

Self-directed Learning

Learn.Empowerment

Self-directed Learning for Low-skilled Unemployed People



Guidelines for Integration of Self-directed Learning into Vocational Education and Training of Low-skilled Unemployed Persons



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Guidelines

**for Integration of Self-directed
Learning into Vocational Education
and Training of Low-skilled
Unemployed Persons**

PROJECT PARTNERSHP

The project consortium comprises 14 partners from 11 countries. The multi-actor partnership includes, as well as the expert and development partners, labour market administration organisations and social partners.

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- Volkshochschule Cham (DE)
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INTRODUCTION

Self-directed learning (SDL) enables and supports the development of personally and socially relevant self-management competences. It strengthens self-confidence and leads thus to the ability to act in an emancipated and secure way in the social and work environment.

Especially target groups who have no affinity to and no experience with learning – and these are the target groups the project is focusing upon – connect "learning" with failure, imposition and with no perspective, because they did not previously experience learning as useful and valuable for themselves. It is at this point where self-directed learning can start, at the individual person and his/her interests and ideas: it activates current competences, helps to develop perspectives and promotes the development of professional methodological, social and personal competences as tools for self-control.

Self-directed learning imposes on the learners responsibility for their own learning process. They are integrated into the design of their learning process and thereby experience the fact that learning has something to do with them personally. If learners are supported and accompanied in their self-direction by trainers, tutors and/or by fellow learners in a learning group, learning can become a valuable and sustainable experience.

In order to disseminate this concept the partner consortium of "Learn.Empowerment Self-directed Learning for Low-skilled Unemployed People" has published the following outcomes.

- The **Toolbox** describes self-directed learning as a didactic concept as jointly elaborated by the partners in this project. The Toolbox reflects the situation and understanding of the partners and their ideas of teaching and learning on which this concept is based. It describes the organisational aspects of SDL, the role of the trainers as tutors, provides links and is illustrated by examples of good practice.
- The **Guidelines** reflect the background of self-directed learning and comprise theoretical and conceptual aspects as well as the consideration of gender mainstreaming, diversity management and target group oriented aspects.
- Chapter 1 describes several types of models for self-directed learning, focusing on the process-oriented aspects of SDL, represented by a mixture of conceptual, empirical and experientially derived views.

- The transition to a flexible and individual design of the learning/training process demands openness and flexibility from all actors involved, including the learners, the advisors and the institution itself. At the same time it requires orientation, guidance and supporting elements in order to structure the individual and collective learning processes and to clarify the necessary responsibilities and commitments - Charter 2 describes the principles of CoL, the "Concept of Learning" via SDL. These principles are points of orientation for professional action. They form the core out of which the context-specific concepts of self-directed learning can be developed.
- The target groups benefiting directly from the outcomes of the project "Learn.Empowerment" are multifaceted. There is a broad range of potential users as key actors, training organisations as well as trainers, adult educators and teachers throughout Europe, who are empowered to deliver training themselves and to disseminate the idea and the concept of self-directed learning, its principles, tools and methods.

Chapter 3 focuses on the beneficiaries, who often suffer from individual barriers to (lifelong) learning. It broaches the issues of the target group-related aspects of self-directed learning and discusses the relevant attitudes of socially disadvantaged groups such as working-class people with limited schooling, single parents, women returners, migrants, elderly people, disabled people and residents of rural areas who, due to their situation, have difficulty gaining access to adult education programmes.

- Experiencing failure in the world of work in many cases results in loss of self-confidence, which can also lead to resignation to one's situation. Chapter 4 "Working with low skilled and unemployed", underlines specific potentials, methods and techniques within the concept of self-directed learning, which contribute to the empowerment of adult learners. SDL strengthens self-confidence and thus leads people to act in an emancipated way, to extend competences contributing to employability and to become re-integrated into the labour market.
- Research shows that gendered roles still largely shape the vocational development of both sexes and unless assumptions about gender roles are challenged they risk being perpetuated. It adds to the challenges of the tutoring process the tasks of providing learners with information, advice, guidance and active support, preserving the principle of equal treatment for men and women as regards access to vocational training and promotion, employment and working conditions. Chapter 5 provides information on the general background of the European

strategy and labour market oriented realities and measures concerning gender mainstreaming.

- Many trainers, adult educators and teachers think that "fairness" means "treating everyone the same". Chapter 6 focuses on aspects of diversity management. Acknowledging the target groups' differences and recognising these differences as valuable enhances good tutoring and counselling practices by preventing discrimination and promoting inclusiveness.
- The glossary (Chapter 7) contains some 20 terms relating to the concept of self-directed learning, which the partners of the project have highlighted as particularly important for SDL.

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1 THEORETICAL APPROACH TO SELF-DIRECTED LEARNING (SDL)

Self directed learning as a process

SDL is a process of learning in which people take the primary initiative for planning, carrying out and evaluating their own learning experiences. This form of learning can take place both inside and outside institutionally based learning programmes. For most people, being self-directed in one's learning is a natural part of adult life. There are several types of models for describing self-directed learning as a process, represented by mixture of conceptual, empirical and experientially derived views.

The purpose of self directed learning

According to Knowles, Hiemstra, Mezirow, Collins and others, self directed learning has three major broad aims:

- 1 To enhance the ability of adult learners to be self directed in their learning. This goal is primarily grounded in the assumptions of humanistic philosophy, which posits personal growth as the goal of adult learning. The main representatives of this concept are Brockett and Hiemstra (1991). They state "that human nature is basically good... that only by accepting the responsibility for one's own learning is it possible to take a proactive approach to the learning process... that means also personal autonomy and freedom to make choices."
- 2 To foster transformational learning as central to self directed learning. This goal is found primarily in Mezirow's (1985) and Brookfield's (1985) work. They state that "there is probably no such thing as self directed learning, except in the sense that there is a learner who can participate fully and freely in the dialogue through which we test our interests and perspectives against those of others and accordingly modify them and our learning goals." In essence, adults need to reflect critically and have an "understanding of the historical, cultural and biographical reasons for one's needs, wants and interests. ... such self-knowledge is a prerequisite for autonomy in self directed learning."
- 3 To promote emancipatory learning and social action as an integral part of self directed learning. This ability to be self directed in one's learning is conceived as both a set of personal attributes and, specifically, skills (Hiemstra, 1991, Caffarella & O'Donnell, 1989). The goal of promoting emancipatory learning and social action includes not only the examination by learners of the sociopolitical assumptions under which they learn and function, but the incorporation of

collective action as an outcome. That also means viewing self directed learning as merely a technique "to condition the individual into taken-for-granted acceptance of what is offered. ... Unequivocal focus on emancipation as a core concern" (Collins, 1996).

Models of self directed learning

Linear Models

These models offer learners the opportunity to move through a series of steps to reach their learning goals in a self-directed manner. The resulting frameworks of the learning process for these models include many elements of the traditional teaching process. For example Tough's (1979) comprehensive description of self directed learning, which he termed self-planned learning, proposes a model of thirteen steps in self-planned (directed) learning projects, representing key decision-making points about choosing what, where and how to learn:

- 1 Deciding what detailed knowledge and skill to learn...
- 2 Deciding the specific activities, methods, resources, or equipment for learning...
- 3 Deciding where to learn...
- 4 Setting specific deadlines or intermediate targets...
- 5 Deciding when to begin a learning episode...
- 6 Deciding the pace at which to proceed during a learning episode...
- 7 Estimating the current level of his (*sic*) knowledge and skill or his (*sic*) progress in gaining the desired knowledge and skill...
- 8 Detecting any factor that has been hindering learning or discovering inefficient aspects of the current procedures...
- 9 Obtaining the desired resources or equipment or reaching the desired place or resource...
- 10 Preparing or adapting a room (or certain resources, furniture or equipment) for learning or arranging certain other physical conditions in preparation for learning...
- 11 Saving or obtaining the money necessary for the use of certain human or nonhuman resources...
- 12 Finding time for the learning...
- 13 Taking steps to increase the motivation for certain learning episodes...

Interactive Models

These models suggest that the learning process is not so well planned or linear in nature. Rather, there is an emphasis on two or more factors, such as opportunities people find in their own environments, the personality characteristics of learners, cognitive processes and the context of learning, which collectively interact to form episodes of self directed learning.

For example Spear's (1988) model rests on three major elements: the opportunities people find in their own environments, past or new knowledge and chance occurrences. The process of self directed learning can be reduced to seven principal components:

Knowledge

- 1 Residual knowledge: knowledge the learner brings to the project as a residue from prior knowledge
- 2 Acquired knowledge: knowledge acquired as part of the learning project

Action

- 3 Directed action: action directed toward a known or specific end
- 4 Exploratory action: action that a learner chooses without knowing what the outcomes might be or with certainty that any useful outcome will ensue
- 5 Fortuitous action: action that the learner takes for reasons not related to the learning project

Environment

- 6 Consistent environment: includes both human and material elements that are regularly in place and generally accessible
- 7 Fortuitous environment: provides for chance encounters that could not be expected or foreseen and yet affect the learner and the project

Instructional Models

This category represents frameworks that instructors in formal settings could use to integrate self directed methods of learning into their programmes and activities. That means making allowance for more learner control and independence within these settings.

For example Grow's (1991) staged self directed learning model outlines how teachers can assist students to become more self-directed in their learning:

Stage 1: learners of low self-direction who need an authority figure (teacher, mentor) to tell them what to do

Stage 2: Learners of moderate self-direction who are motivated and confident but largely ignorant of the subject matter to be learned

Stage 3: Learners of intermediate self-direction who have both the skill and the basic knowledge and view themselves as being both ready and able to explore a specific subject area with a good guide

Stage 4: Learners of high self-direction who are both willing and able to plan, execute and evaluate their own learning with or without the help of an expert

Within these stages we can outline possible roles for the teacher or facilitator, depending on the learner's stage. Good teachers individualise their teaching strategies to match the learner's stage of self-direction and allow the students to become more self-directed in their learning.

2 METHODOLOGICAL APPROACHES

- Pedagogical Principles

The CoL as an organisational framework giving orientation and structure

The process-guiding Concept of Learning is an andragogical, structuring **conception**, which is contextualised in institutional and target-group-specific **concepts**. Process-guiding CoL is an approach that is characterised by a certain **educational attitude**, which condenses in the form of action-leading principles and finds its expression in didactical-methodical elements. Its principles and didactical-methodical elements thus offer a framework that is to be filled by context-specific concepts.

The individualisation and flexibilisation of the learning/training process demands openness and flexibility towards the process from all people involved (learners, advisors and institution). At the same time it requires orientation and supporting elements in order to structure the individual and collective learning processes and to clarify the necessary responsibilities and commitments.

CoL provides such orientation and structure by its principles and the associated design elements. This framework allows for discovery and unfolding of potentials of self-direction in learning within social contexts. Thus CoL represents a contribution to institutional vocational training for the accomplishment of the increasing social requirements for lifelong and self-directed learning.

Aims of CoL

- **Promote learning (management) competence**

To deliberately handle the innate and acquired learning abilities we call "learning competence". Understood as the ability to manage a learning process, it comprises, *inter alia*, the ability to determine learning goals autonomously, to take control over ways of learning, to organise the basic conditions of learning in a self-directed manner (e.g. learning times and locations) and to evaluate the learning results.

Learning competences develop and change in the context of the individual learning biography. Process-guiding CoL allows for a reflexive handling of this biography and

- the acquired abilities. It promotes the discovery of existing (learning) potentials and their advancement in the context of the ongoing learning process.

Thus the learning competences of the learners and the advisors involved are advanced.

- **Promote the assumption of responsibility for individual (and collective) learning processes**

Taking responsibility for one's own learning process is one of the basic conditions for utilise learning potential for the direction and organisation of the learning process. By organised forms of shared responsibility and participation and by having a high degree of transparency, CoL facilitates this basic element of self organisation in learning.

- **Handle the requirements resulting from social change in a personality-strengthening way**

By enabling the discovery and unfolding of self-learning potential, CoL can be seen as a contribution to the system of institutional adult education for the handling of the social requirements of lifelong and self-organised learning. Learning competence is a necessary – although not sufficient – condition for the accomplishment of various social changes and the affiliated requirements concerning learning, working and living.

Principles for orientation

The central basis for CoL is what we call a specific **educational attitude**. In our opinion this attitude forms the foundation of a new **learning culture** and is the source of diverse challenges for advisors, learners and training providers. This basic attitude can be described by action-guiding **principles**. These principles are points of orientation for actual professional action. They form the core out of which context-specific concepts of CoL must be developed. The principles are the following.

Principle: Orientation on the participants - division of responsibility and facilitation of self-responsibility

In order to facilitate self-organisation and self-direction in the learning process, it is necessary that the learners (are enabled to) take over (joint) responsibility for their own learning. On the one hand the learners have to recognise and experience fields of learning, in which collaboration is possible and desirable. On the other hand the advisors have to accept the learners as mature and responsible adults and actually hand over parts of

PRINCIPLES FOR ORIENTATION

1

Orientation on the participants as a didactical principle means real division of responsibility for the learning/training process

2

Orientation on biography as a precondition for self organisation in learning, but the intensity being dependent on the specific situation of the learners

3

Ensure biographical continuity in learning and life by giving opportunities for learners to progress to more advanced but connected courses

4

Orientation on competencies so problems can be accepted and taken seriously

5

Orientation on reflection as looking backwards and forwards (related to learning as development of technical, social and personal skills as well as of learning competence)

6

Orientation on participation particularly through transparency and interaction

7

Orientation on the process as shaping (new) principles of learning consultation

8

Orientation on the interests of the learners without going astray into a pedagogy of needs

the responsibility for the learning process to the participants – which at the same time means considering them capable of it, trusting them to handle it and even demanding it. During the process the balance between supplying expert knowledge and offering consultation on reflection for an autonomous acquisition of knowledge has to be found anew again and again.

Principle: Orientation on biography

A way to make existing competences and skills visible and thus usable is reflection on the (learning) biography. This allows learners to analyse both their positive and negative learning experiences and their affiliated role models, which often greatly affect current learning. Orientation on biography also means that the advisor looks at the learners against the background of their (learning) biography and so becomes able to detect their potential as well as to explain resistance or blocking behaviour and possibly even to unblock them and turn them to positive advantage.

Principle: Ensure biographical continuity

On the one hand, learning must refer to past experiences of life and occupation – new knowledge gets connected to old knowledge. Biographical reflection is therefore an important component of CoL. On the other hand, learning must make one think something new into the future – new knowledge increases professional competence and opens up new possibilities. Tagging learning interests and identifying training goals serve the development of subjectively (that is: biographically) meaningful perspectives. In the light of increasing biographical discontinuities it is a concern of CoL to filter out and strengthen a sheltering biographical baseline. An awareness of biographical continuity seems to become a central condition for handling the high pressure for adaption and the rapid invalidation of professional knowledge in order to face the future fearlessly and actively.

Principle: Orientation on competences

An awareness of one's own competences and skills is a further precondition for responsible participation by learners. So CoL focuses on the biographically acquired abilities of the learners and not on their deficits and difficulties. The latter also have to be worked on, but they do not form the starting point for learning. For advisors it becomes crucial to face their participants with a "view for competences", which means to break open the predominating deficit orientation in favour of a positive mental attitude (see Rogers 1989, Epping 1998). Thus they can bring the existing competences and resources to their own and their learners' minds and appreciate them as a source of energy for individual and group processes.

Principle: Orientation on reflection

In CoL reflection on learning experiences is considered a central component of learning. The exploration of individual learning experiences and resources, constructive reflection on the current learning situation and the purposeful direction of the learning process are based on individual and collective reflection. A close interlocking between self-reflection and collective reflection in the group makes learning a dynamic interactive process. Reflection serves as a bridge between past, present and future, it signifies a pause in order to orient oneself (again), to pinpoint the current position. For the learning/training process reflection means to connect the current learning situation with vocational goals and individual life perspective. By reflecting on past learning phases, the following phases can be planned. Reflection phases thereby serve the integration of technical and methodical and/or social learning processes.

Principle: Orientation on participation particularly through transparency and interaction

Participation refers to the degree of co-determination and co-decision by learners in the learning/training process and forms the central quality criterion of SDL. The willingness to participate is usually the higher the more of the relevant conditions, factors, possibilities and limitations are known to all involved. Orientation on participation is closely connected to transparency and interaction.

Transparency in the sense of comprehensibility of the learning/training situation – regarding organisation, contents, methods and media – is the precondition for active participation by the learners. Learners willingly take over responsibility for the individual and the collective learning process, the more they see through, decode and comprehend the learning/training situation. **Interaction** hereby refers to communication processes, by which the learning/training situation in its whole is negotiated.

The intention is to include and render effectuality to the potentials and competences of all involved in the process. Opening fields of interactive participation proves to be a particularly big challenge for training providers, since this interaction between learners and advisors requires openness also at the institutional level. Structural limitations of responsibility and decision making show up here very frequently, which are to be put in question when implementing CoL.

Principle: Orientation on the process

In addition to a deliberate handling of individual and collective learning processes, CoL needs a certain openness towards the process. Without sliding into aimlessness or

randomness, re-directions and re-decisions have to be possible. A process thereby does not become "result-arbitrary", but the results from a process emerge in a different way than, for example, in closed curricula with goals defined beforehand. Furthermore, a professional view of the process can offer learning stimulations, which lie beyond the preplanned learning opportunities, which are brought into the situation by the participants, which develop in social situations and therefore most likely correspond to immediate interests and needs. Process-open concepts can be an excessive demand on all involved, so basic dimensions for orientation must be provided and the results from the process must be made transparent.

Principle: Orientation on the interests of the learners

The principles of orientation on the participants, on participation and on the process are strongly related to another factor focusing on the learners: Orientation on the (learning) interests of the participants. These form the starting point for decisions on didactics and contents. For the learners, the tagging and wording of reasonable interests is a precondition for the definition of individual goals and is closely connected to the setup and/or the maintenance of motivation – learning interests are a much stronger and longer lasting incentive to learn than all external stimulations. Transparency of the different personal interests is the precondition for their balancing in the group – then learning settings can be arranged jointly and all those interests can find appropriate consideration. Balancing interests is not synonymous with their standardisation, but rather describes the recognition of the value of a variety of interests, whereby self-directed learning is supported.

These principles are accented differently among those involved (learners, learning advisors and educational institution) according to the specific context.

Elements providing for structure

The principles find context-specific application via a broad variety of didactical-methodical elements

Instruments and procedures for biographical, pinpointing reflection and the development of goals:

e.g. learning diary, goal training, portfolios, methods of learning biography

Instruments and procedures for collective reflection for the planning of individual and collective learning processes:

e.g. learning conference, planning conference, practice attendance

Media and materials for self-directed learning:

e.g. pool of learning sources, learners' library, access to the "teachers' library"

Instruments and procedures for the assessment of learning results in the social setting:

e.g. feedback and technical reflection, evaluation of learning and the learning/training setting, self-evaluation, learn- and work-contracting

Need-oriented consulting opportunities

e.g. learning consultation

Flexibilisation of learning times, places, variance of learning styles and methods

e.g. self-learning times, self-organising groups, collegial consultation, work on cases, project work, project management, time account, modularity.

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3 SPECIFICATION OF DIFFERENT TARGET GROUPS

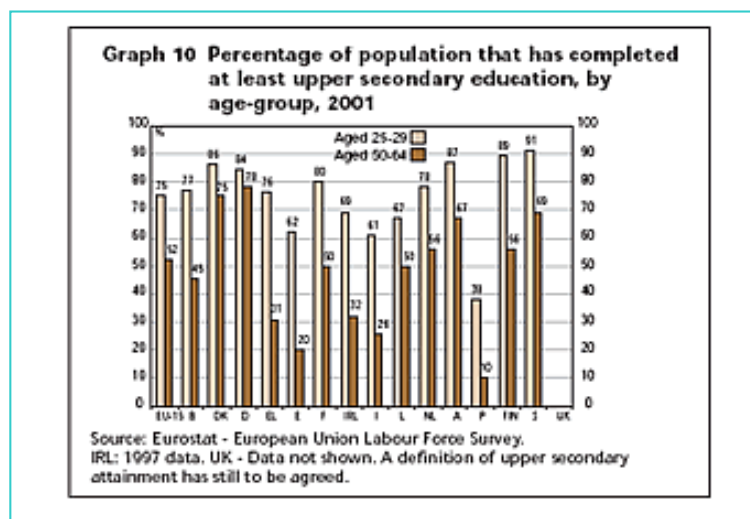
Low-skilled and disadvantaged people often suffer from barriers to (lifelong) learning, which are related to the motivation to learn, the aptitude to learn and the assessment of the possible benefits of learning or the lack of a training course that matches their interests and their capacities. They are therefore likely to remain inactive after the training and many of them will attend subsequent training measures rather than start active job search.

The concept of self-directed learning offers a chance to overcome these individual barriers to lifelong learning. Therefore the target groups benefiting directly from the outcomes of the project “Lern.Empowerment” are multifaceted.

- There is a broad range of potential users as key actors, training organisations as well as trainers, adult educators and teachers throughout Europe, who are empowered to deliver training themselves and to disseminate the idea and the concept of self-directed learning, its principles, tools and methods.
- This chapter focuses on the beneficiaries, on adult learners, who are low-skilled and unemployed and often belong to socially disadvantaged groups such as working-class people with limited schooling, single parents, women, migrants, elderly people, disabled people and residents of rural areas who, due to their situation, have difficulty gaining access to adult education programmes.

Attainment levels of the population have improved significantly over the last thirty years, particularly among women.

Today 75% of young people aged 25-29 in the Union have an upper secondary qualification. At the same time, however, 19% of people aged 18-24 leave the education system with only lower secondary education at best.



Furthermore school education continues to produce people who are inadequately equipped and unprepared for lifelong learning and adult education tends to replicate the school system and therefore fails to attract low-skilled individuals.

Opposing traditional learning biographies

This innovative approach and the implementation of the concept of self-directed learning into vocational education and training oppose traditional learning biographies.

The concept of self-organised learning necessarily implies intensive confrontation with the individual. Individual patterns of behaviour, biographies, learning targets and methods have to be considered in every single case. Self-directed learning therefore is necessarily to be accompanied by a continuing professional coaching, tutoring and counselling in order to identify personal weaknesses and strengths, to meet the actual needs of learners, to define realistic targets etc.

SDL is based on an individualised approach

The experience within the partner consortium has proved that the individualised approach has the ability to effect a change in learning attitudes, behavioural patterns and motivation for learning. The reflection on the (learning) biography is a way to make existing competences and skills visible and thus usable. This way lets learners approach their positive and negative learning experiences and the affiliated role models, which usually greatly affect current learning.

Orientation on biography also means that the advisor looks at the learners against the background of their (learning) biography and so becomes able to detect potential as well as to explain resistance or blocking behaviour and possibly even to unlock these and turn them around in a positive way (compare chapter 2, SDL-Principle: Orientation on biography).

The individualised approach to developing and increasing qualification, skills and competences was jointly valued as a basis for the learners' re-integration into the world of work.

The more self-direction, the greater the chance to develop into an emancipated personality

Experience has also shown that when aiming at something based on an personal interest, people do not differ fundamentally, so the concept of self-directed learning is not to be estimated as simply a target group oriented approach.

3. SPECIFICATION OF DIFFERENT TARGET GROUPS...

Some individuals (members of the selected target groups) of course needed particular forms of assistance and support to adopt the principles of SDL. But besides the issues of the target group related aspects, some further characteristics turned out to be even more important.

- People **unfamiliar with education** first of all need orientation and supporting elements in order to structure their individual and collective learning processes and to clarify the necessary responsibilities and commitments.
- It is asking too much of people unfamiliar with collective processes to force them to integrate straight away. Aspects of diversity, of gender, age etc. have to be taken into consideration. Nevertheless, trainers, tutors and coaches should not, of course, lose sight of the **goal of integrating people** into collective learning processes. In order to facilitate self-organisation and self-direction in the learning process, it is necessary that the learners are enabled to take over responsibility for their own learning. The learners have to recognise and experience fields of learning in which collaboration is possible and desirable ("Principle: Orientation on the participants - division of responsibility and facilitation of self-responsibility" compare chapter 2)
- **Patterns of disability have changed.** There are fewer victims of warfare on the one hand compared with those who fall victim to violence, accidents, poor working conditions, illness or stress, as well as those suffering inherited, congenital or other illnesses or disabilities. Many of these neither desire nor are capable of paid work; some, however, are both able and willing to enter or re-enter the labour force, given the chance. For these, an individualised concept of learning may be indispensable.
- Disabled people are often heavily **influenced by their surroundings**, especially in terms of values. The values of the non-disabled are held up to them as worth striving for, even where these can never be translated in their case into realisable goals. Since a "self-image" actually based on disability would therefore be a considerable emancipation, this has to be taken into account concerning the biographical work and phases of self-reflection within the concept of self-directed learning.
- The **attitude towards lifelong learning** has to be realised in its relation to education level, sex and age. EU-wide, 8% of the population aged 25-64 participated in education/training (in the last four weeks) in 2001. Such training activities seemed to be more prevalent in the Nordic countries, the Netherlands and the United Kingdom. Older people were less likely to receive training than younger

people. Women were more likely than men to participate in such training, higher qualified people more than the low-qualified (compare the following chapter).

- The **attitude towards the use of ICT** also counts among those components that contribute to the individual process and the degree of adoption. Since self-directed learning offers a variety of flexible tools, those attitudes can be taken into consideration and accordingly integrated into the didactic schemes of self-directed learning courses.
- Concerning their interest in ICT and training adult learners could be clustered as following.

CLUSTERING STUDENTS VIA MOTIVATIONAL FACTORS

	Interested in training	Distant from training
Distant from ICT	- +	- -
Interested in ICT	+ +	+ -

- “++ Participants” - people interested in ICT and training may be positively motivated. This will probably affect the learning process in a positive way.
 - “+ - Participants” - people who are interested in technical matters but are distant from training may explore ways of accessing training and therefore overcome their barriers. The integration of ICT in that case could support a developing interest in training.
 - “- + Participants” could vice versa develop a new interest in ICT.
 - “- - Participants” have to get support by exploring different ways of self-directed learning, which may be connected to their personal experiences and interests.
- People who are affected by the problem of **functional illiteracy** also do not represent a homogenous group, but are represented in different target groups:

3. SPECIFICATION OF DIFFERENT TARGET GROUPS...

Affected migrants/refugees for example are often people who actually got little or even no school education in their home countries. This means that they are not only confronted with a language problem in their new country, but are actually unable to read and write at all in their first language.

- In any case, **migrants/refugees are confronted with various problems.** Working with people of this target group, it is definitely of importance to know about all their special difficulties:
 - insecurity about their status
 - public ignorance of their status and misconceptions fuelled by ill-informed media coverage
 - public ignorance of reasons for leaving their countries
 - lack of recognition of qualifications and previous experience
 - their lack of knowledge about the systems in their new country of living
 - separation from family and friends (isolation)
- **Rural areas** are here defined as areas with low population density and poor access to urban areas, either because of distance or lack of affordable transport. Although rural areas, especially those within commuting distance of cities, are often affluent ones, national studies show that 25% of rural families live on or below the poverty line. Living in generally affluent areas means there is a lack of support services, public transport and childcare - and if guidance provision in urban areas is patchy, it is almost non-existent in rural ones, though very necessary. All member states participating in this study (and most which are not), however industrialised and urbanised, have rural populations which, though increasingly a minority of the total population, have particular difficulties of access and need special provision. There is frequently a scarcity of jobs in rural areas and other types of economic participation require identification.
- **Single parents, family women and others with caring responsibilities** remain one of the largest groups who are workless and want to work. They often face a combination of low skills, lack of work experience, poorer health and inflexibility in the hours available for them to work, as well as practical difficulties in making alternative caring arrangements. People with caring responsibilities are especially affected by the particular difficulties of living in rural areas. Working with members of this target group SDL training measures therefore should display a broad range of flexibility in time and place (compare chapter Gender Mainstreaming).

SOURCES:

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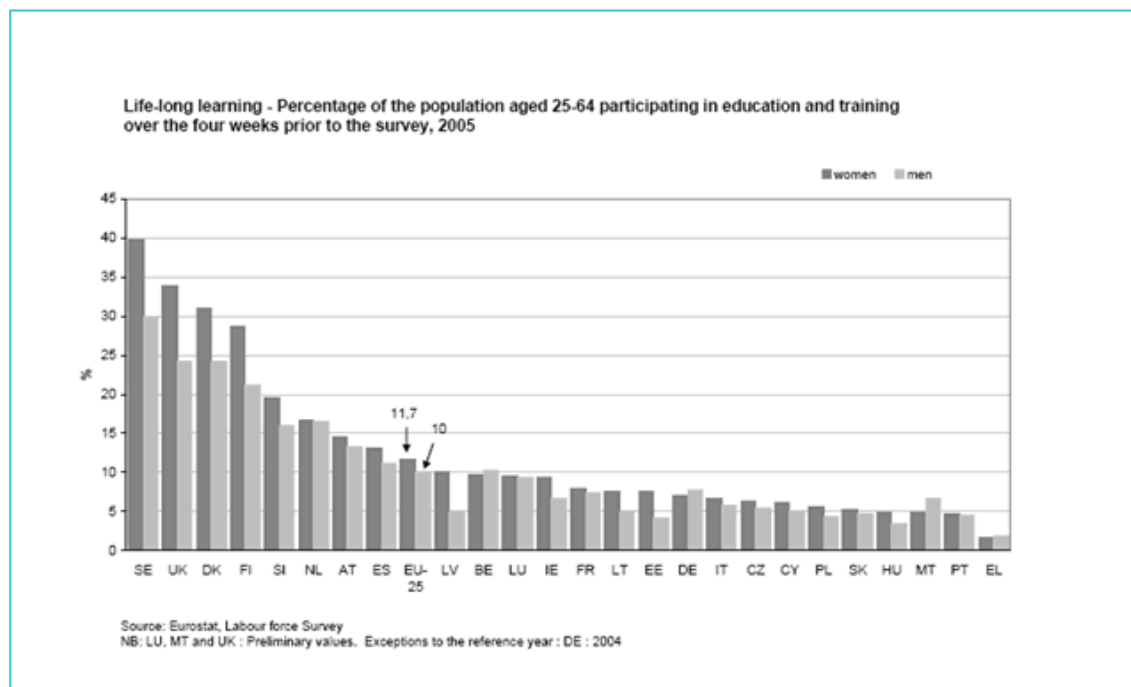
European Commission Report on equality between women and men, 2006, Catalogue No. KE-AJ-06-001-EN-C

4 WORKING WITH LOW SKILLED AND UNEMPLOYED

Investigations have shown that long-term unemployed people do not fully benefit from participating in traditional training:

- They receive knowledge and/or skills which they do not need
- They cannot cope with the presentation of learning content
- They are not motivated and flexible enough to adjust their newly acquired knowledge to their future work situation
- Because they remain unemployed, they are sent on another course and subsequently, a third course etc. They show a "training course career" instead of job career.

Whereas concepts for self-directed learning exist for higher education (post-graduates, university education, eLearning and management training), self-directed learning rarely offers concepts for training low-qualified individuals.



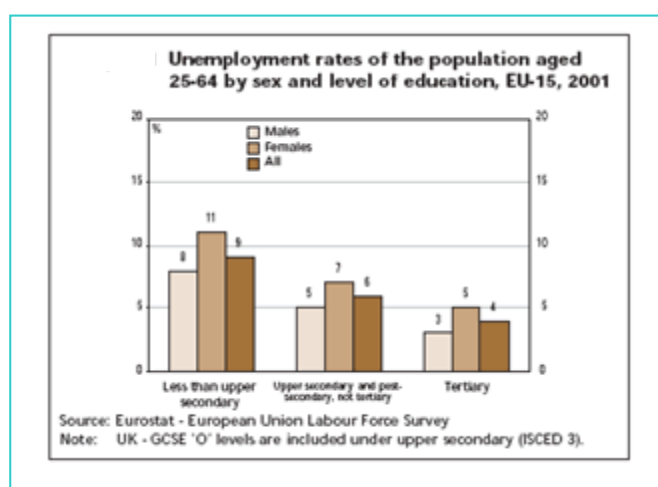
A commentary on work being pursued at the interface of economic, employment and

social policies by the Organisation for Economic Co-operation and Development (OECD) states that *"special efforts are required, however, for those who leave school early and those who have low levels of qualifications. This draws attention to the importance of recognising the learning that occurs outside formal educational institutions. Adults with low qualifications can benefit from mechanisms that validate what they have learned through experience and self-directed learning on and off the job."*

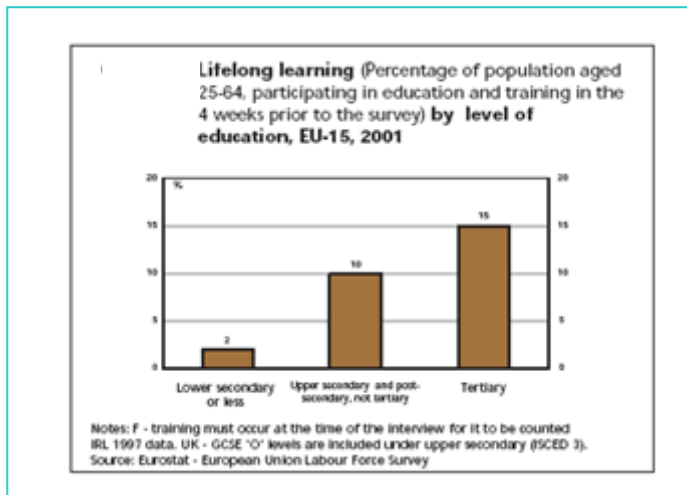
The European Training Village stated that *"staff at all levels have to learn to adjust and function in new situations and to see themselves as part of the overall production and business process. This calls for personal initiative, network thinking and the ability to resolve conflicts constructively, it also requires creativity and vision. But where and how can all this be learnt? How does one learn to cope with unexpected situations? What learning concepts are available to assist the process? What kind of techniques can be used to set people on the road to self-directed learning?"*

The World Bank remarked on the necessity *"to facilitate self-directed learning (at school, at home or at work) and to facilitate assessment of prior and informal learning to enable the student to find his or her own starting point and to introduce their own content/experience."*

Throughout Europe, providers of labour market oriented training complain that their innovative solutions are unlikely to be transferred into the regular course scheme because they are bound by inflexible contract regulations. There is an urgent need to involve the decision makers of the funding organisations (ministries, labour office etc.) into the innovation process and to modify the funding policy in such way that tender specifications allow for new didactic approaches.



Low-skilled women are at highest risk of unemployment.



EU-wide, 8% of the population aged 25-64 participated in education/training (in the last four weeks) in 2001.

Experiencing failure in the world of work

Experience has shown that long-term unemployment often goes along with a loss of self-confidence, which can also lead to apathy. The longer an individual is unemployed the more likely it is that their worklessness will continue. Operating SDL training courses the Learn.Empowerment project partners reported on many students showing attitudes and behaviour typical of "victims" who more and more regard themselves as determined by and dependent on someone else's decisions concerning their professional situation and future.

Working on learners' self-esteem and supporting them to be aware of their individual strengths was identified as a necessary basis for taking responsibility for their own development in life. This was, for example, made possible by reflecting on one's own learning biography, or by analysing and questioning learning methods, learning techniques and necessary frameworks for learning (compare: Learn.Empowerment TOOLBOX, chapter 3: Best practice).

Within the framework of a concept of self-directed learning students therefore have to be continuously coached, accompanied and supported by administrative staff and pedagogical experts. People with limited schooling, single parents, women, migrants, elderly people, disabled people and residents of rural areas - every student should be timetabled to undergo counselling sessions on a regular basis and to be provided with individual coaching throughout the process of learning. Social anamnesis is an essential part of counselling in every case. Important personal data collected during the first contact sessions serve as an important basis for counselling. On this basis learning experts are well able to assist low skilled and long-term unemployed learners to overcome typical barriers by finding out their own style of learning and working, to define individual targets and personal criteria for success.

Supported by their trainers, learners should permanently review their own learning progress and, if necessary, change and adapt their ways of learning. Developing individual competence portfolios turned out to be a good means of support, since very often people belonging to the target group of long-term unemployed are not (or no longer) aware of their own competences and skills.

SOURCES:

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EMPLOYABILITY

In today's changing workplace, one of the most valuable lessons to learn is the importance of continuously developing skills beyond those required for the performance of a specific job. Some competencies, identified as "employability skills," are the key to sustainable labour market integration because they enable individuals to prove their value to an organisation.

These competencies include technological literacy, knowing how to learn, mathematics, computer literacy and the skills of communication, organisation, problem-solving, sensitivity, judgment, adaptability, personal management, team work and leadership. Other job survival necessities are a good work ethic, evidence of maturity, dependability and an ability to concentrate and stay on task.

Defining employability skills

- Skills having the credentials necessary to practise an occupation (Zollingen,1995)
- The skills required for maintaining employment in the 21st century's economic enterprise system (Cooble,1996)
- The combination of factors and processes which enable people to progress towards or get into employment, to stay in employment and to move on in the workplace (Effective Interventions Unit in the Health Department, UK)
- These are skills most required by employers; they create employability and career opportunities (Lauzackas, 2005). (The skills of employment and sustaining the workplace)

Summarising these definitions of employability skills it is possible to see the essential similarity in each definition. All the authors speak about external requirements and continual adaptability. Therefore the assumption can be made that external requirements can be forced by conditions specifically aimed at concrete jobs or activities and that adaptability expresses some individual experience and is a more person-related feature.

Employability skills are always discussed in the context of general competences. The Secretary's Commission on Achieving Necessary Skills, SCANS's framework for solid job performance, defines five competencies and a three-part foundation of skills and personal qualities that are needed:

Workplace Competencies:

- Resources – knowing how to allocate time, money, materials, space and staff.
- Interpersonal skills – can work in teams, teach others, serve customers, lead, negotiate and work well with people from culturally diverse backgrounds.
- Information – can acquire and evaluate data, organise and maintain files, interpret and communicate and use computers to process information.
- Systems – can understand social, organisational and technological systems, monitor and correct performance and design or improve systems.
- Technology - can select equipment and tools, apply technology to specific tasks and maintain and troubleshoot equipment.

The economist Dieter Mertens introduced the term *Schlüsselqualifikationen* [key qualifications] in Germany in a pioneering article in 1974. He suggested that by devoting more time to key qualifications and less time to the acquisition of specific knowledge in vocational education curricula, problems concerning the interface of education and work could be reduced. This was because key qualifications would, first, increase employees' mobility (e.g., when entering the labour market or changing jobs) and second, because employees would be better able to respond to future developments that are not entirely predictable (e.g., when changes occur within jobs). Mertens distinguished four types of key qualifications:

- *Basisqualifikationen* [basic qualifications], cognitive qualifications of a higher order with a vertical transfer value in accordance with specific the requirements of the particular occupation or of society (e.g., logical, analytical, structured, associative and contextual thinking; critical thinking using argumentation and discussion; cooperative behaviour by mastering certain social rules and techniques).
- *Horizontqualifikationen* [horizon-broadening qualifications], e.g., being familiar with information, including knowledge about what information is, and being able to gather, understand and process information.
- *Breitenelemente* [broad elements], qualifications that cover a wide field and occur in broad occupational groups (e.g., knowledge of technology and knowledge of the ARBO [Working Conditions] Act).
- *Vintagefaktoren* [age factors], which remove intergenerational educational differences (for instance, programming techniques) through adult education.

4. WORKING WITH LOW SKILLED AND UNEMPLOYED...

What key qualifications appear to have in common is that they become obsolete (unusable) less rapidly because they are more abstract, can be used in different jobs and have transfer value. Key qualifications increase both the mobility and adaptability of employees. Employee adaptability increases because of a better ability to cope with unexpected problems or changes. Furthermore, employees who have key qualifications would be better able to evaluate their own work and, if necessary, exercise their initiative in order to improve it. In brief, key qualifications should make it possible for vocational education to train flexible, broadly-skilled employees, who can respond rapidly and effectively to changes in their work and on the labour market.

In her book entitled *Teaching Workplace Skills*, Koffel argues "that educators spend much time discussing theories, sharing knowledge, experimenting and searching for concepts, while employers who hire students who graduate from our educational system want to see results and want their employees to be able to do something with their knowledge". A survey conducted in Texas requested employers' perspectives on employability in the manufacturing sector. Individual skill statements were subdivided into nine skill categories. Each category contained the following introductory phrase: "High school graduates employed by this company should have basic skills sufficient to..." This support rendered employability skills the second highest skill category of nine.

EMPLOYER SUPPORT FOR EMPLOYABILITY SKILLS REQUIRED

Skill Statement	Weighted Average
Demonstrate punctuality	1.96
Maintain regular work habits	1.94
Maintain quality standards	1.94
Take pride in one's work	1.86
Practise a healthy lifestyle	1.66
Have a knowledge of the company	1.51
Participate in community/civic activities	1.14

Scale rating system: 0 = skill not required; 1 = skill desired, but not necessary; 2 = skill absolutely required.

Three statements (demonstrate punctuality, maintain regular work habits and maintain quality standards) were skills absolutely required for employment by greater than 90% of the employers. About 88% of the respondents felt that taking pride in one's work was an absolute hiring criterion for employment. Greater than 50% of employers absolutely required that graduates practise a healthy lifestyle and have knowledge of the company for which they will be working.

Empowerment via orientation on competences

An awareness of one's own competences and skills is a precondition for employability. SDL

concepts focus on the acquired abilities of the learners. For advisors it becomes crucial to face their participants with a “view for competences”, which means to cast aside the predominating deficit orientation in favour of a positive mental attitude, so that they can bring existing competences and resources to their own and their learners’ minds and appreciate them as a source of energy for individual and group processes.

Instruments of assessment are traditionally mostly used by teacher/tutor to evaluate the learning of learners, while SDL approaches also try to stimulate learners to evaluate their learning by themselves. Assessments can be used before, during and after a learning process. Instruments of assessment can be distinguished between self-assessment (a learner evaluates her/his learning by himself) and external assessment (a tutor or another learner [peer assessment] evaluates the learning of a learner).

Evaluating learning processes

Methods/tools of SDL use both approaches and they often combine self-assessment and external assessment. There is a range of instruments of assessment in SDL approaches. These instruments are different from the traditional forms of written or oral tests. An assessment strategy comprises the rationale, the management of assessment and the forms and methods used across a programme of learning.

The assessment strategy should be appropriate to:

- the aims of the programme;
- the targeted learners;
- the level of learning.

Assessment methods refer to the tasks to be undertaken by learners and the ways in which tasks may be marked and recorded by assessors. Any assessment strategy should include a variety of assessment methods, adapted as necessary to the needs of the target group and the curriculum.

Assessment methods include:

- observation of activities in the learning environment, such as role play, simulations, practical activities, discussion, performance;

4. WORKING WITH LOW SKILLED AND UNEMPLOYED...

- questioning, oral or written, informal or formally structured;
- structured tasks undertaken in the learners' own time, such as a project, a practical exercise, an essay, a case study or assignment, production of a video, CD ROM, exhibition, show, display;
- structured tasks or tests undertaken in timed conditions, such as written, oral or practical examinations.

All assessment methods should be:

Valid

Assessment should measure what it claims to measure and what it is important to measure; in other words, there should be a close fit between the assessment method/s and the learning outcome/s. For example, if the learning outcome is to be able to design a poster or a marketing campaign, an essay is an invalid assessment method. However, if the learning outcome is to understand how to write a report, then the writing of a report is a valid assessment method.

Reliable

The assessment result should be replicable and consistent either under different circumstances, or with a different assessor. Assessment methods should be appropriate for the form of assessment. For example, an initial assessment should build confidence and not deter a learner from appropriate progression.

Inclusive

Assessment methods should not raise unnecessary barriers to the demonstration of achievement. For example, a dyslexic learner should not be asked to produce a timed assignment without support.

Evidence can be tailored to the needs of individuals or groups and should always be flexible, varied and appropriate. Therefore, a learner with physical difficulties may provide visual or oral evidence – photos, tapes, videos – rather than the notes and reports produced by the rest of the group.

- To deliberately handle our innate and acquired learning abilities we call "learning competence". Understood as the ability to manage a learning process it comprises among others the ability to determine learning goals autonomously, to take control over learning methods, to organise basic conditions of learning in a self-directed way (e.g. learning times and locations) and to evaluate the results of learning.

Learning competence develops and changes in the context of the individual learning biography. Process-guiding concepts of self-directed learning allow for a reflexive

handling of this biography and the acquired abilities. It promotes the discovery of existing (learning) potential and their advancement in the context of the ongoing learning process.

Thus the learning competences of the learners and the advisors involved are advanced.

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5 CONSIDERATION OF GENDER MAINSTREAMING ASPECTS

Gender mainstreaming aims at the equal treatment of men and women. It is a strategy aiming at equal representation and participation in the wide range of our societies' activities, such as decision-making processes, the management of companies, the labour market, education and training etc. Research from around the world has shown that gender inequality tends to slow economic growth and makes the rise from poverty more difficult. Gender mainstreaming also aims at overcoming gender inequality concerning the resources of our society, such as the high level of the gender pay gap, the gender segregation in the labour market, the imbalance of leisure time at people's disposal and care responsibilities.

Gender mainstreaming aspects are to be considered right from the planning stage of a measure, a project or a programme to implementation, from research to evaluation, by addressing the persistence of gender roles and providing the right combination of instruments to ensure equal opportunities.

Gender Mainstreaming in the European Union

"Gender mainstreaming is the integration of the gender perspective into every stage of policy processes – design, implementation, monitoring and evaluation – with a view to promoting equality between women and men. It means assessing how policies impact on the life and position of both women and men – and taking responsibility to re-address them if necessary. This is the way to make gender equality a concrete reality in the lives of women and men creating space for everyone within the organisations as well as in communities - to contribute to the process of articulating a shared vision of sustainable human development and translating it into reality."

The European Union is committed to gender mainstreaming. Gender equality is a fundamental right, a common value of the EU and a necessary condition for the achievement of the EU objectives of growth, employment and social cohesion.

This long-standing commitment to promoting gender equality has been enshrined in the Treaty since 1957. Integrating equality between women and men into all Community policies and activities defines the gender mainstreaming approach. It was adopted in 1996 and the Commission intends to operationalise and consolidate it.

The Amsterdam Treaty was of a paramount importance. Equality between men and women is not only an explicit goal of the Treaty but its achievement is compulsory: Articles 2 and 3 state that the promotion of gender equality in all its programmes and activities is compulsory for the Union Institutions and member states.

Contrary to policies for the promotion of women, gender mainstreaming makes the principles of equal rights the basis for all policies, although persistent inequalities continue to require the implementation of specific actions in favour of women. The proposed framework strategy is based on the dual-track approach of gender mainstreaming and specific actions.

European wide implementation of gender mainstreaming – which is to be characterised as a top down strategy – counts among the central aims of the European Union. The Group of Commissioners on Fundamental Rights, Non-Discrimination and Equal Opportunities was created on the initiative of the President of the Commission, Mr Barroso, in 2005. It succeeds the Group of Commissioners on Equal Opportunities which had been active since 1996. Yearly reports present an overview of the main developments in equality between women and men in the European Union. They also outline challenges and policy orientations for the future.

Defined indicators monitor the progress towards gender equality in the policy areas identified in the Roadmap. They have been selected for their relevance to describe the situation of gender equality in the different areas, while taking into account the availability of EU-comparable data.

Developments and state of play

In spite of some improvement, the concrete application of equal opportunities is far from being considered fully achieved. There is a general lack of gender mainstreaming and impact assessment in many policies discussed or labour market oriented measures that have been already implemented. This absence of gender mainstreaming may in some cases indicate a lack of political commitment to promoting gender equality, or at least a failure to develop and implement suitable gender mainstreaming procedures.

- Gender segregation in the EU labour markets has hardly changed in the last few years, staying at around 25% for occupational segregation and 18% for sectoral segregation.
- Women dominate in sectors such as health care and social services, education, public administration and retailing, while a disproportionate number of men work as technicians, engineers, finance professionals and managers.

In some other initiatives and measures gender mainstreaming is developing but is still

uneven. Gender mainstreaming impacts are often discussed only in relation to certain target groups where it is recognised either explicitly or implicitly that women predominate. Positive actions oriented on the promotion of women in the labour market are to be considered a basic principle that is integrated into the mainstream.

Falling birth rates across Europe may be one indication of the difficulties of lone parents, who count among those target groups in which women mostly predominate. Furthermore, the difficulties of reconciling work and family may be reason enough to implement gender mainstreaming and benefit from a broader gender perspective.

The problem is not only that gender discrimination continues but that also it may reappear in new forms and guises. Thus, while for women in some countries and some social positions the main problem is to gain access to the labour market in the first place, in other countries and for women in other social positions, the problem is more one of achieving greater equality within employment and converting an entry level job into a path to a sustained and rewarding career. Women's options are constrained by patterns of segregation but at the same time the desegregation of an occupation may lead eventually to new patterns of segregation, as jobs that were traditionally male become associated primarily with female labour.

Reaching equality implies the same chances for unemployed women and men aiming to enter the labour market to benefit from equal treatment within vocational training measures and the same opportunities in terms of employment, wages and civic participation.

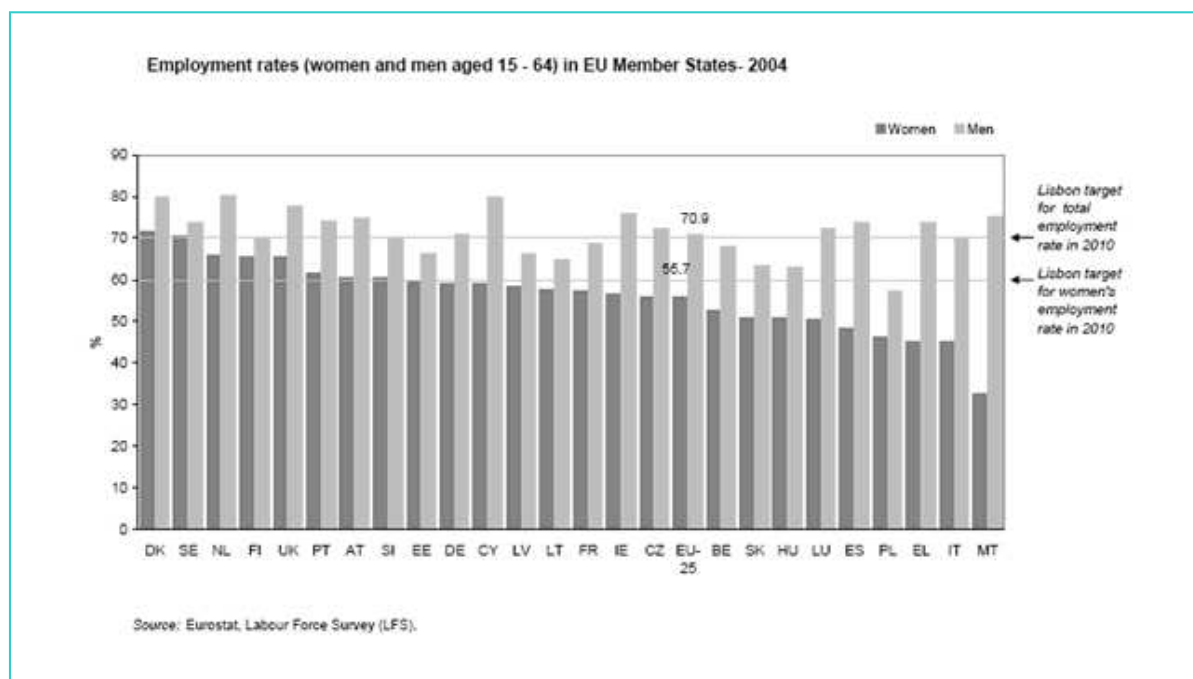
Research shows that gendered roles still largely shape the vocational development of both sexes and unless assumptions about gender roles are challenged they risk being perpetuated.

Professionals with career guidance responsibilities who are truly concerned about the long-term well-being of their clients need to be knowledgeable about the effects of gender, particularly its impact on the vocational development of their target groups. They need good quality training on aspects of gender mainstreaming. Gender competence should be a prerequisite for guidance workers in charge of counselling and training.

Requirements of the Labour Market

Experience of the European Framework Strategy for equality between women and men for the period 2001-2005 has shown that gender policies contribute to employment and growth. Three quarters of the new jobs created in the last five years in the EU have been

filled by women. Yet the persistence of gender gaps underlines that more can be done to improve the productive potential of society. Poor reconciliation of work and family in particular still drives (predominately female) workers out of the labour market, negatively interferes with access to vocational training and contributes to lower fertility rates. There is a real need to step up efforts to support effective and innovative means to help men and women reconcile work and their private responsibilities at all stages in their lives.



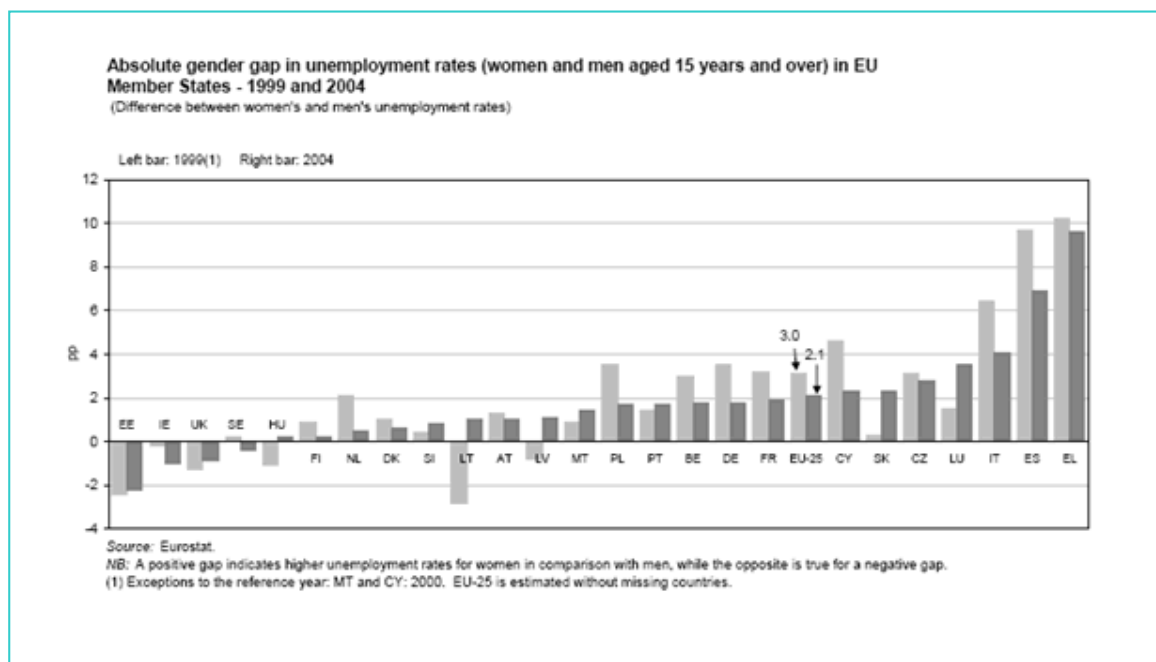
Essentially, instead of the "male model" (for example, men as main breadwinners with careers uninterrupted by caring responsibilities) being assumed to be the norm into which women, whatever their circumstances, are required to fit, it is recognised that there are many models of equal value. Furthermore, there are men who do not fit into the "male model" (for example, the long-term unemployed) and there are women who do. So this is an issue for both men and women and they cannot and should not be pigeonholed or stereotyped.

The following aims count among the gender oriented goals concerning labour market and labour market policy

- to reduce the income disparities between women and men
- to increase the percentage of women in jobs. It is intended to improve women's access to jobs as well as their career opportunities
- to increase the percentage of women in decision making and management positions

5. CONSIDERATION OF GENDER MAINSTREAMING ASPECTS ...

- to increase the percentage of women in science and technology, particularly in professorships
- to increase the percentage of men in teaching jobs in nursery and primary schools
- to increase the establishment of new businesses by women, since behind the under-representation of women in self-employment lies a great potential for new business creation and — from another point of view — the gender gap in self-employment gives reason to promote women's entrepreneurial activities.
- to increase the percentage of female apprentices for ICT and media jobs, since the percentage of women in technical occupations is still too low. Many companies complain about the low application rate of women and industry is already suffering from a lack of qualified personnel in the ICT sector.
- to widen the spectrum of the vocational orientation of young women. The interest of young women in natural sciences and technology must already be stimulated in school to encourage more females to consider training in a technology related field. Various projects have been created to support this undertaking and to work towards steering female pupils towards new jobs with good employment prospects.
- provide major opportunities for the professional development and economic independence of women.



The following impacts count among the gender oriented measures concerning labour market and training policy

- Entitlements to maternity and parental leave provide an employment integration mechanism.
- Entitlements to maternity and parental leave encourage women to enter full time jobs.
- Entitlements to paternal leave encourage men to take responsibility in questions of education and family work
- On the other hand long periods of leave can carry some risks, depending on how they articulate with other measures or national policies or labour market conditions etc.
- Entitlements to parental leave can reinforce women's second earner status – if mothers take long periods of leave
- Promotion of childcare services as a social infrastructure for supporting parents' employment (availability – costs of services – compatibility between services and working hours – quality of care)

Organisational policy

All too often, gender mainstreaming initiatives "evaporate" before implementation and remain paper commitments only. Organisational policies on gender mainstreaming must include action plans with clear procedures and targets as well as designated roles and responsibilities for promotion, implementation and monitoring. These must be based on a clear and realistic analysis and understanding of the criteria for gender oriented job placement activities and training. The neglect of gender mainstreaming in the design of many labour market oriented initiatives and measures is often replicated in flawed evaluation. So, for instance, it seems quite common for assessments to focus on the short term, more longer-term considerations of social integration, labour demand and the types of low-wage jobs being subsidised by social protection reforms. Gender mainstreaming often produces a different angle. So focus on households as an aggregate unit is often neglected, which means that the different opportunities and lifetime earnings of women and men within a gender segregated labour market are usually ignored.

Experience has shown that those organisations that created structures (such as working groups spanning various Directorates-General) to implement gender mainstreaming internally had the best success in the introduction of this policy throughout their institutions and were able to guarantee the most sustainable results.

Some of the practical ways in which gender mainstreaming can be put in place include the following actions:

- Involve both men and women in decision-making.
- Consider if the impact of your decisions impacts differently on women and men in the particular sector for which the course is aimed. For example, if more women than men work part time, any training measure almost certainly should be part time too.
- Think about stereotyped notions of "women's work" and "men's work" –women in Europe are not associated with carrying out manual labour but in the past and elsewhere in the world today it is women who carry out much of the manual labour. Nor are European women thought of as potential plumbers or electricians or computer technicians, but there is no reason they should not enter these lucrative trades. So widen your recruitment policies and re-focus your publicity to attract both sexes.
- Check vocational education and training policies and measures to see if they might impact differently on men and women. For example:
 - If courses are held only at night, or if they are in places which cannot be reached by public transport, can women attend as easily as men?
 - If courses are held in the daytime, can men who are employed full-time access them as easily as women who work part-time or are occupied in the house?
 - If the timetable is inflexible, can men fit classes into their existing timetable more easily than women?
 - Is there any provision for childcare, where women are more likely to care for children than men?
 - Do prevailing norms and values inhibit the participation of men or women in the educational programme being evaluated?
 - Look at the ratio between men and women on the course. Does the learning environment facilitate both sexes?
 - Consider carefully the language to be used: is it gender-neutral or does it imply that one sex is inferior to the other or is allegedly innately more suited to the occupation or the learning task than the other?

- When the vocational education and training measure is in progress, ensure:
 - that women and men receive equal treatment and equal amounts of the tutor's attention.
 - that generalisations about men and women are challenged and sexist jokes are not accepted.
 - the reconciliation of the vocational education/training measure and family.

The intention is to include and render effective the potential and competences of all involved in the process. Opening fields of interactive, gender sensitive participation proves to be a particularly big challenge for training providers, since this interaction between learners and advisors requires gender competences and openness also at an institutional level. Structural limitations of responsibility and decision making show up here very frequently, which are to be put in question when implementing concepts of self-directed learning.

Mainstreaming Gender Equality

- Strategic Aims of the European Union in the upcoming Period 2006 - 2010

The "Roadmap for equality between women and men" represents the Commission's commitment to driving the gender equality agenda forward. It outlines six priority areas for EU action on gender equality for the period 2006-2010. For each area, it identifies priority objectives and actions.

1. Equal economic independence for women and men
 - Reaching the Lisbon employment targets which call for a 60% employment rate for women by 2010
 - Eliminating the gender pay gap of the current average of 15%
 - Promotion of women entrepreneurs, currently constituting on average of 30%
 - Gender equality in social protection and the fight against poverty
 - Recognising the gender dimension in health
 - Combating multiple discrimination, in particular against immigrant and ethnic minority women
2. Reconciliation of private and professional life
 - Flexible working arrangements for both women and men

5. CONSIDERATION OF GENDER MAINSTREAMING ASPECTS ...

- Increasing care services
 - Better work-life balance policies for both women and men
3. Equal representation in decision-making
- Women's participation in politics
 - Women in economic decision-making
 - Participation of women in science and technology - target of 25% women in leading positions in the public sector
4. Eradication of all forms of gender-based violence
- Eradication of gender-based violence
 - Elimination of trafficking in human beings
5. Elimination of gender stereotypes
- Elimination of gender stereotypes in education, training and culture
 - Elimination of gender stereotypes in the labour market
 - Elimination of gender stereotypes in the media
6. Promotion of gender equality in external and development policies
- Enforcement of EU legislation in acceding, candidate and potential candidate countries
 - Promotion of gender equality in the European Neighbourhood Policy (ENP), external and development policies

The implementation of Gender Mainstreaming principles - Evaluating and revising via the 3-R-Method

A system has been in operation in Sweden for a number of years that has proved to be very useful for analysing differences in the gender balance. The 3Rs stand for Representation, Resources and Realia. The main message in this case is the importance of analysing the situation of women and girls, men and boys using the first two steps – Representation and Resources – by collecting quantitative data.

How many women and how many men? '**Representation**' focuses on decision-makers as well on the users who exert an influence on, and are influenced by, the measure at hand. Representation just asks quantitative questions but the answers can give a picture of the balance in participation of women and men at all levels.

'Resources' also asks quantitative questions. Information is collected on relevant resources related to the measures, the inputs and outputs. These can include time, space, attention, money, information – how are these resources distributed between men and women?

'Realia' analyses the surveys of Representation and Resources. Its guiding questions are qualitative: Why is it this way? How can the gender patterns revealed under representation and resources be explained? Are they in line with our aims – and if not, why not?

The results that emerge from the 3-R-Method are compared with the gender equality objectives of the organisation and optimise its respective activities and measures.

Key role of lifelong learning - Empowerment via SDL

Education and training play a key role in sensitising and promoting the principles of gender mainstreaming and in highlighting a gender approach in the guidance and counselling processes.

At the same time gender issues play an important role in lifelong learning.

This concerns the

- Access to learning and training courses
- Balance of work and family life
- Strategies of learning
- Valuation of success
- Motivation to learn
- "Language"
- ...

Project experience has shown that SDL proves its value concerning a wide range of gender related aspects of training processes:

Motivation to learn

Education and training continue to transmit gender stereotypes. Women and men often follow traditional education and training paths that place women in occupations that are less valued and remunerated. SDL guides the participants to take biographical insights as the basis for their learning process and further development. For the learners, the tagging

and wording of reasonable interests is a precondition for the definition of individual goals and is closely connected to the setup and/or the maintenance of motivation, since learning interests are a much stronger and longer lasting incentive to learn than all external stimulations.

Based on its principle on "Orientation on interests of the learners without going astray into a pedagogic of needs" (compare chapter 2) the individualised approach of the concept of self-directed learning mobilises female interests and strengths in particular and encourages women and men to explore non-traditional training paths. Self-directed learning is a social and interactive form of learning and allows focus on combating gender stereotypes and increasing individual competences.

Strategy of learning

Supported guidance and a selected variety of methods, SDL contains individual learning strategies and metacognitions. Reflection serves as a bridge between past, present and future, it signifies a pause in order to orient oneself (again), to pinpoint the current position.

For the learning/training process reflection means connecting the current situation with vocational goals and the individual life perspective. Through reflection on past learning phases and gender-based orientations, roles and barriers, the following phases can be planned. It reduces barriers, widens the spectrum of perspectives and potential vocational goals and promotes the individual potential of taking responsibility for the learning process (for both women and men).

Access to learning and training offers

Women still do the majority of work in the home and for the family. In addition, the reconciliation of family and work mainly counts among women's daily challenges, but educational courses and training provision have not sufficiently reacted to this fact. Thus, women's educational chances and opportunities to take up occupations that are comparable to the average occupations of men are still limited. SDL facilitates access to learning and training opportunities because it is open to flexible time frames, a variety of learning places, and different ways of learning ways.

SOURCES:

Communication from the Commission to the Council, the European Parliament, the European Economic and Social committee and the Committee of the Regions - A Roadmap for equality between women and men 2006-2010, 3/2006, //eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0092:FIN:EN:HTML

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6. RESPECTING DIVERSITY

Society can be conceptualised as a complex of diverse groups, according to social criteria such as sex, age, class, family situation, sexuality, health, sexuality, religion, ethnicity and national origin. Some of these groups hold an unequal position in the society in which they live and some are very disadvantaged. Thus people differ in many ways.

There are many definitions of diversity management and numerous terms are used to describe essentially the same thing. For instance, there are various definitions of "diversity", "productive diversity", "diversity management" and "workplace diversity". In a pragmatic sense, the common ground in these definitions includes:

- they acknowledge the reality that people differ in many ways;
- they identify implications for the workplace, or society in general, that arise because of this diversity
- they suggest or imply strategies to ensure that these issues are addressed, in the interest of the workplace, or society in general.

The term "diversity management" is usually found in the context of the business case. In order to improve counselling and tutoring processes and to contribute to the employability of students the understanding of diversity management should meet the view of entrepreneurs (see below). But the term can also be adapted to training organisations and to the delivery of counselling and vocational training opportunities.

The European Union is committed to the elimination of all discrimination and the creation of an inclusive society for all. Article 6 (1) of the treaty on European Union states: "The Union is founded on the principles of liberty, democracy, respect for human rights and fundamental freedoms ... principles which are common to the Member States." For many years the focus was on preventing discrimination on the grounds of nationality and sex. Since 1999, the Community has had new far-reaching powers to combat discrimination on the grounds of racial or ethnic origin, religion or belief, disability, age and sexual orientation. Two European laws or "Directives" banning discrimination were adopted unanimously by the European Union Member States in 2000. Each country had until 2003 to implement these rules into national law. For the provisions on age and disability, the Member States could request an extension to the end of 2006 for implementation:

"Every day across the European Union people are being prevented from participating to their full ability in work and society because of prejudice and discrimination. This is why legislation has been introduced to give people equal rights and to help tackle the barriers they face. European legislation makes it illegal to discriminate in employment and training on the grounds of religion and belief, disability, age and sexual orientation. It also prohibits discrimination on the grounds of racial or ethnic origin, in employment and training and other areas of daily life such as education, housing and healthcare" (Vladimir Špidla, European Commissioner for Employment, Social Affairs and Equal Opportunities).

Diversity aspects within tutoring and counselling processes

In seeking to understand a person's needs, interests and motivation as well as in order to strengthen the efficiency and quality of the counselling process, managing diversity involves:

1. Identifying the issues that arise from this diversity;
2. Developing ways to address these issues.

Thus, the diversity approach involves:

- recognising that people are not all the same in terms of their social situation;
- recognising that individuals have different needs, which arise partly from their social situation;
- valuing all individuals equally;
- giving all people opportunities to reach their full potential;
- and tailoring provision of these opportunities to take account of diverse needs.

PERCEPTION OF ATTRIBUTES - A CRITERIA DEFINING DIVERSITY

Noticeable	Hardly noticeable	
	Attitudes / values	Knowledge / skills
Race	Character	Education
Gender	Cultural Values	Languages
Age	Religion	Hierarchy
Nationality	Sexual orientation	Expert knowledge and competences
	Humour	Socio-economic status

Examples of people that are considered to be 'diverse' include:

- People with limited access to transport - particularly home based parents;
- Rural and isolated people;
- Shift workers who are unable to commit to or attend regular classes;
- People with physical disabilities;
- People with psychiatric or learning disabilities or difficulties;
- Older people;
- Lesbian, gay, bisexual and transgendered people;
- People from non-English/German/Italian/Latvian etc speaking backgrounds, including both refugees and immigrants;
- People from disadvantaged socio-economic backgrounds;
- Women, especially those who are carers;
- People with low literacy, numeracy and social skills
- Long-term unemployed people
- ...

Three important points to note:

1. Some individuals face multiple disadvantages;
2. Some individuals from social groups regarded as disadvantaged may have no difficulties
3. Some individuals have extremely low self-esteem.

Women members of disadvantaged groups are often worse off than their male counterparts. The situation of ethnic minority and immigrant women is emblematic. They

often suffer from double discrimination. This requires the promotion of gender equality in migration and integration policies in order to ensure women's rights and civic participation, to fully use their employment potential and to improve their access to education and lifelong learning.

“Treat others as you want to be treated” versus “Treat others like they want to be treated”

To address diversity issues, the following questions should be taken into consideration:

- What policies, practices and ways of thinking within our organisational culture have differential impact on different groups?
- What organisational changes should be made to meet the needs of a diverse learning group as well as to maximise the potential of all workers, so that we can be well positioned for the demands of the 21st century?

Most people believe in the golden rule: treat others as you want to be treated. The implicit assumption is that how you want to be treated is how others want to be treated. But when looking at this proverb through a diversity perspective, the questions that should be asked include: What does respect look like; does it look the same for everyone? Does it mean saying hello in the morning, or leaving someone alone, or making eye contact when you speak?

Individual approach

It depends on the individual. We may share similar values, such as respect or need for recognition, but how we show those values through behaviour may be different for different cultures. How do we know what different cultures need? Perhaps instead of using the golden rule, we could use the platinum rule which states: "treat others as *they* want to be treated." Moving our frame of reference from an ethnocentric view ("our way is the best way") to a culturally relative perspective ("let's take the best of a variety of ways") will help us to manage more effectively in a diverse work environment.

Being in charge of training, tutoring and counselling, one has a key role in transforming the organisational service so that it more closely reflects the values of our diverse workforce and student body. Some of the skills needed are:

- an understanding and acceptance of managing diversity concepts
- recognition that diversity is threaded through every aspect of management

- self-awareness, in terms of understanding your own culture, identity, biases, prejudices and stereotypes
- willingness to challenge and change institutional practices that present barriers to different groups

It is natural to want a cookbook approach to diversity issues so that one knows exactly what to do. Unfortunately, given the many dimensions of diversity, there is no easy recipe to follow. Advice and strategies given for one situation may not work in the same situation in another context.

Managing diversity means acknowledging the clients' differences and recognising these differences as valuable; it enhances good tutoring and counselling practices by preventing discrimination and promoting inclusiveness. It is, however, often difficult to see what part diversity plays in a specific area.

Fairness versus justice

Many people think that "fairness" means "treating everyone the same". How well does treating everyone the same work for a diverse clientele? For example, when students have limited language skills or reading skills, even though that limit might not affect their ability to qualify for their jobs, transmitting important information through complicated printouts might not be an effective way of communicating with them.

While distributing such material to all learning students is "treating everyone the same," this approach may not communicate essential information to everyone. A person who missed out on essential information might feel that the communication process was "unfair." A process that takes account of the diverse levels of understanding and reading skills might include taking extra time to be sure that important information is completely understood. Such efforts on the part of trainers and tutors should be supported and rewarded as good practices for working with a diverse learning group.

Managing diversity focuses on maximising the ability of all students to contribute to their employability and integration into labour market. Affirmative action focuses on specific groups because of historical discrimination, such as "people of colour" and women. Affirmative action emphasises legal necessity and social responsibility; managing diversity emphasises business necessity. In short, while managing diversity is also concerned with the under-representation of women and ethnic minorities in special sectors of the labour market, special positions, equal pay etc., it is much more inclusive and acknowledges that diversity must work for everyone.

Consequences of ignoring diversity

Ignoring diversity issues costs time, money and efficiency. Some of the consequences can include unhealthy tensions between people of differing sex, race, ethnicity, age, abilities, etc.; loss of productivity because of increased conflict; inability to attract and retain talented people of all kinds; complaints and legal actions; and inability to retain women and ethnic minorities, resulting in lost investment in recruitment and training.

Skills meeting employers' needs

Diversity not only involves how people perceive themselves, but how they perceive others. Those perceptions affect their interactions. For a wide assortment of employees to function effectively as an organisation, human resource professionals need to deal effectively with issues such as communication, adaptability and change. Diversity will increase significantly in the coming years. Successful organisations recognise the need for immediate action and are ready and willing to spend resources on managing diversity in the workplace now.

Benefits of workplace diversity

An organisation's success and competitiveness depend upon its ability to embrace diversity and realise its benefits. When organisations actively assess their handling of workplace diversity issues, develop and implement diversity plans, multiple benefits are reported such as:

- *Increased adaptability*
Organisations employing a diverse workforce can supply a greater variety of solutions to problems in service, sourcing and allocation of resources. Employees from diverse backgrounds bring individual talents and experiences in suggesting ideas that are flexible in adapting to fluctuating markets and customer demands.
- *Broader service range*
A diverse collection of skills and experiences (e.g. languages, cultural understanding) allows a company to provide service to customers on a global basis.
- *Variety of viewpoints*
A diverse workforce that feels comfortable communicating varying points of view provides a larger pool of ideas and experiences. The organisation can draw from that pool to meet business strategy needs and the needs of customers more effectively.

- *More effective execution*

Companies that encourage diversity in the workplace inspire all of their employees to perform to their highest ability. Company-wide strategies can then be executed; resulting in higher productivity, profit and return on investment.

- *Image - Getting known as socially responsible*

In today's complex business environment, companies are faced with very distinct and changing stakeholder expectations. In fact, the notion of who is a legitimate stakeholder in a business is broadening to encompass investors, employees, customers, partners, suppliers, regulators, neighbours, consumer groups, social institutions and communities.

Furthermore, each of these stakeholders is demanding higher standards of corporate behaviour, governance and transparency.

No longer is it sufficient for companies to obey the laws, pay taxes, be profitable and create employment. Citizens around the world - who are these very stakeholders - want companies to contribute to broader societal goals as well.

The 1999 Millennium Poll of over 25,000 average citizens across 23 countries in six continents showed that two out of three citizens felt this way. In this view of Corporate Social Responsibility (CSR), there are three essential components that combined add up to socially responsible behaviour and performance. These are:

- 1 doing business in a responsible way;
- 2 taking a leadership position in community investment and social issues relevant to the business;
- 3 transparency and public reporting of the social, environmental and financial impacts and performance of the business.

With this approach, the starting point is the way a company organises and conducts its business. It starts with the company's vision, ethics and values and extends to the way products are manufactured, marketed, priced and distributed. It encompasses every facet of the business process and value chain including:

- employment policies and practices;
- supply chain management;

- health, safety and environmental practices;
- commitment to and practices relating to human rights and diversity;
- transparency and corporate governance; and
- reporting and accountability standards, especially a commitment to triple bottom line reporting.

Effective management of diversity is an important part of doing business responsibly in relation to every one of these facets.

Managing the difference within a company's workforce

In the context of the business case, diversity management is a tool for capturing the diversity dividend. Under this angle diversity management focuses on managing the difference within a company's workforce, capitalising on the benefits of diversity and minimising workplace challenges.

Workplace diversity refers to the variety of differences between people in an organisation. That sounds simple, but diversity encompasses race, gender, ethnic group, age, personality, cognitive style, tenure, organisational function, education, background and more. The main ways diversity management produces the diversity dividend are:

- improving the efficiency of human resource management functions;
- fostering superior decision-making, problem-solving, creativity and innovation – key factors in the creation of knowledge companies;
- developing cross-cultural capabilities that facilitate operations in culturally complex environments at home and abroad; and
- implementing new product/service developments and new sales/marketing strategies for diverse customer bases.

There are two distinct but connected channels in diversity management that will lead to superior company performance. The *first channel* focuses on how to tap into the benefits that flow from effectively managing diversity. The *second channel* focuses on corrective strategies to address ineffective diversity management, which imposes costs.

Effective diversity management leads to improved individual and organisational performance. This is due to the powerful effects of diversity on problem-solving, decision-making, innovation and creativity.

However, having a diverse workforce does not, in itself, translate into bottom line benefits for companies. Diversity must be managed in order for companies to obtain a diversity dividend. Companies must commit to effectively managing diversity to ensure that the unique skills, perspectives and knowledge of their workforces are channelled into producing a diversity dividend.

Diversity and sustainability

Traditional approaches to diversity used to refer primarily to how companies addressed legislative and regulatory issues of equal employment opportunity and affirmative action related to race, gender and disability. Today, companies have expanded their understanding and approach to diversity.

Firstly, they have broadened their understanding of what constitutes difference so that diversity is about acknowledging any difference that can impact on the fair or equitable treatment of people — this can include differences in gender, race, age, culture, disability, religion, sexual orientation, or any other characteristic that helps to shape a person's perspective. Diversity in this context can encompass any way people differ.

Secondly, companies have begun to capitalise on differences and extract the value to the business that can be gained from acknowledging, valuing and developing the business opportunities that arise from this difference.

In this context, productive diversity is a strategy and approach that sees the positive opportunities for business from a diverse workforce, marketplace and supplier base. Businesses that embrace a productive diversity model take advantage of these opportunities to enhance their competitive edge and deliver value and increased returns for shareholders.

Evaluating and revising organisational policy

In order to respect diversity, it is necessary to evaluate the culture of the educational organisation by asking critical questions about its culture. Such questioning should not only be carried out by staff but should also involve students, potential students, associations representing disadvantaged groups and so on.

Questions can include:

- Does the environment enable all to reach their potential?
- Or does it make it easier for some than for others?
- What factors are likely to exclude certain kinds of people?
- What can be done to make this establishment genuinely open to all?
- How can we support students with particular difficulties without ignoring or neglecting those who appear to have none?
- Do all members of our staff value diversity? What training might be necessary?

Areas for this kind of enquiry include, for the direct benefit of learners, accessibility to courses, pre-course advice and guidance, simplification of the bureaucratic procedures involved in registration and continued access to support during the programme.

For staff, training in diversity, sexual harassment prevention, gender communications, problem-solving and conflict management need to be put in place.

Challenges of diversity

Taking full advantage of the benefits of diversity is not without its challenges. Some of those challenges are:

- Communication - perceptual, cultural and language barriers need to be overcome for diversity programmes to succeed. Ineffective communication of key objectives results in confusion, lack of teamwork and low morale.
- Placing diversity management in the context of empowerment and training programmes. A strategy must be created and implemented to create a culture of diversity that permeates every department and function of the organisation.
- Resistance to change - there are always people who will refuse to accept the fact that the social and cultural makeup of their workplace is changing. The "we've always done it this way" mentality silences new ideas and inhibits progress.

- Implementation of diversity in the organisational policies - this can be the overriding challenge to all diversity advocates. Armed with the results of assessments and research data, they must build and implement a customised strategy to maximise the effects of diversity for their particular organisation.

Recommended steps that have been proved successful in world-class organisations are:

- Successful organisations make assessing and evaluating their diversity process an integral part of their management system. A customisable satisfaction survey can accomplish this assessment efficiently and conveniently. It can help the management team determine which challenges and obstacles to diversity are present and which policies need to be added or eliminated. Re-assessment can then determine the success of the implementation of the diversity plan.
- Development of the diversity plan - choosing a survey provider that provides comprehensive reporting is a key decision. That report will be the beginning structure of the diversity plan. The plan must be comprehensive, attainable and measurable. An organisation must decide what changes need to be made and a timeline for that change to be set.
- Implementation of the diversity plan - the personal commitment of executive and managerial teams is a must. Leaders and managers within organisations must incorporate diversity policies into every aspect of the organisation's function and purpose. Attitudes toward diversity originate at the top and filter downward. Management cooperation and participation is required to create a culture conducive to the success of the organisation's plan.
- Recommended diversity solutions include:
 - Ward off change resistance with inclusion. Involve every person possible in formulating and executing diversity initiatives.
 - Foster an attitude of openness in the organisation. Encourage colleagues to express their ideas and opinions and attribute a sense of equal value to all.
 - Promote diversity in leadership positions. This practice provides visibility and realises the benefits of diversity.
 - Utilise diversity training. Use it as a tool to shape the diversity policy.
 - Launch a customisable satisfaction survey that provides comprehensive

reporting. Use the results to build and implement successful diversity policies.

- Evaluate the organisation's diversity policies and plan for the future, starting today.

SOURCES:

EC Directive 2000/43/EC of 29 June 2000 implementing the principle of equal treatment between persons irrespective of racial or ethnic origin

EC Directive 2000/78/EC of 27 November 2000 establishing a general framework for equal treatment in employment and occupation

Combating discrimination in the European Union, European Commission 2006, Catalogue No. KE-72-05-580-EN-C

For Diversity. Against Discrimination. European Commission's website on anti-discrimination which serves as a source of information on the EU-wide campaign, www.stop-discrimination.info

GLOSSARY

The following glossary contains some 20 terms relating to the concept of self-directed learning, highlighted by the partnership.

- **Action plan**

An action plan is a set of individualised written instructions and goals, designed mostly with a tutor, that detail how a learner should manage his or her learning in order to achieve central goals.

- **Assessment**

Instruments of assessment are traditionally mostly used by a teacher/tutor to evaluate the learning of learners, while SDL approaches also try to stimulate learners to evaluate their learning themselves. Assessments can be used before, during and after a learning process. Instruments of assessment can be distinguished between self-assessment (a learner evaluates her/his learning by himself), peer assessment (learners evaluate each other's work) and external assessment (a tutor evaluates the learning of a learner). Methods/tools of SDL use all these approaches and often combine self-assessment and external assessment. Instruments of assessment are rather diverse for SDL approaches (e.g. portfolios or assessment centers). These instruments are different from the traditional forms of written or oral tests

- **Bilans de compétences**

The 1985 law on the *bilans de compétence* introduced a system for the validation of professional competences acquired outside formal education in France. The initiative for a *bilan* may come from the enterprise or from the worker him/herself. This right was strengthened through the Law of December 1991 which states that employees are entitled to educational leave (24 hours or three working days) for the *bilan*. The aim of the *bilan de compétence* is, according to the Law of 1991, to permit employees to understand their professional and personal competences as well their motivation and aptitudes in order to facilitate their professional as well as their educational plans and careers. But while "external tests" as well as outcome-based assessments are intrinsically linked to the national systems of formal education and training, the *bilan de compétence* is focused on the labour market and on enterprises. As stated in an official statement on the purpose of the *bilan*: "The user of the *bilan* should, through confrontation with the occupational context (the context of the enterprise or the labour market in general) and his or her own abilities, be enabled to make

occupational priorities, make better use of his or her strengths in career developments. In general make maximum use of his or her own resources."

Methodological approaches vary considerably, because methods used depend on the *centres de bilan* who are in charge of the *bilan*.

- **Diversity Management**

A workplace diversity programme (also known as a "diversity strategy") is designed to create an equitable employment system for all employees. Such a programme includes both policies and practices. Globally, workforces have become more diverse because they have included increasing numbers of the following groups of people: immigrants (and those who speak foreign languages), representatives of a minority religion or ethnic group, people of various sexual orientations, members of unconventional family structures, including single-parent families, older people, people with disabilities, etc. Organisations who implement workplace diversity programmes are concerned about the diversity of a global customer base. Foreign language and culture skills, ingenuity, humour and careful listening are examples of traits that workplace diversity programmes typically require. It would appear that these evidence a general shift to the human capital point of view and an acknowledgement that human beings contribute much more to a productive enterprise than "work": they bring their character, their ethics, their creativity, their social connections, and in some cases even their pets and children, and alter the character of a workplace.

- **Employability**

The combination of factors and processes which enable people to progress towards or get into employment, to stay in employment and to move on in the workplace.

- **Gender equality**

The concept that all human beings are free to develop their personal abilities and make choices without the limitations set by strict gender roles; that the different behaviour, aspirations and needs of women and men are considered, valued and favoured equally.

- **Gender Mainstreaming**

The systematic integration of the respective situations, priorities and needs of women and men in all mainstream policies with a view to promoting equality between women and men. Gender mainstreaming is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes,

in all areas and at all levels. The concept of gender mainstreaming first appeared during the 1985 Third World Conference on Women in Nairobi. The idea has been developed in the UN development community. It was formally featured in 1995 at the Fourth World Conference on Women in Beijing. In January 1997, the Economic and Social Council formally defined the concept: mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels. It is a strategy for making women's as well as men's concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated.

- **Goal setting**

Goal setting is an important step in deciding what achievements should be reached through the learning in the future. Goals exist on different levels. Goal setting should help to distinguish important from less important goals and seek intermediary and realistic steps to achieving a goal. Learners should find long-term visions and short-term motivations. Achieving a goal raises self-confidence.

- **Informal learning**

The EU Memorandum on lifelong learning from 2000 defines informal learning in this way: Informal learning is a natural accompaniment to everyday life. Unlike formal and nonformal learning, informal learning is not necessarily intentional learning and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills. See also non-formal learning.

- **Learning biography**

Adults in particular have had various learning experiences (e.g. in school, in vocational training, in everyday life) in their lives. They have often a complex learning biography. Bad and good experiences are influential on future learning. SDL approaches are aware of this fact and try to find out more about the individual learning biography in order to pay respect to the different learning biographies and find ways of learning (e.g. paths, strategies, methods, interaction forms and goals) which are suitable to the individual learning biography.

- **Learning contract**

Learning contracts are used especially at the beginning of a learning process. The intended content, paths, goals, responsibilities of learners and teachers/tutors can be the subject of a learning contract. Within the process of needs analysis, the contract represents an intermediary result, that testifies to the usefulness, knowledge and importance of the learning for the individual. There exists a big variety of learning contracts in the educational field.

- **Learning to learn**

Learning to learn means that learners become aware of different paths, resources, methods and styles of learning. Learners should acquire meta-strategies for learning which can be applied to different learning subjects. Learning to learn is one form of metacognitive development.

- **Learning styles**

Learning styles are different ways in which people learn. Most people favour, intentionally or unintentionally, some particular method of interacting with, taking in and processing stimuli or information. Scientists have proposed several taxonomies of learning styles. SDL tries to make people aware of their learning styles in order to use them (more) effectively.

- **Metacognitive development**

Metacognition refers to higher order thinking which involves active control over the cognitive processes engaged in learning. Activities such as planning how to approach a given learning task, monitoring comprehension and evaluating progress toward the completion of a task are metacognitive in nature. Because metacognition plays a important role in successful learning, it is important to study metacognitive activity and development to determine how learners can be taught to better apply their cognitive resources through metacognitive control. The stimulation of metacognition is one of the central goals of SDL.

- **Method**

Before every tool can be found information for trainers/tutors on how to apply the tool. The structure of these sheets is identical: Name of the method/tool, target groups, duration, when to use it, goals, short description, variables to take into account, potential of the method/tool for SDL, material required and further information and source.

- **Need**

Discrepancy between what is desired and what exists. The concept of needs is often used to refer to things that people "must" have. They are often contrasted with wants, which are more discretionary. The most widely known academic model of needs was proposed by Abraham Maslow. In it, he proposed that people have a hierarchy of needs, which range from security to self actualisation. However, while this model is intuitively appealing, it has been difficult to operationalise it experimentally. It was further developed by Clayton Alderfer.

- **Need assessment**

The process of identifying learner needs to ensure that a SDL activity is relevant to the individual or a target group (e.g. portfolios can be used for need assessment).

- **Non-formal learning**

The EU Memorandum on lifelong learning of 2000 defines non-formal learning in this way: Non-formal learning takes place alongside the mainstream systems of education and training and does not typically lead to formalised certificates. Non-formal learning may be provided in the workplace and through the activities of civil society organisations and groups (such as in youth organisations, trades unions and political parties). It can also be provided through organisations or services that have been set up to complement formal systems (such as arts, music and sports classes or private tutoring to prepare for examinations). See also informal learning.

- **Portfolio**

A portfolio documents an individual learning process and/or prior learning experience. It is used for individual reflection (see also metacognitive development). It can be used for discussions between learners and teachers/tutors about learning. It should give (new) insights to learning in relation to the individual biography. Learners should become aware of past learning experiences. Portfolios can also be used in group work, where the learners help each other by discussing their learning processes and exchanging their experiences.

- **Self-reflection**

Self-reflection is of crucial importance for SDL. The promotion of self-reflexivity is a central goal of this approach and many of its tools and methods. Increased self-reflection, self-awareness and self-perception helps learners to identify their interests, characteristics and resources for learning. It is assumed that self-reflexive learning is more efficient and more sustainable than other forms of learning.

- **Skills**

Capacity to do something well; technique, ability. Skills are usually acquired or learned, as opposed to abilities, which are often thought of as innate. Theorists have proposed several taxonomies of skills. Some people distinguish between social skills (skills needed in interaction with other people), personal skills (skills needed for self-regulation) and subject-related skills (skills related to a special subject, for example, mathematics or music).

- **Target group**

The primary group of people that something is aimed at. A target group can be people of a certain age, gender, minority, income, e.g. a group of socially disadvantaged people, learners for which a particular method is preferable etc.. A description of the relevant target groups of the project Learn.Empowerment can be found in the guidelines.



Education and Culture

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