

Guidance in the Workplace

Transfer of Innovation to Develop Guidance to those in Employment

Evaluation Report 4 – Developing the Case Studies

March 2009



Education and Culture



Project Partners

Sweden:

**CFL (Centre for Flexible Learning)
municipality of Söderhamn**

www.cfl.soderhamn.se



Italy:

Aster Scienza Tecnologia Impresa

www.aster.it



Romania:

Fundatia Centrul Educational Soros

www.sec.ro



Slovenia:

Slovenian Institute for Adult Education

www.acs.si



PIA. Velenje

www.pia.si



France:

**Centre Interinstitutionnel de Bilan
de Competences Artois Ternois**

www.cibcarras.org



www.guidanceintheworkplace.eu

Introduction

The Guidance in the Workplace project is a transfer of innovation project which aims to transfer learning about different ways of offering advice and guidance to those in employment. This means advice and guidance which can be integrated into the workplace. This can be done by guidance workers liaising with employers, trade union representatives, training managers and human resource managers. One key angle of the project is to develop training for counsellors providing advice. The project runs from the 1st of November 2007 until the 31st of October 2009. For more information on the partners participating please see www.guidanceintheworkplace.eu.

Guidance in the Workplace partners are: CIBC (Centre Interinstitutionnel de Bilan de Competences Artois Ternois) in France, ASTER (ASTER societ  consorile per Azioni) in Italy, SIAE (Andragoski Center Slovenije) in Slovenia, SOROS (Fundatia Central Educational Soros) in Romania and CFL (Centre for Flexible Learning) in Sweden.

The transnational project aims to create new knowledge among the participating partners and others taking part in the activities. The outcomes of a prior Leonardo project, Guidance Merger (www.guidance-merger.org), will be used, as well as new input from the participating countries. The experience from Guidance Merger was that it is very difficult for guidance counsellors alone to gain access to employer's premises without the assistance from other organisations. It was clearly seen that workplace counselling needs a long term relationship with the employer. It is important to "open doors" to get in to the premises and that was in the Guidance Merger project done by liaising with other organisations, already performing work in the companies. How this was done, and which organisation the co-operation was initiated with differed in the partner countries. Traditions and historical background vary and suitable partners to co-operate with must be seen in the light of each country's history or tradition. The majority of the partner countries in Guidance Merger teamed up with organisations in the field of workforce development, including in some cases trade unions, which had an ongoing, established co-operation with the employers. In this way the service could be effective, simple and accessible for the firms.

The Report

This third evaluation report focuses on some of the transfers of innovation which the Guidance in the Workplace Project has produced so far. It also depicts some of the processes that have taken place in each and every partner's national project as well as plans for training of those who are to provide the service of guidance in workplaces in the regions.

The project evaluation has an interactive approach where research is being done together with the participants. This report is therefore built on notes taken at a partner meeting/training session in Arras in January 2009. Prior to the meeting research questions had been sent out to the partners. The research done before the Arras meeting aimed to investigate what had been done so far, and what will be done in terms of training and providing services in the workplace during 2009. The notes taken at the Arras meeting have been read and revised by the partners.

Work Progress

This section depicts how the services in the companies will be provided by the partners. The section also shows the process of finding companies (for more details on co-operating partners see evaluation report 2).

Italy

ASTER is one of the “old” partners who contributed to the Guidance Merger project. They have, throughout the Guidance in the Workplace project, explained that guidance in workplaces is not commonplace in Italy. Since the Guidance Merger Project ASTER:s business strategy has changed and they have re-organized their organisation’s work¹. In Italy guidance and counselling from an external partner is by tradition only done when companies need support with outplacements. Only authorized persons can give this service. Furthermore, the employment agencies only work with unemployed individuals except for outplacements. Therefore ASTER has decided that the project result from Guidance Merger and the training visits in Guidance in the Workplace will be diffused but not tried out in practice during the Guidance in the Workplace project. By diffusing project result and involving human relations staff in companies and employment office staff, ASTER sees a way to evoke a future interest for guidance in the workplace.

ASTER staff feels that working with companies’ human relations staff can be one way for the organisation to develop future pilot projects and studies on guidance topics that are of interest both to the employer and to their own organization. They believe this will help ASTER to better understand the needs of companies and it may also be a way to gain trust from the companies.

The Guidance in the Workplace project has been promoted throughout the year with flyers that have been distributed, also to other European partners in other Leonardo projects working with guidance related objectives. There have been meetings with the experts from STOA and ISFOL throughout the project².

France

France has a system for skills audit and evaluation of prior work and education for individuals (APEL). It is financed through taxes paid by companies. Attached to this report are a few documents explaining the different systems in a very simple way. The system was fully explained during the Arras meeting and it was part of the training that took place. The abbreviations in the text below are explained in the attached documents.

The French partner, CIBC, has chosen companies with more than 50 employees that are well represented in their region. The companies are in businesses such as food processing, catering, hotel and building businesses. CIBC has approached 16 companies so far, by phone. The Human Relations department in each company was asked to answer a questionnaire. The form was filled in by the CIBC staff and included questions like; do you know APEL and if so are you acquainted with the different approaches (for which diploma to seek etc.). Depending on previous answers, other questions where; whose initiative has former APEL-processes for staff been and will you suggest APEL to your employees in the future. Then a few questions about the company were asked. The CIBC tried to minimize the questions on the phone. Further details were asked at the companies that accepted a visit.

Out of the 16 companies contacted so far (January 2009), two has accepted to work with CIBC. The 14 who did not want to take on the offer all gave the same reason. Because of the economical situation their main concern was their production and the overall survival of the company. Training and

¹ For more details see the first evaluation report in the Guidance in the Workplace project.

² STOA’ BUSINESS SCHOOL organises Master MBA and thereby has contacts with a network of managers and human resources consultants. ISFOL is a national body that has developed several studies on guidance on the subject of training of workers. They are co-operating partners with ASTER in the Guidance in the Workplace project.

guidance is a long term commitment and the companies' main concern is with short term problems in production due to the current world wide financial crisis. A few companies said that they may have need for CIBC services for one or two members of staff, but not for the company as a whole.

One of the companies that took an interest is Herta. They are mainly interested in the skills audit (the part of the skills audit which aims to stress some abilities and to help staff find their own abilities in themselves). This has been carried out by the CIBC. The aim was to find the most suitable diploma, should the member of staff need to validate his or her knowledge and skills. The second organization that wanted the services offered by CIBC, Conseil du pas-de Calais (which is a public organisation), wants support for the employees who are interested in APEL. CIBC makes visits before the member of staff files their request for APEL. The whole APEL procedure is explained to staff members by a counsellor from CIBC. Applications from staff members for APEL have been submitted. The support from CIBC will go on further into the validation process, should any staff member's application be accepted begin his or her APEL.

The CIBC staff thinks that the success in the private company is most likely due to the fact that the proposal from CIBC matched the company policy at the time when CIBC offered an opportunity for the company to take part in the Guidance in the Workplace project. Another factor for success is believed to be that participation in the project is free of charge.

CIBC will revise the initial questionnaire for companies. They will also be discussing how they can make the offer more tempting for the employers. At the Arras meeting other partners gave the advice, that it might be a good idea to use other contacts to get in to the workplaces. One such contact might be the chamber of commerce, but it could also be other employer associations and/or trade unions. There was also a discussion about the manner which the companies were approached. Some partners had found it easier to contact the owners or top management directly and in person.

The French partner feels that giving advice and guidance in workplaces would be easier if the law was changed. Now, an employer cannot demand to see the results of a skills audit for an individual member of staff, even if the initiative came from the employer. An employer is not likely to pay for something he will not be able to see results from. The fact that there are different funds depending on whose initiative the APEL is is also considered a hindering factor. Even if activities that are listed on the company training plan are covered by FONGECIF in part and by OPCA in part, costs must be calculated by the employer. Often the funds that can be retrieved externally will not cover the real cost. Another hindering factor, the CIBC staff mentioned, is that the skills audit has a bad ring to it with many employers. The Skills audit is often used by employees in France who would like to change work places.

The CIBC recognizes that in order to gain sustainability of guidance in the workplace it is important that the services also will benefit their own organization. The Guidance in the Workplace project can benefit other CIBC organisations in the region. Since CIBC now is independent from the state, with no state funding they need to find new networks to work with³. The Guidance in the Workplace project is one way of seeking contacts with companies. There are plans to make more contacts with companies, but the manner of approach needs to be planned further. Something which the CIBC have tried, but that did not work, was to give breakfast meetings. The company representatives came, but they were reluctant to talk about guidance in the workplace. Training provided in the Guidance in the Workplace project is to be offered to all CIBC offices in the region.

³ Since the Guidance in the Workplace project started, government funding has been withdrawn from CIBC. This has changed the organisations business strategy – more on this in evaluation report 2.

Romania

Eight companies have been approached by the Romanian partner SOROS or the County Employment Agency in Miercurea Ciuc which SOROS cooperates with in the Guidance in the Workplace project. Personal contacts proved to be important to be able to reach companies. SOROS staff has offered guidance to two companies and will continue to give guidance in all of the companies approached.

Most of the approached companies are in the tourist sector. SOROS staff considers these types of companies to be more open to change which is why they were approached first. Face to face discussions and an informal approach proved to be more successful than the previous attempt to reach companies by formal letters and emails. The contacts were made with company owners directly, not with Human Relations departments. When making contacts, emphasis was made on the experiences other companies had had. One of the examples used was from the study visit in Sweden in the Guidance in the Workplace project, in September 2008. The first meeting with the employer was an open discussion, without pressure on the company to participate. The aim was to show benefits like better skilled or qualified workers and long term stability on the market.

SOROS is a learning centre for adults. To ensure long term effects at SOROS, and to further the benefits for the companies, development has been made to make SOROS more of a demand responsive learning centre. Information has been gathered and benchmarking has been made. The Swedish partner, CFL is one of the benchmarked organizations, taking part in a project called 3 M (Learning centres as Motors, Mediators and Meeting places) If guidance in the workplace can be combined with more demand responsive courses at SOROS, it is believed that the guidance in the workplace will be even more attractive to the employers and that more demand responsive courses at SOROS also will make it possible to sustain guidance in the workplace for the years to come.

Furthermore, there have been some dissemination activities in Romania. One roundtable seminar with representative from the Employment Agency of Harghita county and Miercurea Ciuc has been held. The network created by Soros within the project which includes some of the employment agencies in Romania has been informed about the project and they are informed on a regular basis as the project progresses.

Slovenia

Before introducing guidance in the workplace to employers, the Slovenian Chamber of Commerce and Industry was approached by the Slovenian partner, SIAE. The chamber was asked to write an introductory letter, explaining the intentions of SIAE and inviting the companies to be involved in the project. SIAE staff has found that the chamber is well renowned in Slovenia and projects initiated by them often are received well by companies.

When selecting the companies, SIAE searched for companies that were in trades or business areas with staff with low level of formal education and training. Companies with less than 250 employees were eligible to take part in the project. They also looked for companies where staff members have had very little or no training and continuing education. The companies were also selected based on an initial interview and an active decision from the employer to participate in the project.

In each of the three Slovenian regions taking part in the project, contacts have been made with 2-4 companies. More companies are interested in guidance in the workplace than the amount of companies that can be offered the services in the Guidance in the Workplace project. However, the plan is to come back and offer guidance at a later stage, when more counsellors have had training. Guidance in the workplace will be given to three companies in three regions and a fourth company will be given information, but not the full support that is offered to the others. The company's planned to take part

in the project is: MKI, Kovinotehna (196 empl.) in Novo mesto; Tomos (77 empl.) and Cimos (350 empl.) in Koper; and KOŠAKI (220 empl.) in Maribor. One has made an agreement at this stage (January 2009), and the others are expected to follow soon.

The trade union ZSSS is a promoter of Guidance in the Workplace. There is an agreement to continue to work together in the three regions after the Guidance in the Workplace project has finished. One official from ZSSS attended the meeting in Arras, January 2009. He expressed that union representatives are very motivated. Guidance in the workplace is important also in the trade union work; in the future but also now in times of crisis. It can be an opportunity to save the jobs if staff gets training now. A new law in Slovenia provides funds for companies that want to cut working hours from 40 to 36 hours per week. Negotiating it, the ZSSS came up with the idea to use those funds for training staff instead. Some companies are expected to do so, but none has so far (January 2009). The law is very recent.

The contacts made with ZSSS were made well in advance, and the guidance in the workplace has been planned together. The guidance will be given by union representatives on a regional level together with guidance counsellors from regional guidance centres for adult education which operate in 14 Slovenian regions. The centres provide guidance and counselling for adults and connect education providers and guidance in the area. The SIAE has developed the unified concept of guiding centres and continues to monitor and develop guidance activities in them. Working together, the union representatives will give information and the counsellors will get more in depth with the guidance in the workplace.

The Slovenian partner believes that the SIAE:s contact with ZSSS has been strengthened through the Guidance in the Workplace project. The two organizations have worked together before, but the cooperation is now more formalized. The state institution and the trade union both express that guidance in the workplace is important, but for different reasons. Lifelong learning gives richer opportunities for union members to advance in their carriers, but it may also lead to higher salaries if employees can take on more responsibilities. The main aim for SIAE is to promote lifelong learning. The two organizations can also see benefits for the employers; with better trained staff productivity can increase and profits can go up. As the ZSSS official put it: "we all have the same goal but for different reasons, and we can only succeed if we work together".

The guidance in the workplace will take place in selected companies twice a week in April-May 2009. There are plans to apply for European social funding to continue work on offering guidance in the workplace.

The Guidance in the Workplace project has been promoted in Slovenia. Leaflets have been handed out (500). In December 2008 at a regional conference in Novo mesto the project was introduced to a group of employees and to other professionals in adult education. In December 2008 the project was also presented in a work group at a national conference to "bridge the gap between education and economy". Later in December Guidance in the Workplace was presented and discussed at a workshop for all guidance centres in the 14 regions. An annual report was prepared which has been accessible to all other colleagues at SIAE. The trade union magazine "Worker's Unity" received an article to be published in February 2009.

Further plans for promotion and dissemination during 2009 include continuous dissemination by both ZSSS and SIAE. The activities will be run on a local level through a regional network of adult education guidance centres and the regional ZSSS union organisation network. The SIAE and the ZSSS as coordinators of local networks will continue to work regularly with these networks to ensure that the activities of guidance at the workplace will continue to be a part of their activities. To learn from the Guidance in the Workplace Project and to plan new development, a final workshop for all national partners in Slovenia is planned in September/October 2009. Regional trade union representatives will then be invited.

Sweden

Although giving advice and counselling in the workplace is a part of the CFL strategy for cooperation with companies in the region, counsellors at CFL have found it more difficult to offer advice in companies since the world wide financial crisis has hit. The employers are reluctant to make any kind of plans or decisions for the future at the moment. Contacts were made with five companies just before Christmas 2008 and one the second week of January. All of the employers at those companies say that their priority is to survive the crisis.

As a learning centre, CFL has more than guidance in the workplace to offer the workplaces. Different trainings and courses are one of those things; cooperation with companies that take on trainees from other courses at CFL (for unemployed or others) is also important. This has in the past been one way to get into the workplace, to be able to offer guidance and training of company staff. Most companies however do not want to take in trainees at the moment, due to the financial situation. Some staff and trade union representatives are worried that this might jeopardize the jobs for those already employed. Despite of this two companies that are willing to take on trainees have been found recently.

Transfer of Innovation

The guidance in the Workplace project is a transfer of innovation project. It is therefore important to investigate if there has been any transfer of innovation – that is learning among the partners. We are beginning to see transfer of innovation and we will now share some of them⁴. Transfer of innovation involves learning. We are about to say that there has been learning at the partner meetings. But before we do so, there is a question to be asked; when do we know that learning (i.e. transfer of innovation) has taken place? We do not believe that one can say that something is learned just because a person says that he or she has learned. We believe that it is the action that speaks. If action towards something is taken, on basis of reflections alone or with others, we know that learning has occurred. In the Guidance in the Workplace project, reflections are made together at partner meetings – we call this joint learning. Reflections are made outside the partner meetings too and we can never be absolutely sure which lead to one thing or another.

A comparison, with the notes from the two first partner meetings and actions taken by partners, indicates that transfer of innovation has taken place. Examples of this are how one of the first discussions at the first partner meetings was on the fact that those who participated in Guidance Merger project had found it essential to find “door openers” to be able to get in to companies. The Slovenian partner has used “door openers” to get into companies. The initiating letter from the Slovenian Chamber of Commerce and Industry is one such example. Teaming up with a national trade union is another.

At the first meeting, in Ljubljana, when conclusions from the Guidance Merger were discussed, it was stressed that in order for the guidance in the workplace to be sustainable, it needs to “fit into” the service providing organisation. The French partner took note of this and when, well into the project, preconditions changed for their whole organisation and public funding was no longer available, they could see that providing guidance in the workplace may be a new business strategy. The Guidance in the Workplace project will help provide training so that counsellors at CIBC offices throughout the region can switch modes and develop more company orientated methods. We also see that The Slovenian partner kept in mind that to sustain the services they need to be in line with the organisations’ strategies, and when engaging the trade union as a co-operating partner also with its policies. The guidance in the workplace fits nicely into the trade unions strategies to ensure members’ life long learning and thereby enhancing member’s careers. Although this might well be something that the SIAE would have thought of even if they had not been a partner in the Guidance in the Workplace project, it shows that the conclusions of the Guidance Merger project were accurate. The Romanian partner changed approach when trying to establish contacts with companies and co-operating organisations failed. At first they tried to approach organisations through emails, but then changed into a personal, more informal approach, like CFL. This is something that was discussed at the Söderhamn partner meeting by the Swedish partner.

Another example of transfer of innovation is how it was difficult for Romania in the beginning to find partners to co-operate with to get in to the workplaces. It was hard to find organisations that were oriented towards providing support and services for companies in the region. In the public employment agencies only a few individual counsellors were interested. This is due to structures and traditions in Romania. At the first partner meeting in Ljubljana there was a discussion on how to try to overcome this. One suggestion from the Swedish partner was to work with those who are interested in getting into workplaces or those who are already providing services to workplaces and looking

⁴ Since the Guidance in the Workplace project is a transfer of innovation project, this will be discussed further in the final report

to widen their services. Romania had a prior contact with an organisation that provides services in the human relations field to employers and decided to use this. Furthermore the contact with CFL in the Guidance in the Workplace project has influenced SOROS to make contact with another CFL project, 3M. 3M has inspired the SOROS learning centre to become more demand orientated when providing courses. This is yet another way to be able to reach into the companies without those other co-operating partners that proved to be difficult to find. The plan is to make SOROS interesting to companies in the region on their own accord, making them less dependent on other organisations to be “door openers”. This last example of learning is an example of joint learning, where new knowledge is developed together with others in the project. Knowledge is not just transferred, but also redefined in a new context.

Concluding Discussion

In the two prior evaluation reports, we have followed the partner’s efforts to find organisations to co-operate with in order to get into workplaces, so that guidance in the workplace for staff members can be offered. In order to be able to give services to those in employment it is essential to work together with employers. This was undoubtedly shown in the Guidance Merger project. The conditions in each country are far from similar. The organisations that own the project are different, with different aims and strategies. What services they offer to companies and how they do it must be in line with their business strategies or overall aims. Furthermore, the aims or business strategies of the organisations the partners work with (the “door openers”) also need to fit into the scheme. If they do not, most likely the guidance in the workplace will not be offered by them in the future. In some countries it is very difficult to find such partners. Here Romania is one example. They instead turn towards their own organisation, trying to develop it to become more interesting for employers. Equally the employers’ standpoint differs in the five countries, but also locally depending on point of view. Some are very reluctant to let other organisations in. some are very far away from seeing that advice and guidance for employers can be useful for the company too.

To find partners to co-operate with and to find and show employers that they will benefit from guidance for their employers, is likely to be the most difficult part of making guidance in the workplace happen. However finding partners and companies does not mean instant success. The counsellors and advice givers will now have two interests to keep in mind, both that of the employer and that of the employee. Therefore the training that is offered to the advice and guidance providers in the Guidance in the Workplace project needs to have both of these focal points. Furthermore the training wants to be relevant for the participants and in line with the service providing organisation’s strategies or aims. Because of this the national training sessions will take the local and structural conditions in each country into account. The training events will be separately evaluated but also described in the forthcoming case studies.

Last we arrive at those who will receive the services – the company staff members. Will they feel that the services provided has helped them to better their careers or other areas of their lives or will they feel that the services are just there to benefit the employer? Will the services provided in the Guidance in the Workplace project be balanced so that everyone (employee, employer and service provider’s organisations) is a winner? The case studies to be presented in the final report take their stand in just these questions along with questions concerning the position of the counsellors and advice givers.



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Andragoški center Republike Slovenije
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