacity to activate 3,042 learners (from December 2006 to June 2008) divided as follows:

- 1,508 (from December 2006 to December 2007 in the Region Tuscany);
- 769 (from December 2007 to June 2008 in the Region Tuscany).

The per capita cost of financing granted came to €2,416.99.

The practice was originally intended to break down barriers to entry into education, in particular for workers with low levels of education, at risk of exclusion from the job market, with atypical contracts or receiving redundancy payments, as well as immigrants, women, and school-age youth having left formal education prematurely.

This measure was taken following the introduction of active policies regarding work and measures intended to oblige the unemployed and holders of atypical work contracts to enter education programmes (Legislative Decree 276/2003). Moreover, starting 2000, the Italian State adopted a provision that made it obligatory for Employment Services to provide their own users with a “proposal of adherence to initiatives of entry to employment or training or professional requalification or other measure that facilitates professional integration” (Legislative Decree 181/2000 art. 3).

This obligation provides that:

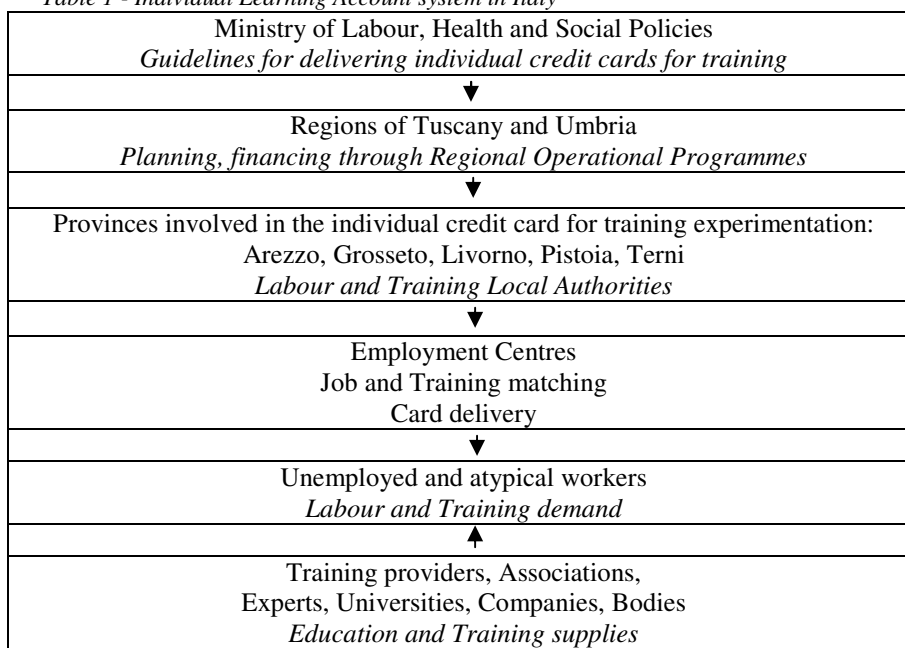
- 1) in the case of adolescents, young people and women seeking to re-enter the workplace, the adherence proposal be carried out no later than four months from the start of unemployment;
- 2) in regard to others at risk of long-term unemployment, no later than six months from the start of unemployment (Legislative Decree 297/2002, art. 4).

Such a measure was introduced on the initiative of the Region Tuscany.

In Italy the regional Governments have legislative power in some matters, among which are labour policies and, in particular, the regulation and the management of Employment Services. At the same time, in Italy the Regions manage the European Social Fund and it is, in fact, via this resource that this measure has been, and currently is, financed. The Region Tuscany delegated the carrying out of related interventions to the Provincial Governments, on which depend the Employment Services. The Provincial Governments, via the Council Departments for Employment and Education, adopt a *resolution* from the Provincial Council with which the targets for use are determined and the modalities of management of the Individual Credit Cards for Training are approved.



Table 1 - Individual Learning Account system in Italy



Source: "Carta di Credito Formativo Individuale. La sperimentazione italiana dell'ILA. Vademecum, available at [http://bancadati.italialavoro.it/BDD\\_WEB/bdd/publishcontents/bin/C\\_21\\_Strumento\\_5324\\_documenti\\_itemName\\_0\\_documento.pdf](http://bancadati.italialavoro.it/BDD_WEB/bdd/publishcontents/bin/C_21_Strumento_5324_documenti_itemName_0_documento.pdf)

In this context, the adoption of this good practice allows the Employment Services to offer interested parties an alternative measure to the offer of courses, which can be personalized and individualized, and are highly flexible.

At the same time, one must keep in mind a background characterized by a high percentage of unemployed youth: NEET-Not in Education, Employment and Training. Moreover, one should take into consideration the weight that some factors that form obstacles to the participation in education have in Italy and in terms of which the Individual Credit Card for Training may be effective:

Table 2 – Obstacles and current scenario

Obstacles to participation in training	The current scenario in Italy <sup>(*)</sup>
<i>Cost of training</i>	23.8% do not participate in courses due to high costs
<i>The places where training activities are carried out</i>	16.2% have difficulty in reaching and/or staying in the places where such activities are carried out
<i>Private and family obligations</i>	For 40.0%, training conflicts with family obligations
<i>Training seen as “going back to school”</i>	16.1% do not accept the idea of “going back to school”
<i>Training meeting actual needs and/or personal expectations</i>	20.1% of those who have attended at least one academic or training course do not think such activities are adequate to meet their needs and/or personal expectations

(\*) Data refer to the survey carried out in May 2006 and are related to the participation of adults (aged 18 and over) to education and training activities in the last 12 months before the interviews were taken. Source: ISTAT (2008), *La partecipazione degli adulti ad attività formative*, quoted in “*Carta di Credito Formativo Individuale. La sperimentazione italiana dell’ILA*”, Vademecum, available at [http://bancadati.italialavoro.it/BDD\\_WEB/bdd/publishcontents/bin/C\\_21\\_Strumento\\_5324\\_documenti\\_itemName\\_0\\_documento.pdf](http://bancadati.italialavoro.it/BDD_WEB/bdd/publishcontents/bin/C_21_Strumento_5324_documenti_itemName_0_documento.pdf)

*Lessons learned and reasons that explains the relevance of the Good Practice*

The relevance of the card is explained by the indicators and the *Table* below.

*Table 3 - Indicators and relevance of the individual credit card for training*

<b>Indicators</b>	<b>Reasons for relevance</b>
<i>Education and training costs</i>	The card is a financial support for recipients who can cover direct costs for training, partially or totally.
<i>Training location</i>	The card also covers indirect costs, including transport, subsistence and accommodation.
<i>Child care needs</i>	The card also covers indirect costs, including child care services
<i>Back to education and training</i>	The card promotes participation in non formal learning opportunities that have a different modality, approach and methodology compared to schools and educational institutions.
<i>Suitability of training to personal needs and/or expectations</i>	Recipients are offered a high flexibility in terms of education and training supplies and modules to be followed and are given the possibility to choose the ones that better meet their own needs and expectations.

*Method used*

The operators entrusted with the tasks of managing the Individual Credit Card for Training are the guidance practitioners of the Employment Centres.

The principal instruments used for managing the Card are the following:

- The Service Pact, which consists of an Agreement between the beneficiary and the Employment Centre representative;
- The Individual Action Plan, which consists of a document in which the training objectives to pursue are determined;

- The Training Project which identifies the training activities in which the participant takes part.

The process of realization of the programme may be divided into four main phases:

**PHASE I.** The beneficiaries of the Pre-paid Credit Card are identified via one of the guidance paths specified below:

a) In the case of those already enrolled in the Employment Centre who pass the first interview for signing the Service Pact, the Guidance Counsellor conducts a first evaluation based upon the Individual Action Plan, in which the training needs relative to skills to acquire or develop are highlighted. If the counsellor feels that the Pre-paid Credit Card could be the appropriate instrument for individual training, he proposes using it and illustrates the modalities of use, providing the individual with the form to fill out in planning his own Training Project.

b) In the case of beneficiaries who autonomously request the use of the Individual Credit Card for Training, they must come into the Employment Centre and initiate the procedure with a Declaration of Status of Unemployment, after which they may proceed to sign a Service Pact.

c) In the case of subjects who have already used the Individual Credit Card for Training, they must come into the Employment Centre to agree with the guidance counsellor the conditions for updating and restarting the Service Pact.

**PHASE II.** Based upon the Training Project planned by the client, the guidance counsellor verifies the coherence and the correspondence of the hypothetical training to the subject's requirements and starts to identify the obstacles to attending training activities, also noting how these could possibly be removed. In the case in which it is necessary to review the Individual Training Plan, he helps the client—upon request—to familiarize himself with the knowledge and skills necessary for the revision and the drawing up of the Plan. He illustrates the modalities of managing the Card and, having verified the validity of the training path, ascertains the motivation of the subject to commit himself to an activity which requires a good amount of personal autonomy. At the end of the interview, the counsellor writes a brief report and makes sure the following are filled out and signed:

1. request form;
2. informative note which he will send, together with the Training Project and the report, to the head of the Territorial Employment Office.

**PHASE III.** Pre-approval evaluation. The Territorial Employment Office sees to the pre-approval evaluation of each individual Training Plan. The evaluation procedure is drafted by a Commission comprised of the counsellors involved and the head of the Territorial Employment Office.

The evaluation criteria for the allocation of financing are the following:

*Quality of training path*

1. Adequacy of the training objectives.
2. Adequacy of the modalities of the allocation of the intervention.
3. Congruity of the length of time with respect to the objectives.
4. Congruity of the costs with respect to the length of time.

*Project coherence*

1. Correspondence with the training and professional experiences of the beneficiary.
3. Sustainability with respect to the autonomy/motivations of the beneficiary.
4. Adequacy of the intervention with respect to the final employment goals.

*Priorities*

1. Level of education.
2. Level of qualification/professional experience.
3. Seniority of unemployment up to 6 months.
4. Enrolment in the lists for unemployment or redundancy payments.
5. Gender.

**PHASE IV.** Following approval of the training project, the Employment Centre sees to:

- Setting up the transaction and arrangement of the deed of commitment of expenses (€2.500) + liquidation (€500).
- Emission of Order of payment to the Credit Institution with which the Province has stipulated an agreement.
- Intermediate interviews by the guidance counsellor with the beneficiary during the course of the project to verify the training path is being followed and to check justifications and admissibility of expenses.
- Emission of the Deed of liquidation for reloading the Card (€500) on the part of the Employment Service.

- Emission of Order of payment for reloading the Card on the part of the Provincial Accounting Office.
- Verifying the compliance of expenses generated and approval of expense statements on the part of the Province.
- Recovery of sums not spent via the Credit Institution.
- Restitution of sums erroneously used on the part of the beneficiaries.
- Forced recovery in extreme cases via the Province's Attorney General.

Monitoring and evaluation of the introduction of the Individual Credit Card for Training was begun in Italy in 2005 by the Ministry of Labour and Social Welfare.

A temporary Association of companies (consisting of Ernst & Young, Iter s.r.l., Sigla s.r.l. and Studio Come s.r.l.) had the task of carrying out the monitoring and evaluation activities that accompanied the experiment until April 30, 2008. The documents produced assemble the principal results coming out of the study whose queries were addressed to beneficiaries who concluded the training experiment financed by the Individual Credit Card for Training.

Monitoring and evaluation data are divided into two parts:

1. descriptive of the sample and of the demographic characteristics of the subjects interviewed;
2. more value-related, configured like a collection of judgments and information on the impacts produced.

#### *Solution adopted to the initial problem*

The Individual Credit Card for Training is a pre-paid credit card that allows the citizen to receive an economic contribution to cover, totally or in part, the costs of training. It allows, moreover, coverage of indirect costs (care of children or seniors or other) to facilitate access to training.

The Individual Credit Card for Training puts an amount of money corresponding to a maximum amount of €2,500 per person, per year, at the learners' disposal. This sum is credited via single reloads of €500 (for a maximum of 4 reloads). At the moment in which the allocated budget is exhausted, it is in fact possible to request additional credit in order to undertake new training activities.

This measure is aimed at:

- unemployed (pursuant to Legislative Decree 181/00) who have the right to access training courses intended to support re-entry to the workplace and to prevent the phenomena of unemployment of youth and long-term unemployment;
- unemployed immigrants for whom guidance actions are required, as well as training focused on basic and specialized skills and on companion services;
- unemployed over 45, with rights to personalized training paths to strengthen their skills;
- workers receiving unemployment or extraordinary redundancy payments on whom informative actions for guidance and training are focused;
- unemployed women entering or re-entering the workplace with particular attention to the need to reconcile “living” and working hours.

Beneficiaries of the ILA Card must in any case be adults<sup>36</sup> and residents of the Region.

This sum may be used for the participation in courses, modules or informal activities as per the individual’s requirements. It allows, moreover, for coverage of additional expenses for instructional materials, travel, food, lodging and other related items.

Requests for the card are made on the potential beneficiary’s personal initiative, or upon the invitation of an operator. The Territorial Employment Centres (CPIs – *Centri Territoriali per l’Impiego*) lay out the training path for the candidate, stipulating with him a Service Pact.

This Pact consists of an Agreement between the beneficiary and the representative of the Employment Centre. It determines objectives to be met and activities around which the individual training path is developed - which will be financed in this programme.

The Territorial Employment Centres have the important function of matching demand and supply of training, activating functions of guidance, mentoring and assistance during the phases of activation and granting of the credit card for training.

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<sup>36</sup> The age varies according to the Provinces where the Individual Credit Card for Training is adopted (i.e. in the Province of Grosseto it is for adults aged between 18 and 35, whilst in the Province of Arezzo it is for women with university degree or upper secondary diploma up to 40 years and for unemployed women aged over 40, regardless their education diploma).

The training Agencies, associations and every type of training organisation represent the subjects which offer training, implementing training actions ensuing from the granting of the card.

Within the Territorial Employment Centres (CPIs), the guidance practitioners carries out its own function of consulting via an guidance activity (at the first level), via the analysis of the individual's requirements, its own planning idea and the development of a goal to realize.

After the first level, having taken place via an interview, the beneficiary undergoes an additional interview with a guidance counsellor of the second level, which reviews a detailed definition of the project idea. It is also up to the operators to provide the client with a description of the usual procedure relating to the expenses and analysis and monitoring of the expenses generated by the user

Thanks to this modality of intervention centred on the individual, each beneficiary maintains his own autonomy in choosing and deciding which training activity to undertake, from the decision phase to the phase of entering into the actual activity or activities.

The complementary measure provided for is that of redundancy payments (*CIG - Cassa Integrazione Guadagni*).

### *Transferability*

Transferability can be considered from three different levels:

- *Political-strategic framework*: policy issues shall be taken into account when planning the experimentation of the individual credit card for training in a territory. Notably financial resources shall be identified that can fund the implementation and use of the card (i.e. European Social Fund, Axis and Objectives in the community financial planning).
- *Governance and organisational framework*: it supports the analysis of prerequisites and conditions for transferring the operational model of the card management. It would be important to deeply investigate on role and tasks of the Territorial Employment Centres, Provinces and Regional Governments.
- *Operational framework and organisation*: it is necessary for the analysis of competences and needs required for an efficient experimentation of the card.



### *Results and impact analysis*

As mentioned, the evaluation was carried out by a temporary association of companies, comprised of Ernst & Young (leader), Iter s.r.l., Sigla s.r.l. and Studio Come s.r.l. The sample used was made up of 2,248 subjects (compared to the total number of beneficiaries, quantified in the month of April 2008, which came to 3,042) and the study was launched in the month of September 2007 and concluded in May 2008. The findings show a population prevalently made up of Italian citizens (91.9%), with a low percentage of European citizens (3.8%) and non-EU citizens (4.3%).

The population that benefited from the card was overwhelmingly female (79.5%) and only 20.5% male.

The subdivision by age shows the following ranges:

- subjects between 26 and 35 years of age (48.1%) had the largest representation;
- subjects between 36 and 45 years of age (23.8%);
- subjects between 18 and 25 years of age (14.3%);
- subjects over 45 years of age (13.8%).

The education level of the beneficiaries shows the following distribution:

- primary school (0.5%);
- secondary school (19.6%);
- upper secondary school (44.5%);
- university degree (33.3%);
- graduate school specialization (2.1%).

The professional status of beneficiaries of the Credit Card for Training is comprised of:

- unemployed subjects 1,035 (46.1%);
- non-employed subjects 686 (30.6%);
- workers with atypical or temporary contracts 203 (9%);
- workers in other professional situations, or subjects not benefiting from a regular work contract nor receiving disability pensions 206 (9.2%);
- workers receiving unemployment or redundancy payments 115 (5.1%).

**Costs** were divided by province and include any financing allocated:

Province of Arezzo: €2,000,000.00 (50% regional funds - 50% provincial funds) to activate 800 cards.

Province of Pistoia: €2,000,000.00 (50% regional funds - 50% provincial funds). €150,000.00 (100% regional funds) for ILA transfer/activation of 800 cards + 50 (ILA transfer).

Province of Grosseto: €500,000.00 (100% provincial funds), refinancing of €202,500.00 (100% provincial funds) to activate 200 cards + 81 (refinancing).

Province of Livorno: €2,000,000.00 (50% regional funds - 50% provincial funds) to activate 800 cards.

The **average cost per card** was divided by Province and corresponds to the following amounts: Arezzo 1,135.18; Pistoia 1,013.30; Grosseto 1,512.76; Livorno 2,500.00.

The training projects could be comprised of more than one training activity, to attain the objectives planned with the beneficiary requesting the Individual Credit Card for Training. In fact the training activities undertaken are quantifiable: 4,009, with an average of 1.8 actions taken for each card.

The number of actions undertaken for each training project is shown as follows (in absolute values with regard to the sample used):

- 1 training action 1,276;
- 2 training actions 528;
- 3 training actions 260;
- 4 training actions 114;
- 5 training actions 33;
- 6 training actions 18;
- 7 training actions 5;
- 8 training actions 3;
- 9 training actions 3;
- 10 training actions 4;
- 11 training actions 1.

The sphere of training of the projects undertaken shows a notable preference, on the part of the beneficiaries, of three particular typologies.

The findings, expressed in percentage values, are divided as follows:

- intellectual/scientific professions 30.2%;
- technical professions 24.3%;
- professions defined as commercial activities and services 21.5%;
- office workers 16.7%;
- semi-skilled manual labourers 2.8%;
- artisans, specialized manual labourers and agricultural workers 2.7%;
- legislators, directors and entrepreneurs 1.1%;
- undefined professions 0.2%;

- no response 0.6%.

The typologies of training actions chosen by the beneficiaries are grouped in the formal sector (81%), compared to the informal sector (19%). The absolute values indicate that the number of training actions of the formal type are 3,276, while the training actions of the informal type come to 742.

The beneficiaries undertook specific types of training actions divided as follows (the values expressed are percentages):

- training courses 72.5%;
- individual consultation 9.5%;
- specialization courses 6.6%;
- seminars, conferences, workshops 4.3%;
- other training types 3.5%;
- higher education studies 2.4%;
- apprenticeships 1.2%.

The beneficiaries of the Individual Credit Card for Training had to undergo preliminary interviews with the guidance practitioners of the Employment Centres for the purpose of providing them with guidance and helping them build their own training path. From the findings on the number of interviews undergone by the beneficiaries the following data emerge (expressed in percentage terms):

- 2 interviews 31.6%;
- 3 interviews 30%;
- 1 interview 17.5%;
- 4 interviews 12.9%;
- 5 or more interviews 8%.

The motivation that drove the beneficiaries to request the Individual Credit Card for Training have been aggregated in two categories, improvement of professional skills and improvement of employability. 61.4% of the sample interviewed was motivated by the need to improve professional skills, while 38.6% expressed the need to improve their own employability.

The **Assessment of Occupational Impact** was conducted on a sample assembled in the period from December 2007 to February 2008.

Regarding the beneficiaries at the end of their training activities, 66% of them declared to have improved their own professional status, while 33% found their status unchanged.

Regarding the consideration, on the part of the beneficiaries, of improvement of their professional status, 67% found the training experience very useful, 31% quite useful, 2% not very useful and 1% not

useful at all. In reference to the category of persons who found the training experience very or quite useful, 47% of these attribute the cause to professional growth, 23% declared to have found work, 7% found it useful due to the financing received, and 4% were afforded the possibility to attain a qualification.

These data reveal that one part of the beneficiaries, already having an occupation, found an improvement in the sphere of work, and an improvement of knowledge and skills for those who were seeking a new job. 23% of the previous beneficiaries defined the training experience as useful because it was connected to a job search or a specialization capable of facilitating access to the job market.

The percentages regarding social development were small (3%) as were those related to the possibility, ensured by the Individual Credit Card for Training, of undertaking training activities abroad (2%). The analysis also highlights the fact that some 70% of the interviewed sample had already started looking for work at the time of their training experience. The beneficiaries declared, at the conclusion of the training experience, that they felt more motivated in seeking work, using diverse modalities as listed below (the values of the sample are listed in percentages):

- sending CV to employers 54%;
- seeking work via training/placement organisations 52%;
- networking/contacts 31%;
- competitions 11%.

The instruments that allowed beneficiaries to find a new or better job, compared to their previous occupation, showed the following conditions (values expressed in percentages):

- networking/contacts 62%;
- sending curricula to employers 31%;
- seeking work via training/placement organisations 8%;
- competitions 5%.

The **Assessment of Educational Impact** monitored the previous level of knowledge of the beneficiaries, with respect to the material studied during the training experience financed by the Individual Credit Card for Training. Here following are the relative values expressed in percentages:

- high 8%;
- moderate 36%;
- sufficient 30%;
- insufficient 15%;
- low 9%.

The evaluation carried out on the impact on knowledge and skills of the beneficiaries reveal the following data, expressed in percentage values:

- acquisition of new knowledge and skills 85%;
- updating of existing knowledge and skills 61%;
- development of knowledge and skills 55%;
- filling in previous gaps in knowledge 21%.

The experience provided by the Individual Credit Card for Training also produced results in terms of social impact on the part of the beneficiaries. The data reported below are in percentage values:

- personal growth 58% ;
- facilitating new knowledge 55%;
- confidence in self 45%;
- capability to communicate with others 45%;
- training approach 38%;
- attitude toward work 37%.

The general evaluation of the experience afforded by the Individual Credit Card for Training shows an ample percentage of satisfaction within the sample interviewed (71%). This finding is supported by the data relative to the possible tendency of the beneficiaries to undertake a training activity, even without the contribution offered by the Individual Credit Card for Training. 33% declared they would not undertake a training action, and 29% probably not.

Regarding the support received by the Employment Centres, 41% of the sample interviewed evaluated this as satisfactory, 23% excellent, 4% unsatisfactory, 5% insufficient.

The information channels via which the beneficiaries found out about the Individual Credit Card for Training were primarily the Employment Centres (46%), followed by word-of-mouth (39%), Internet (8%), training agencies (8%).

On this subject, the beneficiaries were asked to express a judgment with a value from 1 to 5 (1 being the minimum value and 5 the maximum) on the information provided by the Employment Centres, in regard to clarity, precision and quantity. The average finding shows an intermediate value of 3.05, indicating a uniformity of the judgment expressed.

The *Table* below shows a synthesis of the principal data collected during the assessment:

*Table 4 – Main findings*

MAIN FINDINGS	
32% of beneficiaries declared not to have ever undertaken the training activity financed by the ILA card, prior to activation of the card, for economic reasons.	The experience had strong training effects, both on the cognitive sphere of the subjects and on the social sphere.
For 66% of the beneficiaries their professional status, at the end of the term of the training experiment financed by the ILA card, was improved.	The training impact was high also for those beneficiaries whose professional status was not improved at the end of the training experience financed by the ILA card.
Of this 66%, almost all the sample (98%) defined the experience very or quite useful toward improving their professional status.	71% of beneficiaries considered themselves satisfied with the training experience in question and the percentage of “dissatisfied” was rather low.
Comparing these beneficiaries with those of comparable instruments, a higher percentage emerged of beneficiaries of instruments of financing of training, different from the ILA card, of which the professional status was unchanged at the end of the experience.	The principal criticisms identified were relative to the absence of adequate information and promotion of the card and to the bureaucratic procedures, long or complex and thus in some cases difficult to comprehend for some categories of users.
About 47% of the beneficiaries who found the training experience useful attributed the cause to professional growth.	The main strong points remained the economic assistance of the card and its accessibility to many.
The deadweight effect was quite small and not worrying.	The participants perceived a great added value in the support furnished by their respective Employment Centres.

#### *Weak and strong aspects*

The Italian model of the individual learning account practice has showed some weak as well as strong aspects. The former ones need a further reflection so that improvements and refinements might be provided. That is important in view to transferring the practice into other local contexts.

Weak and strong aspects are summarized in the *Table* below.

<b>Strong aspects</b>	<b>Weak aspects</b>
Strong responsibility of individuals during both the activation and the management of the card.	Hard and expensive instrument in terms of human resources needed. (at the very beginning of the implementation of the practice, in some Provinces few resources were available for the initial guidance and monitoring interviews. A proper human resources pool is needed by the administration that manages and delivers the practice).
Decisional and contractual power assigned to individuals.	Necessity of an appropriate and ad hoc monitoring system that accompanies all the steps for managing the card (in some cases a delay in activating and using the card occurred).
Training costs-sharing (training costs can be borne by recipients themselves and other additional actors, i.e. companies, social parties, public administration, etc.).	Inadequate and unsatisfactory personalization of training supply available on a territorial level (a relevant weak issue is related to the lack of flexible training supplies on a local level. This is because the card is addressed to a huge variety of users that has a huge variety of training needs. A more customized supply structured for different training needs and real demands of users might be needed accordingly).
Personalization of training actions (recipients have the possibility to build up their own training path in consideration of available supplies including formal and informal training opportunities. Choice is then made by participants according to their individual learning needs. That gives them the “contractual” power to decide also from the economic point of view. Competition among training providers is in theory fostered.	Complexity of bureaucratic and administrative management procedure (this is strictly related to the risk of frauds and implies that individuals bear some part of the management burden. It is then not very easy to monitor and control the level of public expenditure. Moreover that makes Employment Centres work heavier as most of the users do not possess the competences to report in details the expenses borne and are not autonomous in the overall training project management.

<b>Strong aspects</b>	<b>Weak aspects</b>
Targeted policies for specific target groups.	
Single management of direct and indirect training costs (thanks to its flexibility, the card allows recipients to bear indirect costs as well, i.e. childcare services costs, etc).	
Low number of frauds (during the first experimentation period 1,3% fraud has been detected).	
Training market re-balance (supply-driven training market tends to be a more demand-driven shaped on individual learning demands).	

#### *Sources and contacts*

Region Tuscany-[www.regione.toscana.it](http://www.regione.toscana.it)  
Settore Lavoro e Formazione Continua – Employment and Continuing Education Department  
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## **6. ACCESS TO AND USE OF ICT**

### **6.1 Spain, Aula Mentor**

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#### *Problems faced*

The Aula Mentor project started in the 90s, when the issue of how to meet the demand for training in the rural areas of Spain needed to be addressed, with particular concern for reaching individuals among small town populations who needed to upgrade employment and professional skills.

The project aims to provide distance learning but with updated and faster communication using internet tools. The problems the Aula Mentor project was intended to deal with were:

- Catering for people in rural and remote towns to enable them to study with tutor support.
- Addressing the needs of other sectors of the population, including those in urban areas, whose access to training is restricted by working hours or caring responsibilities for small children or elderly people. It seems likely that women in particular fall into this category.
- Resolving the issue of updating knowledge for those who, for various reasons, had not yet joined the world of vocational training and facilitating their entry into provision. Also to provide support to those sections of population needing to acquire basic skills to maintain or progress in their jobs, mainly by gaining knowledge of various software tools and office automation processes.

These problems were common throughout Spain, as in almost all the Spanish regions the situation was very similar.

The "*Aula Mentor*" (Mentor Classroom) is an open and distance learning system used primarily as a way of communicating through an electronic platform and website. It has been promoted since 1992 by the current Ministry of Education.

Aula Mentor courses are designed to provide additional training for students seeking professional development and enable them to study

aspects of culture such as literature, history, art, or undertake initial or specialist training in new technologies. This programme is targeted at groups who, for a variety of reasons, are unable to access training courses, for instance because they are in a rural setting with few or poor transport links, in hospital, in poor health, or in prison.

The overall group targeted by Mentor courses comprises the entire Castilian speaking society, including the population of Latin America. Differences in social groups are apparent from their choice of courses, i.e. specialist skills courses are chosen by students with a higher level of knowledge, e.g. PHP, MySQL, and those who have a background in computer science. Other courses such as 'Introduction to Computing' or 'Introduction to Office Skills' are selected by those who have a low level of knowledge or those seeking employment in administrative positions whose training is a little out of date.

During the 17 years that Aula Mentor has been in operation the number of students enrolled who have accessed accreditation has been very high. It is interesting to note that the key feature is not so much numbers but the social characteristics of the population in question.

At present the team coordinating the Aula Mentor at the central Ministry of Education, the Mentor Office, is composed of about 20 people from different professional and occupational backgrounds, including 6 new graduates who joined the team as a first step in their careers. The name of the department head is D. Joaquín González Gigoso, and his two closest associates are Ms Carmen Fernández Herráez and Ms. Sol Emilia Jiménez Alonso.

The website address from where information on current Mentor courses can be obtained and where students can enrol is <https://cve.mec.es/mentor/inicio.html/>.

### *Lessons learned and reasons that explains the relevance of the Good Practice*

In Aula Mentor distance learning and individualised timetables allow more disadvantaged sectors of the population to follow courses with a faculty specialist. This includes people in prison. The pilot was established in prisons, both in Spain and in Latin America, and the results have been very positive. Another sector of the population comprises immigrants who participate by completing a Spanish language course and taking the first

steps in the learning mentor programme in classrooms that are close to their home or within an association to which they may belong.

Furthermore, the cost-benefits ratio is good and as the cost of the course is very low (€24 per month) it is not beyond the economic means of those who need to update their skills and knowledge. This is an additional reason underpinning the relevance of the practice.

The data that follow show the results achieved between 2002 and 2008 period in relation to different age bands in the target group.

*Table 1 - Students enrolled (alumnos matriculados<sup>37</sup>) by age in 2002*

<b>Age bands</b>	<b>Number of students enrolled (alumnos matriculados)</b>
<i>16</i>	<i>101</i>
<i>16-25</i>	<i>3,550</i>
<i>26-45</i>	<i>8,870</i>
<i>46-65</i>	<i>1,573</i>
<i>&gt; 65</i>	<i>97</i>
<b><i>Total</i></b>	<b><i>14,191</i></b>

*Table 2 - Students enrolled by age in 2003*

<b>Age bands</b>	<b>Number of students enrolled (alumnos matriculados)</b>
<i>&lt;16</i>	<i>53</i>
<i>16-25</i>	<i>3,473</i>
<i>26-45</i>	<i>8,858</i>
<i>46-65</i>	<i>1,665</i>
<i>&gt; 65</i>	<i>104</i>
<b><i>Total</i></b>	<b><i>14,153</i></b>

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<sup>37</sup> *Alumnos matriculados* are at the beginning of their course and they differ from the “*alumnos activos*” who already started their learning process.

Table 3 - Students enrolled by age in 2004

Age bands	Number of students enrolled ( <i>alumnos matriculados</i> )
<16	59
16-25	4,315
26-45	10,127
46-65	1,990
> 65	138
<b>Total</b>	<b>16,629</b>

Table 4 - Students enrolled by age in 2005

Age bands	Number of students enrolled ( <i>alumnos matriculados</i> )
<16	66
16-25	4,784
26-45	11,117
46-65	2,260
> 65	142
<b>Total</b>	<b>18,369</b>

Table 5 - Students enrolled by age in 2006

Age bands	Number of students enrolled ( <i>alumnos matriculados</i> )
<16	65
16-25	5,406
26-45	11,964
46-65	2,516
> 65	191
<b>Total</b>	<b>20,142</b>

Table 6 - Students enrolled by age in 2007

Age bands	Number of students enrolled ( <i>alumnos matriculados</i> )
<16	105
16-25	4,736
26-45	12,331
46-65	2,805
> 65	211
<b>Total</b>	<b>20,188</b>

Table 7 - Students enrolled by age in 2008

Age bands	Number of students enrolled ( <i>alumnos matriculados</i> )
<16	223
16-25	4,670
26-45	11,236
46-65	2,847
> 65	214
<b>Total</b>	<b>19,190</b>

Aula Mentor emerged in 1992 when the same educational system was put in place throughout all Spanish territories. Subsequently, since the transfer of educational responsibilities to the various autonomous communities, the recognition of courses has become more complicated. Thus, in some educational authority areas courses are recognised as credits for teachers or for competitive entry exams but not in others.

From an economic perspective, the Ministry of Education spent a variable amount each year depending on activities. In recent years €125,000 has been given in aid to 25 municipalities or localities for starting or improving Mentor Classrooms. In addition, there is an investment of approximately €600,000 in development costs for new courses, training for tutors and administrators, and other costs including investing in software, website maintenance and improvements to computer systems. The wages of the Mentor Office staff working in the national Ministry of Education are not included in these figures.

In addition, through partnerships with other institutions, government or private associations, the Mentor project contributes funding for resources for courses that are considered appropriate.

Student course fees are used for the payment of tutors, and a small proportion goes towards coordination and maintenance of the classroom. Currently students pay a monthly fee of €24.

### *Method used*

There are several elements needed to implement the project, listed below with a brief explanation of each.

#### Software

A server capable of handling bulk data including, in many cases, very large files is located in the Ministry of Education in central Madrid. It is essential to ensure that the servers are kept running constantly at all hours of the day and that there are no failures in the transmission of files. As a service for which students pay, it carries a performance requirement. The system includes a powerful platform that hosts an internal messaging system and has the tools required to monitor both the student and the tutor in order to be aware at all times of the activities and practices that need to be developed. There have been changes in the system over the years that the Mentor programme has been in operation in respect of monitoring activities. The Ministry has now opted for a closed platform that it is developing internally. Although it recognises the advantages of using Moodle it has not yet made a final decision on this.

#### Classroom Administrators

These are chosen by governments or institutions involved in the project. For example, if a municipality of 5,000 inhabitants is interested in locating a Mentor Classroom in the library, the council will appoint the person or persons responsible for managing the classroom. Next the council gives the names and *curricula vitae* of these individuals to the national Mentor Office who will provide them with appropriate training. The process of training managers takes approximately 3 months. They need to know the project philosophy, understand the tools and a little of the contents of each course so that they can guide prospective students to enrol in a course. Managers are responsible for enrolment administration and organisation, and ensuring proper conduct of examinations that students have to pass to obtain relevant certificates.

### Mentor Tutors

These individuals are selected by the Mentor Office. Anyone interested in participating in the project, either as a mentor or as a creator of new courses, can click on the "Collaborations" tab on the website and send in their *curriculum vitae*. The Mentor Office has a database of all potential candidates and, when it identifies a need for new tutors for existing courses, or new courses to be provided, it does a search and contacts prospective tutors. Once potential mentors have been selected a tutor training phase begins. This training phase consists of two parts: first a general phase focusing on pedagogy and methodology, which explains the philosophy of the project, student and tutor responsibilities with regard to the software tools they will use. The second part of the training is related to the specific content for which he or she is to be responsible. Project staff make sure that each tutor's knowledge is absolutely suited to the course objectives. Once it is considered that the tutor is able to perform their brief well they can start receiving students from anywhere in the country. The priority selection criterion for mentors is that they are, or have been, teachers.

### Course content

As explained above, the courses are created or updated in the light of the needs that are identified in the population, whether professional or for personal and cultural development. For example, in the booming construction and estate agency sectors in Spain, a need was identified to train agents to provide potential buyers with basic information for buying property, as estate agencies were requiring staff to report on developments in construction of new homes and business premises. At the time the Mentor project contacted a team of teachers with different vocational training specialisms, who were commissioned to develop a 60-hour training course covering the knowledge that a prospective salesperson needs to have. With the decline in the demand for this type of work demand for courses also fell as students left those jobs.

Course tutors with falling student numbers can, if appropriate, become Mentor tutors for other courses. The authors of the course content can be course tutors themselves, which is very common when it comes to updating content (remember that course operating systems are continuously being replaced by updated ones) or the authors are selected from the database mentioned above and from the website 'contributors'. The method for the selection of authors is as follows: the author may send the Mentor Office an index of topics intended to develop the course and a teaching unit for the course, which is always the first section of the central part of the course.

That unit must include activities relevant to this type of course. The Mentor Office evaluates the quality of content, which often requires the use of external experts at the department, and also evaluates the expression, clarity in the presentation of concepts, exercises and interactive teaching methodology in general. If all these elements are considered correct and adequate, the author directs the development and adaptation of the course so that it is navigable, interactive and suited to the tools for the platform on which it will be hosted. Subsequently, the department's Mentor team launches the course at the Bureau of Labour and initiates the process of training for course mentors and coordinators.

#### Project dissemination

To date there has not been any advertising to promote the project or its outcomes. In general requests for the creation of new classrooms comes from organisations that know about the project or municipal educational administrations. Only once, around 2003, a story was broadcast on the Autónoma de Madrid television channel which stimulated a large number of calls about the project. However, taking into account its current infrastructure, the Ministry does not consider it appropriate to undertake a massive publicity campaign for the moment.

Among all the items that we have described, at the core of the methodology is an essential process of continuous training for all teams, mentors, coordinators, designers and materials by the Mentor Office team. Updating has to be done with regard to the contents of the courses themselves as well as the tools used for the development of Mentor courses.

One way of identifying the need to update and train tutors is through the use of an evaluation form filled in by students completing their course. When students take their test, which is the final step to certification, the centre administrator provides them with a form to assess the different parts of the course: content quality, assistance received from their supervisor, promptness of responses and assessment of the tools used. These individual evaluations are sent to the office where they are analysed for the Mentor project to specify the improvements to be carried out where appropriate.



### *Solution adopted to the initial problem*

As mentioned above, the two main objectives of the Mentor project were:

- to reach those people who do not have the opportunity to attend training and
- to ensure the availability of courses for continuous upskilling and for professional personal development needs.

The solution to the first objective is achieved by opening new Mentor Classrooms in different locations so that people can register and use a venue with computers and internet access. Furthermore, the increase in households connected to the internet in recent years has encouraged many of the students enrolled in these courses to study at home and therefore have much more flexible schedules. The mentoring system, with tutors supervising students' work at any time, whether in the workplace or at home, allows immediate feedback or correction of exercises when connected to the internet.

The second solution is achieved through constant awareness of new labour market requirements and the cooperation of teachers and professional experts in different fields who work part-time, with the Mentor project. Pedagogical supervision and the adequacy of the methodology is the responsibility of the national Mentor Office.

In both cases there are many people involved in the development of the solution. In the first case, municipalities, autonomous communities or NGOs, are taking the initiative to open new classes or extend existing ones. The course tutors continuously train and update their knowledge to meet the demands of their students. Administrators manage venues and cater for prospective students who come to the school to seek advice and also ensure that the equipment meets all the requirements of the project's development objectives. Finally, staff in the national Mentor Office coordinate, supervise and collaborate in the overall operation.

The people involved in addressing the second objective are too numerous to mention. Sometimes it is the course tutors themselves who warn of the need to expand or upgrade courses. In other cases, teachers outside the Mentor project, but who are linked to the world of education and vocational training, alert the project of the need to include a new course to complete a training qualification via its website. On other occasions, the needs are identified by the Ministry itself as new provisions in respect of qualifications or obtaining official certificates are introduced. Once a need is identified, the next step is to find a team that can produce content within

the specific methodology used in the Mentor programme and in a set timescale. After the selected team has developed the course content, it is reviewed by other experts who assess the suitability and originality of the content. Finally, members of the national Mentor Office are responsible for checking the suitability of the methodology and its compatibility with the platform used.

### *Transferability*

Transferability of the Mentor project can be considered from the standpoint of *financing* and *profitability*. A difference must be taken into consideration when looking at the Mentor project implemented in urban and in rural areas.

In urban areas such as Madrid and other cities, even with a lower number of students per classroom, costs incurred are clearly competitive.

But in rural areas with low population density, profitability is clearly negative. In this regard it is important to underline the desirability of providing for rural contexts.

This observation is borne out by the data on the number of students enrolled during 2008 in classes that are located in towns with a population of less than 10,000 (which may be considered as rural regions) and distributed throughout the autonomous communities of Spain.

*Table 8 - Number of students enrolled during 2008 in towns with less than 10,000 people*

ANDALUSIA	343
ARAGON	2,369
ASTURIAS	794
CANARIAS	285
CANTABRIA	393
CASTILLE LA MANCHA	315
CASTILLA-LEON	2,601
CATALONIA	146
BASQUE COUNTRY	3
GALICIA	341
BALEARIC ISLES	17
RIOJA	432
MADRID	199
MURCIA	741
NAVARRA	56
VALENCIA	256
<b>Total</b>	<b>9,291</b>

Aragon and Castilla Leon appear to serve their rural communities better because of the way the population centres are distributed in both communities as well as their involvement since the inception of the project.

In communities such as Catalonia, the Basque Country, Balearic and Canary Islands, the Mentor project is more recent and therefore the student enrolments in these rural areas are lower.

Transferability might concern also the adoption of the Mentor project within prisons due to the success of it in these places in terms of training demands from inmates matched by the Mentor Classrooms. In Spain in the 90s, before responsibility for education and correction was transferred to the autonomous communities, a Mentor Classroom was opened in Carabanchel jail, Madrid. Then a training manager was appointed from Mentor's own classroom prison officials, whose role was not so much as a guide to prospective students, but to monitor and manage project tools/resources.

The next step was to open a Mentor Classroom in Soto del Real prison, Madrid, which continues to appoint its own prison officials. In parallel, another classroom was opened in Ocaña prison (Toledo).

Another initiative in this field was the opening of a Mentor Classroom in Asuncion prison, Paraguay, which still remains open and is managed autonomously by the country's own supervisors and administrators.

Following the transfer of responsibility for education to the autonomous communities, Soto del Real and Ocaña prisons continued to operate without any negative affects.

Safety measures have been implemented in each of the prisons where supervisors responsible for keeping track of the students are connected through a modem and use pseudonyms.

In prisons that are not offering any courses at present this may be because their inmates do not fit the profile, or the courses require specific software that would require each school to acquire a license.

Adopting the Mentor project in additional prisons (in Spain and abroad) would imply the need to reach agreement among various parties to create a simple process to include all those prisons who want to join the programme. The institutional parties to be involved would have to commit themselves to take over the programme, pinpoint tasks and respective responsibilities, for instance as far as the server is concerned to ensure security in the transmission of information. This is the case in Spain where the Ministry of Education does not have the capacity nor adequate safety measures and that would need to be covered by the Corrections Department.

Aula Mentor has been successfully adopted for use in America (see *Table* below).

## *Results and impact analysis*

### *Scale of Aula Mentor's impact*

There are currently a total of 444 classrooms in operation in various locations throughout the Spanish territory. The distribution by autonomous communities and regions is as follows:

*Table 9 - Distribution per autonomous communities and regions*

Asturias	21
Aragon	100
Castilla Leon	60
Castilla La Mancha	39
Cantabria	11
Rioja	9
Andalusia	27
Catalonia	10
Balearic Isles	3
Canary	17
Galicia	15
Navarre	6
Valencia	15
Basque Country	3
Murcia	38
Extremadura	6
Madrid	59
Ceuta and Melilla	3
Other	2

Enrolment in each area varies, with many more students in schools that are in an urban environment. This must be taken into account when making an economic assessment of the profitability of the project. Not forgetting, of course, the need for training in disadvantaged rural areas.

There are also classes in the Latin American countries.

Paraguay - Three classrooms, one in a prison in Asuncion.

Nicaragua - Three classrooms currently open.

Dominican Republic - Two classrooms.

Costa Rica - Seven classrooms.

Peru - Four classrooms.

Honduras - Two classrooms.  
Guatemala - One classroom.

*Success rate of students who have completed the course and received certification.*

The *Table* below contains dropout and achievement rates confirmed by the State.

Achievement rates are for students who have completed a full course and have obtained official certification after passing an examination.

A 'dropout' is a student who has started the course and then, for various reasons has left half way through: i.e. has not completed the assignments that have to be submitted to the tutor concerned.

A 'no final assessment' student is one who has completed all course activities but did not subsequently take the examination to obtain a certificate. These figures are very low and suggest that this cohort does not need formal qualifications, but is learning for pleasure or to extend knowledge.

Table 10 - Dropout and achievement rates confirmed by the State

	<b>Pass rate</b>		<b>Dropout rate</b>		<b>No final assessment</b>	
<b>Community</b>						
ANDALUSIA	51	%	47	%	2	%
ARAGON	54	%	43	%	3	%
ASTURIAS	50	%	47	%	3	%
CANARIAS	29	%	65	%	6	%
CANTABRIA	49	%	48	%	3	%
-CASTILLA-LA MANCHA	50	%	47	%	3	%
CASTILLA-LEON	55	%	44	%	1	%
CATALONIA	30	%	64	%	6	%
CEUTA	48	%	51	%	1	%
BASQUE COUNTRY	34	%	61	%	5	%
EXTREMADURA	51	%	48	%	1	%
GALICIA	55	%	41	%	4	%
BALEARIC ISLANDS	43	%	52	%	5	%
RIOJA	50	%	48	%	2	%
MADRID	38	%	59	%	3	%
MELILLA	38	%	61	%	1	%
MURCIA	54	%	44	%	2	%
NAVARRRE	34	%	61	%	5	%
VALENCIA	43	%	52	%	5	%
<b>Total</b>	<b>45.05</b>	<b>%</b>	<b>51.74</b>	<b>%</b>	<b>3.21</b>	<b>%</b>

<i>Ibero-American Countries</i>	<i>Pass rate</i>		<i>Dropout rate</i>		<i>No final assessment</i>	
<i>COSTA RICA</i>	31	%	38	%	31	%
<i>HONDURAS</i>	16	%	82	%	2	%
<i>NICARAGUA</i>	27	%	68	%	5	%
<i>PANAMA</i>	40	%	60	%	0	%
<i>PARAGUAY</i>	20	%	77	%	3	%
<i>PERU</i>	49	%	48	%	3	%
<i>DOMINICAN REP</i>	31	%	69	%	0	%
<b>Total</b>	<b>30.57</b>	<b>%</b>	<b>63.14</b>	<b>%</b>	<b>6.29</b>	<b>%</b>

#### *Cost/benefit analysis*

In economic terms, a part of the project cost is self-financing. Student tuition fees (€24per month) finance part of the teaching tutorials, which covers the daily tutor support students receive, and part of the expenditure on classrooms.

Expenditure for staff responsible for the administration of each Mentor Classroom is provided by the municipalities or the relevant administrative body. Thus, in some cases the council requires an employee with another job to devote part of their working time to running the Mentor Classroom, so the cost is difficult to quantify. In other cases it may be a teacher in a centre who dedicates part of their teaching hours to look after Aula Mentor, which again is not easy to quantify. In any case, these charges are not related to Aula Mentor and any estimate made would be unreliable.

The part paid for directly by the Ministry refers to the costs of developing new courses, updating old courses, training tutors and training managers which are provided by the national office. In addition this includes the cost of the coordinator's post (whose task is to appoint invigilators for examinations for each course and also to coordinate teams of course tutors, and deal with potential claims that students make regarding course tutors). The coordinator's salary comes mainly from the Ministry. Finally, considerable resources are spent on updating the software and tools, platform development, server maintenance etc. The cost of this work is estimated at €600,000 per year.



This item does not include salaries of staff who work exclusively on the Mentor project (mentioned in the first part of the report), nor the trainees who receive income from scholarships from another section of the Ministry training division.

#### *Weak and strong aspects*

Some main weak and strong aspects related to the Aula Mentor project are given in the *Table* below.

<b>Strong aspects</b>	<b>Weak aspects</b>
Aula Mentor targeted at groups who cannot access training courses for a variety of reasons.	Aula Mentor is a project with potential for growth and expansion, not only geographically, but mainly to extend it to other groups that require special training but for whom it is very difficult and expensive to get to face education.
Prison population prioritised by the practice.	Need to provide prisons with safety measures and technical equipments (i.e. specific software) needed to attend Aula Mentor classrooms.
Strong commitment of the Government and agreement among different parties involved make the project stable and longlasting. Once the agreements between institutions are finalised and the related difficulties are solved, the creation of courses is flexible and productive.	The steps in the management and agreement processes delay the response to the demand for training at any time.
Mentors as key components of the programme as they are responsible for ensuring that learning objectives are met online.	The Ministry of Education shall have the capacity and the responsibility to recruit, train and select mentors (quality control).
Interdisciplinary team of experts charged with elaborating learning materials for online delivery and others to support content delivered online, such as Cd-Roms and study guides.	Financial resources needed to recruit and involve experts in content, pedagogy, programme design and implementation.

Strong aspects	Weak aspects
Appropriate technical equipments	Financial resources needed to maintain the necessary hardware and have Internet connections working, to select and pay for technical staff to maintain the machinery and address any technical problems that might be encountered while the machines are in use.