

LESSONS TO BE LEARNED AND POLICY RECOMMENDATIONS

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1 INTRODUCTION

In this chapter we will reflect on the IWL project and try to evaluate the experiences gained. Dealing with our pilot cases in schools and companies, organising project teams and co-ordinating their individual and joint activities, as well as the relations with the international advisors and the European Training Foundation (ETF) has created a unique learning situation. The idea of integration of work and learning was relatively new for most of participants and therefore had to be explained extensively in the early stages of the project. It was a special challenge to bring the idea down to operational terms and to define it in the form of concrete issues that the research teams would be dealing with together with the teams from the schools and companies. The co-operation with schools and companies also was unique. First the idea was to be sold to them and later we went together through several stages of the innovation process, which were not experienced previously in the same way. Learning was involved also in the co-operation of the two research teams having different professional backgrounds and coming from different cultural surroundings. The external advisors added their share to this picture. However, common endeavours lead us to some interesting and for the involved organisations useful results. In this respect one could say that we all experienced integration of work and learning.

The immediate results of the IWL project are presented in the previous chapter. The purpose of the present chapter is to draw some "meta" lessons from the individual cases and to generalise on the basis of our experiences. In our development work with schools and companies we hit

several hindrances of which some were removed successfully and some were not. Some were located within the participating organisations, some on the level of public administration, and some in the research teams themselves. Researchers who would do something similar in the future do not need to repeat the mistakes that we made. On the other hand successful approaches could be amplified and adopted and adapted in other situations. The purpose of this reflection is also to turn the attention of public administration, schools and companies to those points at which the integration of work and learning could be enhanced.

There were quite a number of similar experiences gained in both schools and companies. We will start with the presentation of those. However, at the end of this section we will point also to the idiosyncrasies. Special attention will be paid to the macro level, where the influence of public administration and national frameworks in the fields of education, training and labour will be examined.

The project was carried out by two teams of researchers and by the teams of experts from each participation organisation. The observations that follow represent the researchers' views that may not be always shared by the experts from the participating organisations.

2 THE MICRO LEVEL: SCHOOLS AND COMPANIES

Finding and selecting partners

The first question to be solved in our development project was how to find the appropriate organisations and how to choose them. In this respect several details turned out to be important for the attraction of the organisations and for the successful management of the project, which we can fully reflect on only when the project comes to its end.

First, personal links with people from organisations helped in attracting them. However, they are not decisive. In Slovenia only one of the four organisations was attracted this way. Personal links turned to be important in this organisation in a critical phase of the project when the question of its continuation arose. What seems to have had a bigger impact than personal links was the general reputation of the research institute and of the members of the research team. Apart from this, important factors for the attraction of the organisations seem to have been international nature of the project, its innovative content and the way how it was presented, as well as the possibility given to the organisations to promote themselves through their involvement.

We assumed that the chances for the success of the project would be better in innovation-oriented organisations. Therefore we were looking for the companies where endeavours for a better integration of work and learning were already in place, or at least where there was tradition of education and training. For the same reasons we were also looking for schools with an innovative education and training approach and a special focus on forms of work-oriented training. An existing orientation of the organisations towards the integration of work and learning would represent a favourable environment for yet another innovation of this sort. The innovative idea would be better understood and its implementation would be less radical and evoke less resistance. The innovation brought by us would only speed up a change in an already traced

direction. The basic organisational strategy would not need to be changed. In short, a certain organisational maturity in terms of awareness of the issue of integration of work and learning is needed before the next development steps can be made.

The final choice of organisations was only partially made on the basis of their respective IWL orientation and experience. We had to take into account also the preparedness of the organisations to share with us the risks of the project. At the beginning it seemed that we had made quite a good choice. The difficulties started only when real changes were to be introduced, i.e., when certain efforts were to be made in terms of a change of daily practice and patterns of behaviour. It was not only the inertia that was breaking the change process. One should take into account that many people from the organisations had been actively involved in the creation of the existing structures and that the proposed innovations could be understood as a denial of their previous achievements.

The basic orientation of any organisation is not only to market its products but also to market its image. During the initial phase of the project, when we were making a survey of the existing practices, the organisations that we contacted perceived this as a chance to show their achievements and endeavours, which certainly were in all our partner organisations above the average. However, when the existing practice started to be critically examined and changes proposed, the enthusiasm often fell.

Certain differences could be observed between the organisations. One of the most important seems to be a combination of organisation's size and degree of centralisation. In a highly centralised and big organisation the decision making was slow. Every step was to be approved from the top, for which a lot of time was needed. This stands also for the development phase, i.e. before a certain change was introduced organisation wide. In a small and centralised organisation the development was easier because of the direct involvement of the top manager in the project activities.

A better environment for the innovation was undoubtedly provided by a decentralised organisation. After a project team was appointed it could work autonomously during the development phase of the project. The implementation of the novelty was more delicate, however. In the case where one of the leading persons participated in the project team it was immediate in the area for which he was authorised. The implementation in other departments was a matter of selling the ideas to them and subsequent involvement of the top management. In the case where the members of the project team were experts with no particular line management authorisation the development phase was conducted relatively smoothly. A more difficult question was how to break into the implementation stage, i.e. how to present the solutions to the authorised managers convincingly.

Decentralisation may have some undesirable effects as well. The authorisation of lower levels to act on their own may lead to the increasing departmentalisation with declining communication flows. Different departments start to speak different languages and have increasing difficulties to understand each other. The integration of work and learning assumes intensive communication between different departments, especially between the production units and those involved in

human resource management and development (HRM and HRD). It could be noticed that in the participating companies the communication between line managers and technologists on the one hand and education and training, as well as human resource specialists on the other, was not always easy and smooth. It seemed some times that there was a lack of team-work experiences and that both sides relied too much on the functional division of labour and the internal training-market mechanism.

Developing relationships

However, size and centralisation of the organisation are not the only factors that matter. It is very important how complex is the proposed change. Organisations tend to localise their insecurities. Management feels quite comfortable as long as it can keep the change in one department and until the change supports the existing structures and strategies. This is considered a desirable evolution approach. Management becomes much more cautious when the innovation start to challenge organisation-wide management systems and practices. Since integration of work and learning brings a new philosophy into the overall organisation its operational solutions may be pervasive for the whole organisation. A change in management's attitude during the course of the project is exactly what occurred in our project.

Let us give an example. The participating companies practice training widely. They organise various kinds of in-company training and they send many employees to short and longer courses in the country and also abroad. They also practice organisation's learning in terms of frequent adjustments of their internal structures to the increasing turbulence coming from the environment. And they consider themselves to be learning organisations. However, when a further step towards learning organisation was to be made in terms of making training a daily responsibility and practice of line managers and employees, managers became rather cautious. The reason was that in-company training-markets were to be complemented with competence monitoring and development at the work place, as well as with additional methods of training needs analysis and certification of qualifications. The implementation of this step would demand some new instruments, additional time and responsibilities of line managers and also a change in certain procedures of the training and HRM departments. Management needed a lot of consideration concerning necessary time and energies, outcomes and risks before it gave the green light. Yet, organisation-wide implementation of the proposed solutions remains unclear up to today.

One of the crucial considerations of management is the effectiveness of change. Would the time and energies of line managers spent on competence monitoring and development of their employees including keeping the evidence and occasional conversations be outbalanced by higher productivity of their work units in the near future? Would the resistance and necessary persistence at the initial phase of innovation be outbalanced later on by higher competencies and motivation of employees and their superiors? In this respect it is difficult to overlook the remark of one of top managers, namely that they need solutions that are as simple and logical as their products.

One of the important conditions for a smooth project development appeared to be clear and formalised relations established between the research team and the participating organisations. We have tried to achieve this by signing an agreement describing the issues to be dealt with and laying down the tasks and responsibilities of the research team and the team from the participating organisation. In most of the cases it was not necessary to refer to this agreement. However, at points when an organisation started to doubt about its further involvement these agreements have perhaps been decisive for the continuation of the project.

At the initial stage of the project the organisations were motivated for co-operation because of the immediate problems they were faced with or those anticipated in the near future. The research teams also expected it would enter into a more or less developed situation, learn on the basis of the organisations' experiences and help develop them some further steps. This turned out to be true only in the cases in which the organisations themselves were already deeply involved in the integration of work and learning and in which no major additional change was planned for. Most of the cases of the integration of work and learning project in the participating organisations were not much developed however and we even had to invest a lot in the search for a common understanding of the concept. In most of the cases any change in the direction of IWL appeared to be a demanding and time consuming task in terms of reaching a shared understanding.

Understanding refers to the relative novelty of the concepts integration of work and learning and learning organisation in Hungary and Slovenia. Neither side was aware of all their dimensions, which occurred in full variety only in the course of our common activities. In this respect, as mentioned earlier, a true learning situation was created. We knew the direction but we did not know concrete outcomes. The ideas and solutions were developing from one meeting to another. The research group members were coming with new ideas and instruments while the organisation team members were giving their own and were testing the feasibility of the solutions. A good example of such a development was the idea to develop a new approach for training needs analysis and internal certification of qualifications in the Gorenje company. We ended up with a completely new competence development system in which the initial ideas are integrated.

Complexity includes the internal structure of the identified issues and instruments needed to cope with them, such as those for training needs and evaluation analysis, identification, monitoring and development of competencies and similar issues. The implementation of the proposed solutions including the newly developed instruments demanded adjustments or even more profound restructuring of the human resource management and development systems, such as especially performance appraisal, remuneration, daily supervision practice. This brings us back to the time dimension. It turned out that in such a situation it was nearly impossible to find and apply appropriate solutions in the short run. We have had to focus on mid-term solutions for which unfortunately the time ran out too quickly. Nevertheless, the development phase has been finished and the initiative for the implementation has been given.

Although our project ran in the context of the IWL framework it was necessary, especially in more complex situations, to separate the development phase from the application, and particularly from a full-scale one. The risks associated with our intervention were to be minimised

first by means of detailed examination and experimentation with the proposed solutions, and subsequently localised by means of application in one segment of the organisation only. It would not be wise to go straight into a full-scale application, as long as it is not secured that this will adequately replace the old practice. This is why in some cases the decision on a full-scale application has not been made yet.

3 IWL IN SCHOOLS

In Slovenia a centralised educational system allows schools for very little autonomy in terms of curricula development and adjustments to local needs and in terms of financing its operations and salaries for teachers. Innovative ideas born in the schools need a lot of lobbying and time before they reach the national decision-making level of the Ministry of Education. Even if they finally do attract the attention of the national school administration there is no guarantee that they would be accepted and supported financially. And if they finally are supported some kind of universal model is sought for, applicable to all schools in the country, which does not necessarily respond adequately to the local needs that had been at the root of the initial innovation.

An example of a troublesome process of change is the history of the training firm. The concept has been transferred from abroad to several Slovenian schools by enthusiastic headmasters and teachers from individual schools. However, these schools were running the programme for some years at their own expense before they succeeded to make it part of the national curriculum. The solution that has been accepted finally is not satisfactory since the staffing approved by the Ministry of Education is too poor to reach the expected quality of the programme.

Apart from the national programmes of education and training Slovene schools are allowed to offer education and training services for young and adult part-time students on the market. In this area they enjoy a high degree of autonomy. They may offer nationally accredited and other programmes, they charge for services and engage additional staff if needed, they pay teachers honoraria for their services etc. It is not by chance that in the two participating schools in Slovenia we experimented the innovations in this area and not within the so-called national programmes.

The amphibian nature of Slovenian schools is perhaps not unproblematic. When they go on the market they earn additional money and attract additional students by which they decrease the demands for public resources. This is in the interest of public administration. However, they use public facilities for their semi-private business and compete with fully market oriented education and training institutions on an unfair basis. The main lesson to be drawn out of this example speaks for much higher autonomy of public schools. In this case one may expect increasing number of innovations and better adjustments to the local needs, which both provide for the integration of work and learning. On this basis local resources could be attracted also.

Working with the two participating schools we noticed that there were many teachers in search for innovation in education and training. For example teachers from our two schools organise field work for their students, they develop computer-aided classes, they experiment with teaching in teams and with the project approach. However, the school management is not authorised and

has no resources to offer them the support they would need and deserve. Decentralisation of responsibilities would help enhance experiments because they could be developed locally as part of the regular school practice and could also be supported financially. Even more, the Ministry of Education should allocate special resources in terms of money and advisors for school-based innovations.

A higher degree of autonomy of schools however would also demand the development of new functions. Our pilot cases show that the entire education and training cycle could be controlled for by the schools. If the state needs feed-back information on the quality of outcomes in terms of external examinations, the schools would have to establish their internal quality assurance and quality control systems. The School Centre Velenje, which was one of our partners, could serve as a good example of the development of a computer-supported monitoring of the training process and outcomes. The outcomes are not measured only in terms of knowledge and skills improvements but also in terms of learner's satisfaction and job performance effects. In addition, both schools that participated in our project use training needs analysis of clients, i.e. employers and future trainees.

One of the most debated issues of Slovenian schools are the highly subject-structured curricula and, linked to this, the high degree of specialisation of teachers. This together makes teaching and training in schools rather fragmented and leads it away from dealing with real life and work issues. Teachers focus on their narrow subjects structured in a traditional academic manner without enough reference to real work situations. They have difficulties in bringing work examples into the education process, even when organising project work and during teaching in teams. Students therefore reach lower levels of understanding of real work-related issues and their training is therefore by definition incomplete. What should be achieved is better co-operation with employers, e.g. through outplacement and work practice of students in real work situations, involvement of production experts as trainers in the school, occasional participation of teachers in the production process, bringing more real work issues into the teaching and training process. A more problem-oriented and integrated curriculum is needed.

4 IWL IN COMPANIES

The main concern of companies is how to achieve a responsive competence development of their employees in order to be able to cope with the introduction of new technologies and other challenges resulting from the global competition. Up to a certain point companies responded with training of increasing numbers of their employees either inside companies or outside. However, there are limits to this practice set by the demand for smooth production, which can not be maintained if too many workers are permanently on training and out of production. Workers in training would have to be replaced by additional work force. Training has therefore become rather expensive and the results are not always clear in terms of performance effects.

Organisations are therefore paying increasing attention to competence management. This means several things:

- Instead of classical methods of job analysis they try to determine key competencies for effective job performance.
- They monitor the actual competencies and assess prior knowledge of every employee.
- They undertake training needs analysis by making comparisons between the demanded and actual competencies of employees. In addition, they take into account competencies that will be needed in the future career of an employee.
- They tend to make immediate superiors and employees themselves responsible for the development of their competencies. Training in terms of competence development is becoming part and parcel of daily work performance and supervision practice.
- What can not be achieved in the form of learning-by-doing is proposed by employees and their superiors to be complemented by means of special courses. The courses are increasingly adjusted to the individual needs of employees.
- Employees' competencies are recognised in the form of certificates that take into account not only the formal training but also the learning achieved in the process of work. It is important what employees can demonstrate at their work places. For this they must get adequate recognition and remuneration. Competence related remuneration systems have been used in order to achieve this.

Such an approach helps employees to follow the technological change and to contribute to this change themselves in terms of numerous small improvements at their work places. It also reduces the cost of training since it is integrated in a daily work practice and in case of out-of-work training prior knowledge is taken into account. It makes training and learning more focused, excludes unnecessary repetitions, which make participants feel bored and provides for a fluent feedback on the effectiveness of training.

This approach is more active and cost concerned in comparison to the traditional in-company training market. It includes several measures such as competence analysis, monitoring, development and certification, training-needs analysis, changing supervision practices and all together fundamentally changes the responsibilities of supervisors and employees. We have tried to make some steps in this direction also in the pilot cases with our participating companies but major changes are yet to be introduced.

One of the issues that occurred in our project was whether certification of competencies should remain firm-specific or be linked with the national certification system in order to increase the mobility chances of employees. The enterprises would like to use certification as a record of the value of their human capital, which can help them in their HRM decisions. They would also like to motivate employees for making their own efforts in competence development. However, they are more hesitant when it comes to the question of compensation on the basis of competence levels and when the in-company certificates would be publicly recognised as this then may enhance the mobility of employees to other employers. The investments in competence development made would be lost and those who previously contributed to the company's competitiveness would later help its competitors.

5 IWL AND NATIONAL EDUCATION AND EMPLOYMENT POLICIES

It appears that on the national level centralisation and over-regulation of the education and training system are the main obstacles for a better integration of work and learning in Slovenia. Both characteristics make decision-making slow, and lead to the adjustment of education and training to local needs being inadequate because universal solutions are sought for and the initiatives of local agents interested in education and training are blocked. More decentralisation, open curricula and different forms of financing would remove some of these obstacles. By opening of the curricula we mean that on the regional/local level the schools shape curricula according to these needs while the national level keeps responsibility for common national standards. In addition, the ways and methods of organising the learning process and achieving national standards would also be left to the schools.

However, if decentralisation and deregulation are to bring improvements several related changes are needed. There is a need for local/regional development coalitions in which representatives of schools, employers, trade unions, employment offices and human resource development centres would actively participate. They would represent a kind of extended social partnership. Their function would be to establish better links between work and learning in terms of quick adjustments of education and training programmes to the changing needs; they would also enable mobility of teachers and students between schools and companies. Without well-functioning development coalitions on the regional/local level it may happen that the opening-up of the curricula would only decrease the quality of education and training as some warnings from Hungary indicate.

Another precondition for the responsible utilisation of an increased autonomy by the schools is intensive teacher in-service training. Most teachers have been socialised in a kind of 'school industry' system according to which they carry out predefined programmes with the contents structured in detail, and for which they do not need to show much of initiative and creativity. Decentralisation demands a change in teaching methods and styles. In many cases teachers presently miss expertise in more problem, goal and process-oriented teaching and this experience should probably be even brought from outside the country.

Decentralisation would also bring new responsibilities for the school management. It would have to deal with curriculum development, and the organisation of the teaching process would become more demanding. In addition, there would be more financial and personnel issues on the table. In fact the schools would have to set up new functions, of which the development and innovation one is perhaps the most important. Since most of the schools are rather small this would demand co-operation between schools. For instance several schools could have a common development units. If schools are expected to offer high quality education and training demanded dynamically changing markets and technologies, they would need well-equipped workshops that could only be afforded by several schools and companies together in the form of inter-company or regional training centres.

Higher autonomy goes hand in hand with higher accountability. As it is obvious from our pilot cases, schools are themselves interested in establishing feedback flows in the fields where they

operate autonomously. Otherwise they could easily lose clients. The information on the schools' achievements will also be expected by the state. Decentralisation should not mean that the state monitors the meeting of occupational standards only indirectly via labour and training markets. Certain external evaluation procedures and reporting on internal evaluation should be kept. The higher the professional standards of school management and teachers the looser the control of the state authorities can become though.

A further obstacle for IWL in Slovenia are the existing inflexible employment arrangements. They prevent the mobility of experienced company staff to work in schools and teachers to work in companies. Inflexibility is partially caused by disinterested managers of companies and schools, who do not see the advantages of IWL yet. Partially it is caused by the disparities in salaries and the prevailing rigid employment contracts according to which only full-time employment for an indefinite period is fully backed up with social security provisions.

As already mentioned, reflection on the in-company certification system has raised some issues that go beyond the company level, especially in case of linking the in-company certification with the national one. In this case the in-company qualifications become publicly recognised and the mobility of labour may increase. This could contribute to the better functioning of the labour market. However, it may cause certain worries to the companies, especially those that invest a lot in their labour force. Their human resource investments could be capitalised by those that rely on high-mobility personnel policies.

The recent establishment of a national certification system will raise the issue of wage/salary drifts. It will enable recognition of knowledge and skills acquired outside the formal education system and will encourage workers in further improvements of their skills. This will certainly raise demands inside the companies and also demands of trade unions on the national level for the adjustment of wages/salaries to the changed situation. This is highly likely in countries like Slovenia where formal education plays such a decisive role in wage/salary systems. Perhaps one should accentuate more the increased employability of workers either inside or outside the company that is achieved by investments of employers in workers' competence development in order to counter the demands for higher payments.

6 NATIONAL CERTIFICATES AND THE NEW PROSPECTS FOR IWL IN SLOVENIA

The national certification system as it is presently being implemented in Slovenia is based on national occupational standards that are being elaborated for the existing and for new occupations. Within the new system, companies can demand the elaboration of occupational standards for occupations that are not firm-specific. Each standard leads to a recognised occupational qualification. Individuals are able to have their qualifications recognised either on the basis of prior learning assessment or on the basis of a formal training given in a training module, which also is based on the occupational standards.

For our discussion it is of particular importance that certification of national qualifications and modularisation of education and training will enable a better integration of work and learning.

First, each module should be directly related to a certain occupational standard. This way it helps avoid the traditional subject-based structure of the curricula. Second, knowledge and skills acquired in the process of work, on the basis of short term courses, seminars, conferences, meetings or on the basis of self-education has to be taken into account in the process of national qualification recognition. Third, a combination of national qualifications together with certain modules of general knowledge could lead to higher educational levels. Fourth, young pupils and adults attending modularised education and training programmes could get a certain (part) qualification in case that they have left the programme prematurely. Fifth, training modules that would last a shorter period are more attractive for the adults and enhance the mobility of workers from work to training and back. What would be needed in this case is a reasonable job security that should be provided to workers by the employers or on the basis of the agreement between social partners. Sixth, the schools that are losing pupils because of the demographic decline could restructure by focusing on education and training of adults.

7 CONCLUSION

One could pose the question if the integration of work and learning is not a shift back to the traditional craft arrangements, especially because work-based learning is being accentuated. In a certain respect this is the case. However, one should not overlook the differences. School-based and other formal forms of education and training are only complemented by additional ways of knowledge transfer and competence development. Schools therefore do not lose their crucial function. They are unavoidable in offering basic education, which has however to include more of generic knowledge and key competencies. Schools should quicker take into account the changes in the worlds of work and private life. The integration of work and learning in the forms dealt with in our project opens the door for life-long and life-wide learning.