

Equal Opportunities

A Manual of Best Practices

Balance Partnership

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Balance Partnership
University of Debrecen,
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Table of contents

Introduction

The 'Balance' Partnership
and the Good Practice Manual 7

Chapter One

The Application of
'Soft Indicators' in the Balance Partnership 29

Chapter Two

Comparison of National Rules, Legislation,
Practices and Experiences
on Equal Opportunities in the Labour Market 53

Chapter Three

Comparison of Training Methods and Programmes
for Women's Job Opportunities 79

Appendices 89

Appendix 1

Glossary of Commonly Used Terms 91

Appendix 2

Concept and Utility of "Soft Indicators" 95

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Introduction: The 'Balance' Partnership and the Good Practice Manual

The present volume is one of the final results of the cooperation between four EQUAL Development Partnerships: the Inspirál (Hungary), Camp de Turia Concilia (Spain), POISE (Promoting Opportunities for Inclusion in Social Care Employment, Northern Ireland), and Universo Donna (Italy). These partners formed the 'Balance' Transnational Partnership in 2005 April with the purpose of identifying best practices on fields related to equal opportunities, conducting common research activities on them, and exploiting of these results in their national projects again.

In the first part of this introduction, we will briefly describe the national activities of each Development Partnership of the Balance Partnership and the second part will be dedicated to the common research activities conducted in the framework of this cooperation.

The Development Partnerships

INSPIRÁL (INSPIRATION) PROJECT, Hungary

The "Inspirál" project was started in 2005, in the framework of the cooperation of three partners, namely the Matúra and Natúra Foundation, the University of Debrecen, and the Federation of the Local Governments of Bihar.

The **Matúra es Natúra Alapítvány (Matura and Natura Foundation)** already had considerable experience in educating people outside of the boundaries of the traditional educational system. Its main activities focus on: vocational training, organising training on labour market and on personality development. Its personnel have conducted numerous successful projects financed by various Employment Offices, and the National Educational Fund. The Foundation took part successfully in the first action of the EQUAL programme as a member of the consortium lead by the local government of Debrecen. The project, entitled "DMJV Onkormanyzat- Knowing how to work, HU-4)" offered a training program for Roma men and women to fight job segregation and to promote their integration into the labour market. In 2005 The Foundation started this new EQUAL project (Inspirál, H011), this time as the leader of the DP. The Foundation was responsible, besides the overall success of the project, for the management, the administration, the trainings,



the monitoring, the placing-at work, and took part in the transnational activities. The **Debreceni Egyetem (University of Debrecen)**, being one of the most prestigious and largest higher educational institute of Hungary, is the natural centre of all research activities in the Northern Great Plain Region. Besides its widespread training activities, the Department of Sociology and Social Policy has a special interest in the fields of the world of labour and youth and job reintegration and it focuses its research activities on these issues. In the past few years the Department has started or has successfully accomplished numerous projects on the fields of promoting integration into the labour market, for instance in the framework of project supported by Human Resource Operative Programme (HEFOP), Regional Operative Programme (ROP), National Employment Foundation (OFA), or the Leonardo da Vinci Programme. In the Inspirál project, its main task was to coordinate the transnational activities, to monitor the project, and to help the keeping-at-work activities.

The **Bihari Önkormányzatok Szövetsége (Federation of the Local Governments of Bihar)** was called into being in 1995 by 34 local authorities in the Bihar region, one of the most disadvantageous territories of Hungary. The Federation focuses on the management and coordination of the tasks related to the development of the region. In these activities, the Federation accomplished a project supported by the National Employment Foundation (OFA), in which is started successfully a labour-agency. In this cooperation, the Federation's tasks covered needs

assessment, recruiting, and building up cooperation with the network of employers. The **aim** of the experimental model programme, in which all partners agreed, was to develop a training, employment and follow-up programme, which can effectively help the unemployed women coming from disadvantageous background to solve their own employment problems and to promote this group's labour market integration. The programme struggled for helping the participants from a "go-slow", "fence-sitting" and passive behaviour into an active, creative and problem-solving habit. The **method** was supported by a set of other services in the framework of an experimental project. These supporting services consisted of:

- needs assessment about the employers in the region,
- developing new adult-training courses (modular DACUM system),
- offering a practice-oriented, competence-based vocational training,
- placing-at-work with the help of a labour market advisor,
- keeping-at-work,
- follow-up service, and
- continuous psycho-social support during all phases of the project.



The project's **beneficiaries** are the unemployed (mainly) women, who are without profession, or who have out-of-date/non-marketable profession, or who are Roma, or who have altered working ability, or who are more than 45 years old, or who are dropped out of school, or who have just returned from maternity benefit.

Main Activities

To achieve the project's goals, in 2006/2007 vocational trainings were organised for 43 beneficiaries in three groups: upholsterer, public servant administrative, and housekeeper.

Training	Women	Men
Public service administrative	14	2
Housekeeper	15	0
Upholsterer	10	2
TOTAL	39	4

At the end of the training out of the 42 beneficiaries, 41 took successful exams and received a certificate registered in the OKJ (National Register of Trainings). One of the ben-



eficiaries could find a job during the training and another became pregnant. On 1 May, 2007, all beneficiaries were placed at work according to their recently acquired vocation and with the financial support of the project for the employers. At present, all of them are employed, only one of them has left the project, because she found another job. Due to the delays in starting the project, the activities will last till June, 2008.

Additional outputs of the project were defined as

- Training, methods of career-orientational and competence-assessing methods,
- Competence-based training material, methods of modular vocational training,
- Experience and material on psychosocial trainings, reintegrational, and resocializational services.

CAMP DE TURIA PROJECT, Spain



From Valencia we would like to inform you which are the actions and services that our project offers and also I would like that we begin to think more deeply about the Work Life Balance we are working on. Our project is called Camp de Turia CONCILIA and is concerned with work life balance.

The **members** of the DP are:

- COIICV, it is the entity that coordinates all the transnational activities, is in charge of IT management and internal evaluation of the project.
- FVMP is responsible for the transfer of good practices and results to general policies at regional and national level.
- Optimiza Limited is the entity which will ensure the gender perspective and equal opportunities are applied.
- MasMedios Limited. It is a private company that develops and implements all the software and IT in the project, also it is in charge of all media and communication issues.
- And finally the MCT is the public body that manages the whole project and in whose territory the actions are implemented.

First, we would like to outline the **present situation** in Camp de Turia territory. Following a preliminary study we detected a necessity to apply for a project to facilitate the work-life balance. In the 15 municipalities of Camp de Turia territory there live approximately

a 120,000 inhabitants. It is a society with strongly defined traditional roles: women are responsible for domestic tasks and reproduction, while men dedicate themselves to production tasks.

In general, this society is not aware of equal opportunities themes, and evidence of this is the fact that almost 60% of the total unemployed are women. In respect to work-life balance measures, there are few kinder gardens, day centres, residential homes, crèches, care services for the elderly and children. There are some programs of home help for elderly people but as they are grant supported these tend to be of a temporary nature

The engrained stereotypes limit women to the role of carer for family dependents, be they children or elderly while the husband has to leave the house to earn money to maintain all the family. Very few support services or policies for equal opportunities between women and men exist. Add to this, that services to help women careers do not exist either, their ability to re-enter the labour market in equal opportunities is doubly difficult.

The **general objective** of the project is to promote equal opportunities for women and men in Camp de Turia. Our target is preferably those women that have suffered or suffer discrimination because of the lack of work life balance and women with dependents. Overall, Camp Turia CONCILIA, is targeted at the general population as we would like to change the mentality within the society.



Since January 2005, when we started the project, until now we have given support to 173 people, of which, 144 were women, and 19 were men.



Other actions more specific are:

- The development of intranet for the internal management of the DP.
- Development, as well, of the extranet that is updated constantly with news and the future actions of the project.
- For the general awareness and dissemination to the population, we have published several materials that facilitate easier understanding. Among them, the edition of brochures, posters, stands, stickers, solidarity bands, pens and bulletins of news about the project (we have done five so far)...At another level, we have given speeches and presentations.

We are still working on the diagnostic study of the territory and the resources guide, in matters of work life balance.

- For the study we have done a sample of enquires to two hundred people that belong to MCT and we have interviewed the Development and Employment Agents of the fifteen municipalities of MCT. Shortly, we will interview the mayors of the city councils and representatives of the business sector. All of this, is aimed at detecting the deficiencies in CT and to adjust the actions of the project to the needs.
- With regard to the resources guide, we are continuing to gather information about services and organisations that work to improve work life balance.
- All of these, we are placing on a digital platform for easier access to everybody.

The Equal Opportunities Agency is the nerve centre of all activities. From the Call Center we are giving support to those who contact us by telephone and internet.

Other actions that we have done include the training for the technicians. Through an e-learning platform we are teaching the course of "Equal Opportunities Agents" addressed to staff of the DP and the Development and Employment Agents of MCT. This course lasts 150 hours, it is officially certificated and there are 57 people enrolled.

Amongst the measures we are taking in relation to work life balance, includes another study. This one is about the viability of running a crèche on an industrial estate in Liria. The initiative is private and is financed by some companies of this area. The aim is to help workers to harmonise the care of their children and their job. From CTC we are giving our support to initiatives such as this one.

From the transnationality, CTC is included in two networks with their respective work-groups:

In WOMEN AGREEMENT, with:

- EO legislative comparison.
- Best practices
- And resources guide.

In BALANCE PARTHERSHIP, with:

- The identification of soft indicators.
- EO legislative comparison
- And training methods comparison.

Moreover, in both networks we are developing the Transnational Press Agency. These are the steps that we have taken:

- Gathered the details of Equal Project leaders who focus on reconciling family and professional life and reducing gender gaps desegregation.
- Sent a letter in English, Spanish and French to all these equal projects leaders to:
 - Introduce the CTC project and the transnational Press Agency.
 - Invite them to participate and contribute to the Transnational Press Agency and send us by e-mail national or international news about work life balance.
 - Introduce them to our newsletter and invite them to subscribe.
- Searched and collected sources which can regularly provide news.
- Added to the web site a section to invite and encourage visitors to suggest their news.
- The Equal Opportunities Agents Training.
- Collaboration agreements with companies aware of EO
- The dissemination campaign
- The training for politicians.
- The diagnostic territorial study.

And then, these are the **actions** foreseen:

- Digital literacy programme.
- Transference forums.
- Collaboration agreements with day centers and residential homes.
- Virtual assistance of extralaboral tasks.
- And Conciliation and equality tools:
 - GENDER OBSERVATORY: Monitoring the transversal gender perspective across the project actions and evaluation of the their gender impact.
 - Development of a gender inclusive manual.

- Generate valid models for the adoption of measures with regard to equal opportunities in companies.
- Certification of companies which successfully implement conciliation plans.
- Disseminate and promote equal opportunities initiatives in the sphere of influence of the project
- GUIDE ON EQUALITY AND WORK LIFE BALANCE ISSUES: This Guide gathers together information about equal opportunities and work life balance in a concrete context, and underlines different perspectives of agents implied in their implementation. It also provides guidelines on equal opportunities and work life balance, best practices and positive actions.
- MANUAL ON GENDER INCLUSIVE LANGUAGE; This manual compiles language alternatives which avoid discrimination and facilitates the breakage of gender based stereotype and roles
- CONCILIATION PLANS IN COMPANIES: Their objective are implement work life balance and equal opportunities measures in companies, providing resources and a contrasted methodology to balance the needs of companies and those of their employees.

The **obstacles** that we have encountered from the beginning until now, are:

- Finding expert partners in equal opportunities.
 - Communication difficulties with national management authorities.
- Project management complexities, principally at th financial level.
- Delays in payments from the national management authorities.
 - Delays in the development of activities.
 - Excessive red tape and slowness in public administration management.
 - The lack of involvement of some beneficiaries in the active role of performing EO practices.

As regards the **best practices** detected, we have detected three of them:

- The EO agents training
- The short film focused on work life balance problem.
- The agreement to the FVMP

The product that we think will continue after the project has finished is the Equal Opportunities Agency, giving support to women that want to find a job in equal opportunities that helps them to improve work life balance.



PROMOTING OPPORTUNITIES FOR INCLUSION IN SOCIAL CARE EMPLOYMENT (POISE) PROJECT, Northern Ireland

The POISE Development Partnership comprises of:

- Association for Real Change (ARC)
- Belfast Health & Social Care Trust
- Positive Futures
- South Eastern Health & Social Care Trust

POISE sought to help broadly two groups of people:

- Men who have not previously been employed in the care sector
- Women who may experience obstacles to remaining in care sector employment or progressing in their careers

The aims of the project are to:

- Promote equality in employment in the care sector in Northern Ireland focusing initially on learning disability
- Specifically target the under-representation of males in direct support roles
- Promote the retention and progression of females in learning disability services
- Draw on European experiences and national networks to source ideas/models to introduce to Northern Ireland; and
- Disseminate and mainstream our findings throughout the care sector in Northern Ireland.

Methods used to complete the aims of the project:

- Production of a comprehensive series of research reports that have identified for employers the profile of their learning disability social care workforce, assisted in workforce planning and clarified the need for improved recruitment mechanisms
- vForging links with key agencies, from where potential recruits were identified for recruitment activities including community groups, Further/Higher Education institutions, Job Centres, careers guidance personnel and schools





- Production of a multi-media DVD that raises awareness of learning disability, promotes positive role models and has been used as a resource to recruitment activities in the partner agencies
- Delivery of eight pre-recruitment support programmes (Care To Make A Difference?) for potential employees which included awareness raising of what working in a learning disability service means, outlining potential posts available, exposure to positive role models, assistance with application forms and interview techniques over a 5 day programme.
- Completion of a review of current recruitment and selection practices within partner agencies and agreement of changes required to improve staff recruitment process
- Design and delivery of two Induction to Management Programmes for 21 female staff in the partner agencies to encourage them to progress and stay within learning disability services.
- Work is ongoing on the production of a Good Practice Manual to support the integration of the learning from the project across the workforce
- Participation in a Transnational Partnership between Hungary, Italy and Spain

Achievements / results / outputs of the project

- To date the project has successfully trained 88 people and have recruited / placed 21 persons in learning disability services of the 55 who made an application for jobs (a success rate of 38%). The project evaluator, Professor Roy McConkey, noted in his last report that "This appears to be twice as high a placement rate as those who were short-listed for jobs through the traditional route. Particularly significant are the number of male staff recruited and placed (3 times the present ratio in services)".
- To date, 21 women have completed the First Steps programme. First Steps, has been very positively evaluated by participants each of whom will receive accredited certifi-

icates at Level 4. To date four (21%) of learners have gained promotion to supervisory roles since commencing the programme.

- Each organisation in the DP was represented at all of the four transnational meetings held in Northern Ireland, Spain, Italy and Hungary.
- At least one member of the POISE DP participated in each of the transnational working groups held during each of the transnational meetings.
- The project produced a DVD, 'No Ordinary Job' and launched in November 2006
- Research collated includes:
 - 'More than a Job' – Profile of the Social Care Workforce in Learning Disability Services
 - 'Men Can Care' – newsletter containing outcome of focus groups with males already working the learning disability services
 - Composite Research Report currently being compiled to provide details of all research collated during the project. Due to be launched in January 2008.

Future of the POISE Project

The DP Board are currently considering a business case to fund the POISE Project to continue at a refined level for a further year. This would enable the following outcomes to be achieved:

- The Care to Make a Difference Pre-Recruitment Programme will be held six times i.e. three programmes in each trust area.
- POISE staff will support exploration of the feasibility of shared recruitment across the partner agencies.
- The feasibility of establishing a learning disability specific employment agency will be established.
- POISE staff will support funding applications on behalf of the three partners to enable further transnational projects to be established.

UNIVERSO DONNA PROJECT, Italy



The Universo Donna Development Partnership comprises of:

- Comune di Navelli
- Comune di L'Aquila
- Università degli Studi di L'Aquila
- Soc. Coop. Sociale "Help Donna"
- Abruzzo Incoming s.r.l.

Universo Donna tried to help

- Women to access or remain in the labour market, when they have family problems with elderly and disabled people;
- unemployed women to find new job opportunities in the social field;
- Elderly and disabled people to find a new and better kind of assistance.

The aims of the project are to

- Create new flexible care services should enable women to access or remain in the labour market;
- Create, at the same time, jobs for unemployed women in an economic growing sector;
- Help our territory to face the big aging of the population and the lack of job opportunities for women;
- Draw on European experiences and national networks to source ideas/models to introduce to our Region.

Methods used to complete the aims of the project:

- Implementation of a daily centre for elderly and disabled people, in a rural contest (Collepietro);
- Implementation of a daily centre in a urban contest (L'Aquila) focused on blind people;
- Offering a new kind of Assistance for mental Disabled Families through a *friendly approach*, by the Interdepartmental Centre for Behavioural Troubles of University of L'Aquila;
- Training for a new figure, the Social Promoter, who will help firms to rethink their work in our territory, supplying good quality services more and more efficiently, for elderly people, physical and mental disabled people and their family, in the light of the latest development of the non-profit sector The Social Promoter;
- Organization of a cycle of seminars, in cooperation with experts in sectors like law, criminology, sociology and psychology, and also with police forces, with the aim to enhance the physical safety of both the person and the house from intrusions and violence, and the safety of the psychical personality from circumvention, mobbing, psychological and behavioural subalternity.
- Participation in a Transnational Partnership between Hungary, Northern Ireland and Spain;

Achievements / results / outputs of the project

- The Centre in Collepietro has more than 20 guests, and became an important point of reference for the whole territory, so that other local public bodies decided to finance it for another two years (2008-09);





- The Municipality of L'Aquila, together with the Italian Blind Union, wish to maintain the centre in L'Aquila opened also after Universo Donna project;
- "A tutor as a Friend" had a big success, helping twelve people with disabilities and their families to enhance their quality of life, and University of L'Aquila is trying to set it as apprenticeship for university graduated who want to specialize in behavioural troubles;
- thirteen women have completed the "Social Promoter" course with success, and at the end they prepared a real social project. Some of these projects have already been implemented by different bodies and consequently some of our Social Promoters are already working;
- Universo Donna participated with a lot of interest to all of the four transnational meetings held in Northern Ireland, Spain, Italy and Hungary.
- The project produced a DVD, launched at the end of 2007;

Future of Universo Donna Project

"Universo Donna" will end its works at the end of march 2008, and most of the results are already reached (especially the survival of the two centres).

The DPs are currently organizing the final event to disseminate all the positive results, and also thinking about further actions, such as to support funding applications on behalf of the three partners to enable further transnational projects to be established, and working in a International Online Community of Practices to identify development priorities to advance health care of frail older people, led by Glasgow Caledonian University.

The common activities of the 'Balance' Partnership and the Equal Opportunities Manual

As seen in the first half of this introduction, the four DPs had hardly any common element in their own practical activities. Coming from different background and having different target groups and project goals, it is always difficult to focus research activities and share common research tools. However, while planning the activities of the transnational cooperation, the partners could identify 7 common general goals in their national projects, which could serve as a basis for cooperation:

- Creating new opportunities in the labour market for disadvantaged social group.
- Improving equal opportunities in the labour market for disadvantaged social groups.

- Providing professional training for disadvantaged social groups.
- Reducing gender gaps in employment practices.
- Identifying adaptable forms to be used for reconciling family and working life.
- Enhancing the sustainability of experimental activities.
- Raising awareness of the impact of the EQUAL project in each country.

Based on these common general goals, the 4 partners agreed the 5 following objectives:

- To standardise commonly used professional terms.
- To identify soft indicators to be used for measuring development that is difficult to grasp with conventional statistical methods.
- To identify good practices related to the labour market, equal opportunities and the employment of women and creating career opportunities.
- To compare legal regulations and national practices related to the labour market, equal opportunities and the employment of men and women.
- To investigate the experiences of national practices carried out in different contexts to see if they can be applied in other countries.

To achieve these goals, the members of the partnership shared the tasks among themselves and formed three working groups:

- **Soft Indicators** (lead partner: Hungary): To identify soft indicators to be used for measuring development that is difficult to grasp using conventional methods.





- **Comparison of legislation in relation to equal opportunities** (lead partner: Spain): To compare legal regulations and national practices related to the labour market, equal opportunities and the employment of men and women.
- **Comparison of training methods to improve opportunities for men and women** (lead partner: Italy): To identify good practices related to the labour market, equal opportunities and the employment of women and creating career opportunities.

In WG 1 (lead by the Hungarian partner), the partners used and experienced a new method, the 'soft indicators' in order to measure the results of the development and the travelled distance of the beneficiaries. In WG 2 (lead by the Spanish partner), the partners studied the question of women and child bearing, and their support from national legal, support and institutional systems. In WG 3 (lead by the Italian partner), the international experts focused on the role of adult education. The Irish partners took the responsibility of preparing a glossary of the commonly used terms and evaluating the partnership. The Hungarian DP agreed to act as secretariat for the partnership and to develop a website to support the work (natura.axelero.net). These activities of the three WGs were to be met through a series of transnational visits between 2005 October and 2007 October.

In the present volume, the first three chapters comprise the final reports of these working groups. Three DPs were responsible for coordinating the activities of the WGs, while POISE was responsible for finalizing the document about commonly used terms (see Appendix 1). The partners also attached a brief methodological paper about the concept of soft indicators (see Appendix 2). In spite the fact that the WGs could follow the work process of each other through the reports on the transnational meetings and the working documents presented on them, the three chapters approach their own topic with three different methods. The chosen topics and methods together can well characterize what were the questions which concerned the most the partners, and which were the specific elements, which could mutually enrich the partners' expertise and contribute much to establishing their own dissemination activities and to develop their own national innovations.

Chapter One. *The Application of 'Soft Indicators' in the Balance Partnership*, tries to answer a problem in human resource management, i.e. sometimes the distance travelled by the participants seems to be intangible and immeasurable. Besides hard data (How many participants could find a job? How much do they earn?), those changes are also of interest what are hard to describe with numbers. To what extent is the beneficiary more motivated to work after the programme? Can she communicate better? How did

her working ability improve? Hard indicators can hardly answer these questions about qualitative changes.

In the 'Balance' Partnership, the experts decided to use the tool of soft indicator survey on the following fields: basic literacy and numeric skills, confidence in making progress towards getting a job, communication and co-operative skills (including ICT), and management of time regarding home/work responsibilities. In the framework of the survey, the trainers and the trainees answered questions about the trainees' key competences on the scale of 10 at the beginning and at the end of the trainings; and the participant's personal development was measured with the help of these data.

This experimental model survey was an effective tool to change the approach of the experts regarding this new tool and to convince them about the necessity of using soft indicators.

In **Chapter Two**, *Comparison of National Rules, Legislation, Practices and Experiences on Equal Opportunities in the Labour Market*, the experts focused on the question, how pregnant women and mothers are supported in the four countries to strengthen their labour market and social position. In the introduction, the paper gives a brief overview of the usual support elements in Europe summarizing the services, guarantees, and benefits which the legislation in the European Union secures for the women, and especially child bearing women. After this, in the main part of the study, it describes how and under what conditions welfare support forms are available in each country

As the authors acknowledged, the comparative analysis of national support systems proved challenging. The form and degree of support is always determined by a country's economic situation and the traditions of social care systems. The systems, services, and the meaning of terms proved different in the national context. For instance, in Northern Ireland, the care system focuses on women in management position and men working in the service sector; in Hungary, most of the benefits address families with three or more children; in Spain the tasks related to children are addressed on a wider scale than in the other three countries.

However, the authors determined several fields, where differences could be demonstrated and they focused on these issues, such as maternity benefits, leave and pay, child care aid, child care education benefits, paternity benefits, leave and pay, flexible working hours, compassionate leave (i.e. a reduction in the working day to take care of a seriously ill relative).

This comparison of the services and their legal background provides us with an insight to the service and care systems of the four countries, and can provoke thoughts on the possibilities of securing the welfare of women and children following another way, organized in another system and applying another logic.

Chapter Three, *Comparison of Training Methods and Programmes for Women's Job Opportunities*, compared the adult education training methods applied by the partner DPs. Each DP organized trainings to improve equal opportunities and adapted it to the needs of its own target group.

Similarly to the other three WGs, the comparison was not easy. In Northern Ireland, the training addressed helpers to equip them with methodological tools and skills to help persons with special learning needs to enter labour market and integrate them into the society. In Italy, the participants were also helpers, but working on the field of elderly care. In Spain, the trainees were politicians and decision makers applied by agencies promoting equal opportunities. Unlike the other three cases, in Hungary, the participants were from the "primary" target group, namely unemployed women coming from multiply disadvantaged regions with out-dated or non-marketable professions.

To compare the data, the authors used a clear and well arranged table, which describes the activities of each national project. Besides this table on general data, the authors chose four aspects to compare the trainings. With the first, communication, the study answers the question, why communication was a core element in all of the trainings. The second aspect, e-learning, is related to methodology. With this, the authors compared, on which level was e-learning applicable in the trainings. The third question of the analysis was whether paying the students is an effective tool in such trainings. In the fourth com-





parison, the authors applied narrative methods. With the help of short stories about the beneficiaries, they tried to demonstrate what difference the training had made for women, or, in other words, this subchapter encompasses good examples on how the opinion of the beneficiaries had changed about woman employment in such a short period.

Appendix 1, *Glossary of Commonly Used Terms*, endeavours to ease the communication of the international experts joined in this partnership. This served as a base for working out a common language so that the different meanings of terms caused by the diverse cultural, traditional, or legal backgrounds do not impose obstacles to the cooperation. This glossary, we strongly believe, can serve as a useful tool for a wider public as well. This collection of definitions can be easily and effectively applied as a terminological background material by any expert, or even layman, dealing with gender issues. Besides a set of general terms, it also encompasses terms specific to the topics of each working group.

Appendix 2, *Concept and Utility of Soft Indicators*, is a methodological background material for the application of soft indicators. It analyses in depths the method of this new self- and expert evaluation tool, describes its utility, measurement points, and gives practical advices to its future users.

Finally, we recommend this volume to the kind attention of those readers, who are interested in gender issues, programmes for promoting equal opportunities and labour

market integration. This volume is a collection of good examples, and, together with it, methodological tools, which can be applied by any other projects fighting against job segregation and gender inequalities. We hope that this book also provides the reader with useful information about the activities of 'Balance' Partnership and its Development Partnerships, and that this brief insight leaves them with the impression that this cooperation proved fruitful and successful.

The Application of 'Soft Indicators' in the Balance Partnership

by Balázs Krémer, Zita Éva Nagy, Mariead Magill, Marco De Luca, Chelo Herraes, Flórián Sipos, Mariangela Tucceri, Leanne Simpson, Dawn Sims, Juan Carlos Miembro, and Carmen Gil

INTRODUCTION

In the Transnational Co-operation Agreement (TCA), the partnership agreed to look at how each country measures soft indicators in relation to the personal and professional development of beneficiaries.

Although each project is very different, they all have a common theme of engaging with disadvantaged groups in society and assisting them in gaining employment or training towards employment.

Monitoring systems for other employment programmes, which are targeting unemployed people have traditionally focused on 'hard', quantitative outcomes such as the numbers going into jobs or the numbers gaining qualifications. There is growing recognition, however, that such measures taken in isolation are inadequate in demonstrating the success of a project as a whole. In addition, these 'hard' measures of success do not give a complete picture of beneficiaries increased employability. It is often both unlikely and inappropriate for many projects to expect to achieve 'hard' outcomes from target groups that are socially excluded and facing multiple barriers to employment.

WHAT ARE 'SOFT' OUTCOMES?

The projects involved in this partnership and other employment programmes dealing with people who are disadvantaged in the labour market, soft outcomes are those which, unlike hard outcomes cannot be measured directly or tangibly. They are:

- Intangible, not concrete
- Subjective
- A matter of degree rather than absolute
- Personal, depending on individual client needs
- Intermediate (usually measuring progress towards hard outcomes such as employment and qualifications).

WHAT ARE 'SOFT' INDICATORS?

There is an interplay between indicators and outcomes, in that indicators are the means by which it is possible to measure whether outcomes have been achieved. The term soft indicators is used when referring to the achievements which may 'indicate' acquisition or progress toward an outcome. It is clear that not all indicators, or measures of progression, are necessarily suitable for all client groups; some are target group specific.

THE APPLICATION OF SOFT INDICATORS IN THE 'BALANCE' PARTNERSHIP

During the programme, we endeavoured to collect a common set of indicators that can assess the achievements of beneficiaries on all programmes with significantly different purposes and content, implementing the training with varied target groups. We struggled to find a suitable tool for measuring the development of the programmes which were relatively well-known to all projects and technically easy to use.



We regarded one participant as the "observation unit" of indices and we planned on comparing four areas:

- Basic literacy and numeracy skills,
- Confidence in making progress towards getting a job,
- Communication and co-operative skills (including ICT and foreign languages)
- Management of time regarding home/work responsibilities

It was agreed that the questionnaires would be completed by the beneficiaries and by the tutors providing the training.

For the sake of easy harmonisation, we chose to apply the "school" method, i.e. we took the grading as a basis of applying the indicators, a comparatively well known method from the educational systems. The sense, in which this grading differs from the traditional school grading practice and is closer to the competence-based approach of modern pedagogy. Beneficiaries were asked to evaluate not the acquirement of lexical knowledge but to express in the indices the existence of basic reading, writing, counting, communicating, and cooperative skills along with the acquirement of professional skills. The repeated assessment furnishes an opportunity not only to assess static state-of-art but also to express development with numerical indices.

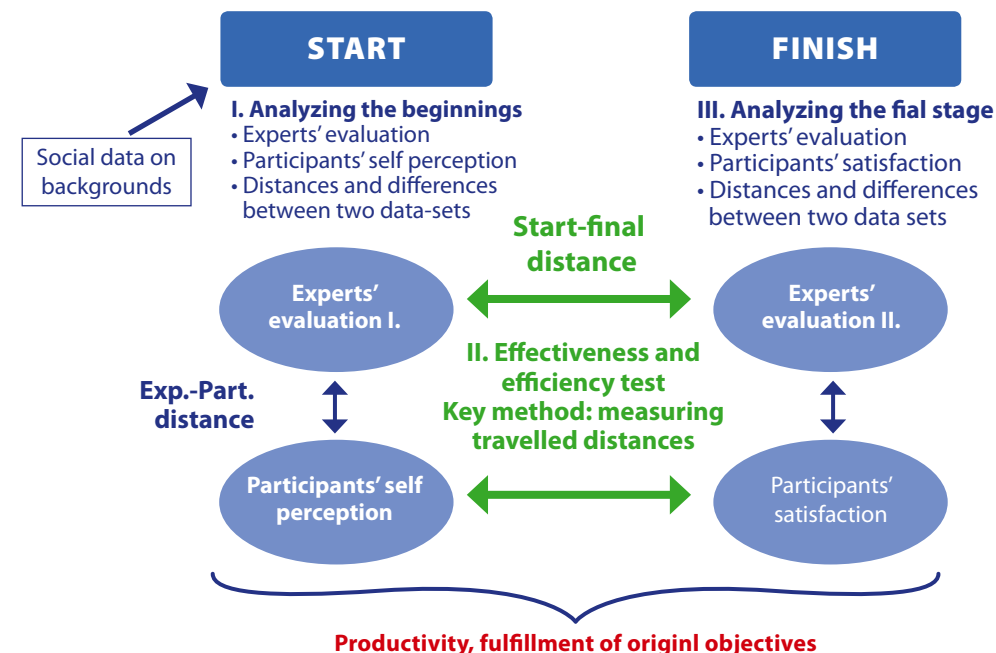


Figure 1. Possible methods of data processing

In spite of all our efforts, the chosen method did not prove to be appropriate in four so different project environments. The projects in Italy, Spain, Northern Ireland, and Hungary were similar in the sense that they tried to mitigate social exclusive effects with the tool of training. However, the difference was so fundamental between the chosen target groups and the directions of development, which the national projects aimed at achieving, that it proved to be impossible to evaluate these diverse orientations with a comparative method based on a common set of indicators worked out together. In the case of our transnational cooperation, this resulted in the fact that the method did not enable the normative and efficiency-based comparison of the national projects.

On the other hand, the failure of the comparison provides us with an informative piece of experience in the field of methodology, and warns all of us about the limits of the applicability of "soft indicators;" there are no miracles in this field. We supposed, maybe not cautiously, that the fight against social exclusion and the application of educational tools could provide us with a solid basis for comparison and for applying common or at least similar indicators. Experience has shown that similar target groups, goals, and principles need to be specified more precisely so that one can measure and compare them.

AND THE PRACTICE...

INSPIRAL Project, Hungary

For illustrating the opportunities of using soft indicators, the Hungarian project chose the evaluation forms of the participants trained to become upholsterers. The training has been organised by the Matura and Natura Foundation. In the participants' group they have all four data-sheets only in case of 12 future upholsters – 10 women and 2 men.



Assessments with soft indicators were applied in the following fields:

1. (Academic) knowledge, marks, exams

Marks and exam result – relative to the disciplines and skills taught during the project.

2. (Academic) skills, literacy, counting, etc.

Judgements, or marks, from teachers and trainers – on reading, writing, and counting.

3. Manual and technical skills

Relevant to the hopeful job-opportunities – made by technical trainers, "craft-teachers", "masters", etc.

4. Communicating skills

"Marks" on

- ▶ Clearly expressed thoughts, clear intonation,
- ▶ Attention for other speakers, ability to concentrate onto teachers,
- ▶ Understanding the (oral and/or written) thoughts of others
- ▶ Mailing, e-mailing, using mobile phone and SMS,
- ▶ "Extra bonuses": foreign language, translation and interpretation
- ▶ Aggressiveness – tolerance
- ▶ Being open and interested toward others,
- ▶ Being capable to coordinate, organize mates or colleagues

5. Health, outlook and clothes

"Marks" on

- ▶ Health condition and special risks (heavy smoking, being extremely fat, visible dental problems, etc.)
- ▶ Properly treated health problems (regular visits to GP or other medical therapists)
- ▶ "Dirty-clean" dresses, clothes,



- ▶ Properly cared body, hair,
- ▶ Existence of unusual or provoking gestures, signals on body or clothes
- ▶ "Decent outlook"

6. Time consciousness and reliability

"Marks" on

- ▶ Good time keeping at appointments, at the beginning of programmes, courses, trainings
- ▶ Keeping deadlines
- ▶ Conscious and logical "step by step" order in decisions and consequences
- ▶ Properly managed time, schedules, "order in time"
- ▶ Reliability in terms of keeping the rules, being committed to the promises, contracts and deals made before

7. Additional behavioural and family circumstances

"Marks" on

- ▶ Stable – uncertain family relations,
- ▶ Isolation – large networks, well integrated into community and/or civic society,
- ▶ Volunteer activities – including music, sport, culture, etc.
- ▶ Drug or alcohol problems, dependency

- Violence at family or neighbourhood,
- Properly cared dependent family members (small kids, disabled or frail persons, etc.)
- Properly treated behavioural problems in family, among kids (regular visit of schools, addictions, mental problems, criminal issues, etc.)

In the course of analysis – which is much narrower than possible because of the restricted character of the present study – three aspects were studied:

- The changes of participants' self-evaluation in the course of the programme.
- The changes in the trainers' judgement about the participants in the course of the programme.
- The differences between self-evaluation of the participants and their evaluation from the viewpoint of the trainers.

CHANGES OF PARTICIPANTS' SELF-EVALUATION IN THE COURSE OF THE PROGRAMME

One of the peculiarities of the complex employment programme (European Social Fund-type), to which the 'Inspirál' project belongs as well – is that they train, but in parallel employ, develop skills and replace a number of elements of socialisation which can end up in a continuous, long-term disadvantage on the job market. A part of the programme results – for example the number of those who completed the training, the real number of employed participants – are relatively easy to measure. In comparison it is all the more difficult to define the results and expedience of the work done related to deficiencies of skills, abilities and socialisation. One of – probably the most important – factors of transformations is what the first target group, that is to say the participants can perceive of them.

In the initial phase of the programme, we experienced the following facts (by different measurement areas):

– Theoretical knowledge and skills, abilities, manual skills and vocational skills

In these fields the self-evaluation of the participants appeared to be beyond the average (the worse grades belong to the evaluation of vocational – theoretical knowledge,¹ 6,5 points, which is understandable before the training period, while the best grades are of text-understanding – 8,5 point² in average.)

¹ These areas have been measured with 6 indicators: theoretical knowledge, writing skills, counting skills, text understanding, dexterity and manual skills

² The interval of the scales is 0-10 in all cases, where the low grades present unfavorable, the highest ones present favorable evaluation.. In case of theoretical knowledge for example:

How do you feel at the present time about your **academic knowledge about the profession** learned/to be learned during the programme? Please assess on the scale of 1-10, where 0 means that you lack all academic knowledge, and 10 that you have deep academic knowledge. Of course you can use the intermediary grades too!

I lack all academic knowledge		I have really deep academic knowledge	I cannot assess it
0	1	2	3
4	5	6	7
		8	9
		10	99



– Communication skills:³

The evaluation of the initial state of communication skills is much diverse, but in all areas of the analysis in total and in average it is rather unfavorable. The success of finding a job - in most of the cases – depends on the aid of friends. This clearly shows that - among others – the partnerships are of significant importance. In the case of the long-term unemployed, we often observe that their relationships become narrow or definitely closed. The lack of interest about others' problems, as well as the lack of sharing their problems with others can all go along with this closeness. The participants' self-evaluation related to these indicators has squarely pointed out these unfavourable processes (average: 6,33 and 7). Very few of them seldom use the modern communication instruments (which besides being the tool of maintaining relationships, show the innovative character of the person as well). This could be linked to the financial status of the participants. According to this, the frequency of using e-mail (1,67) and SMS (4,1) are both very low. The participants' knowledge in foreign languages is incomplete as well (3,75), and the ability to lead others is also evaluated to be weak (4,5).

³ This area has been measured with 11 indicators: interest towards others' problems, frequency of sharing problems with others, aggressiveness, being understood by others, understanding others, ability of writing a letter, usage of mobile phone, usage of e-mail, usage of sms, foreign language skills, ability to lead others.

– Medical state, appearance, clothing⁴

The permanent state of unemployment, the closing of relationships and the feeling of worthlessness (in many unemployment cases) may lead to an unfavourable mental and medical state, which can further diminish the chance of finding a job. This turned out to be the same in case of this target group as well: although the medical state (6) and appearance (6,5) both got relatively bad points, the recognition of the clothing's importance (8,1) is obvious and they took care of it (8,17).

– Time-consciousness and reliability⁵

Research carried out among long-term unemployed often reports about the turnover of time-structure (although among women this phenomena is much rarely presented due to time-structuring character of household activities). Punctuality, the completion of tasks before deadlines and reliability are all central elements of preparation for employment, and at the same time they are absolute conditions to stay in a workplace. In the initial phase of the programme these elements are relatively well evaluated: in average they got 7-8 points.

At the end of the programme the following transformations could be observed in the self-evaluation of the participants (Chart 1):

- Compared to the initial state the evaluation of counting and reading skills turned out to be better, which is probably closely related to regular learning and training attendance)
- They seemed to be much more confident regarding their dexterity and future of getting a job
- They became more open-minded, they are interested in others' problems and according their experiences people understood them much better. (This openness is obviously linked to the broadness of their relationships, which is an inevitable result of their participation in the training. Nevertheless it is also a favourable basis for their societal re-integration.) Regrettably there has been no change in the use of communication tools – the only exception is SMS – writing.
- Useful activity, the feeling of being important, the increase of self-confidence, companionship and the feeling of be a part of something have all improved the evaluation of their medical and mental health, besides they take more care of themselves (they also go to doctor in case a medical problem arises).
- Permanent activity pursued in the framework of rules led to a perceptible amelioration even in the areas which are seen as absolute conditions of their successful re-integration into the job-market and their carrier, such as: ability of completion of tasks before deadlines, appropriate time-structuring and reliability.
- Nevertheless, the fact that we cannot report on the significant amelioration of theoretical knowledge shall make the training-organisers rethink the programme.

⁴ This area has been measured with 8 indicators: evaluation of medical and mental state, harmful addictions, proper treatment of health problems, satisfaction with appearance, importance of clothing, tattoo/piercing, properness of clothing.

⁵ This area has been measured with 5 indicators: frequency of being late, completion of tasks before deadlines, time-structuring, consideration before making decisions, reliability

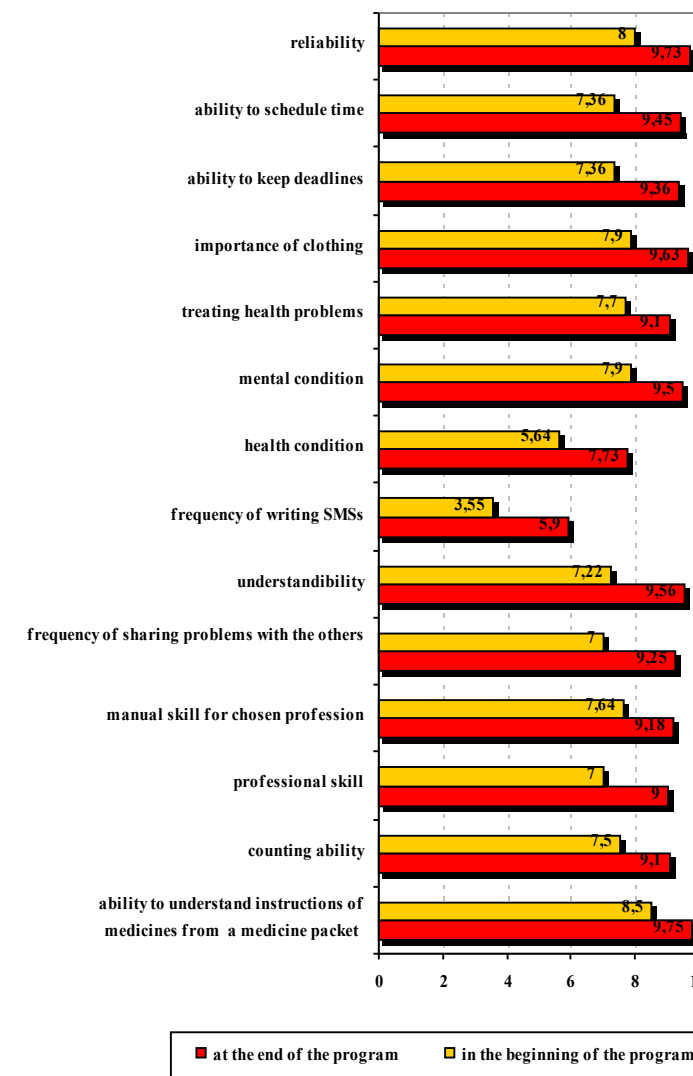


Chart 1. Significant changes regarding soft indicators in the participants' self-evaluation (average on a 0-10 scale)

Changes in the evaluation of trainers regarding participants

The trainers observed remarkable changes in the following areas:

- ▶ Increasing openness and relationship skills of the participants.
- ▶ At the end of the programme they evaluated the trainees healthier.
- ▶ According to their evaluation, the neatness and appearance of beneficiaries had increased a lot, and the trainers' impression on the participants clothing had also increased. The proportion of those who show weird or provocative behaviour has also decreased.

- They observed definite amelioration in case of elements of work-socialisation such as punctuality, keeping deadlines and the ability to suitably manage time.
- On the other hand they also have not experienced a definite change in theoretical and vocational knowledge.

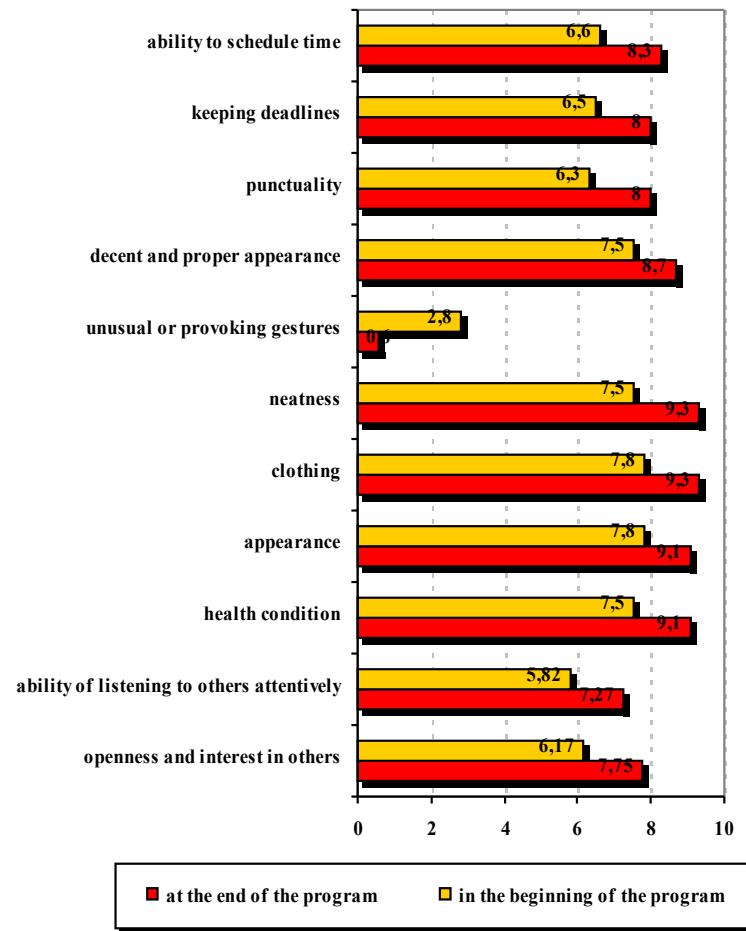


Chart 2. Significant changes regarding soft indicators in the trainers' evaluation of the participants (average on a 0-10 scale)

DIFFERENCES BETWEEN SELF-EVALUATION OF THE PARTICIPANTS AND THE EVALUATION OF THE TRAINERS

The analysis of the areas where the two aspects of evaluation differ may also give us information of great value. (Chart 2)

Among the 30 indicators of the four analysed area, the Hungarians observed a significant variance in case of seven indicators at the beginning, and in case of six indicators at

the end of the programme (which appears to be definitely auspicious, though in case of certain indicators the trainers have not formed any evaluation).

- In the area of theoretical knowledge and skills both at the beginning and at the end of the programme, we observed significant deviation between the evaluations of the two groups. In both cases, the judgement of the trainers turned out to be much worse. The ratio of dissension has increased by the end of the programme, which is derived from the fact that in these areas the participants have perceived definite amelioration, while the trainers have not.
- While at the beginning the participants evaluated their dexterity needed for their future job bad, by the end of the programme this increased a lot – that derives from the amelioration of their self-esteem and self-confidence as well.
- Although according to both groups' estimation, the ability to understand others has increased, the amelioration observed in the target group has increased much more than in the group of trainers.
- At the beginning of the programme the trainers have overrated the participants' communication skills, which obviously shows their lack of knowledge regarding the target-group, nevertheless at the end they revised their evaluation according to reality.



Although the trainers observed the amelioration of skills and abilities in a number of areas, in most of the cases the participants' self-evaluation has increased much more, and this fact obviously shows the participation's positive affection on strengthening personality and increasing self-confidence.



		In the beginning			At the end		
		Trainer average	Participant average	Difference (trainer-participant)	Trainer average	Participant average	Difference (trainer-participant)
Academic skills	Reading comprehension—understanding written instructions belonging to medicines	5,42	8,5	-3,08	5,92	9,75	-3,83
	Counting skill—counting skill	5,36	7,36	-2	6,27	9,1	-2,83
Manual and technical skills	Manual skills for future employment—evaluation of manual skills for the learned profession	No significant difference between the assessments of the trainers and the participants			6,73	9,18	-2,45
Communicating skills	How tolerant/aggressive is he to others—he becomes angry on others easily	9,09	7,18	1,91	8,92	6	2,92
	Ability to express his own thoughts clearly—is he easily understood	No significant difference between the assessments of the trainers and the participants			6,36	9,18	-2,82
	Understanding others’ thoughts—can he easily understand others	6,17	7,83	-1,66	6,8	9,4	-2,6
	Communicating in letters—hardness of writing letters	5,67	7,67	-2	No significant difference between the assessments of the trainers and the participants		
	Electronic mail—frequency of using emails	6	1,67	4,33	No significant difference between the assessments of the trainers and the participants		
	Using SMS-service—frequency of writing SMSs	8,67	4,1	4,57	No significant difference between the assessments of the trainers and the participants		

Chart 3. Differences between the self assessment of the participants and the evaluation of the trainers in the beginning and at the end of the programme.

POISE Project, Northern Ireland

For the purposes of this transnational comparison, the results came from the project’s First Steps Programme for women who were studying towards an Induction to Management in Learning Disability Services qualification. The results from this programme were used as project staff were able to build up a relationship with the individuals over the six months of the programme.

All EQUAL Funded projects in Northern Ireland are required to measure soft indicators using an assessment tool, the Rickter Scale®.

The Rickter Scale® provides projects with an innovative hands-on assessment and evaluation tool. It engages the clients particularly effectively; partly because the process engages the senses of sight, hearing and touch simultaneously, and partly because the focus of attention is removed from the interviewer and indeed the ‘interview situation’ to the Rickter board itself.

Its effectiveness stems from the fact that it is -

- Easy to administer.
- Instantly engages the client.
- Helps to overcome communication barriers.
- Produces quality information in a short period of time.
- Profile immediately available for action planning.
- Offers standardisation.
- Provides adaptable - initial assessment, monitoring and evaluation information.
- Helps identify appropriate support.
- Adapts to different client groups/needs.

The Rickter Scale® allows clients to:

- Better understand their present circumstances,
- Identify priority areas for support or intervention,
- Recognise strategies that have worked for them previously and to explore future possibilities.

This unique tool has been created for practitioners by practitioners, with a minimum of recording documentation. What it does measure is ‘distance travelled’: the soft outcomes that clients achieve, e.g. in dealing with barriers to employment, training or education, by overcoming limiting beliefs, and gaining confidence and self-esteem.

Down the left-hand side of the board are the headings that make up the Frame of Reference, reflecting the clients’ issues – and alongside each heading a horizontal scale from ‘0’ to ‘10’. Beneficiaries are asked a question about each heading and are asked to move the slider to where they feel it best shows their answer – where it represents what they are thinking. So, each answer may be 0,1,2,3,4,5,6,7,8,9 or 10, wherever they feels best answers the question.

Using the Rickter Scale®, individuals are empowered to make informed choices and set goals which are realistic and achievable, to take responsibility for their own action plans and determine the level of support they need.

It is at this point that the Rickter Scale® demonstrates the effectiveness of the client beyond isolated problems, incidents and behaviours to deeper patterns, i.e. systems thinking. When clients can see 'the big picture', and understand the connections between events in their lives, they are better able to influence them.

Eleven beneficiaries were interviewed at the start of the programme to establish a baseline and a desired position. Nine beneficiaries completed the programme and, at the time of this analysis, eight women had been interviewed to review their baseline and measure the distance travelled since the start of the training programme. The questions below were developed for women as part of the POISE Project.

1. Basic Skills

How much support do you feel you need with basic literacy and numeracy skills to achieve a management role? Ten you need a lot of support with basic literacy and numeracy skills. Zero you need no support at all.

2. IT

How confident are you using information technology? (For example: email and Internet) Ten you are very confident using information technology. Zero you are not confident at all.

3. Confidence

How confident are you about managing and supporting staff within a learning disability service? Ten you are very confident about managing and supporting staff within a learning disability service. Zero you are not confident at all.



4. Time Management

How capable do you feel in managing the balance between your work, home and social activities? Ten you feel very capable in managing the balance between work/home/social. Zero you feel you are not capable at all.

5. Promotion

How confident do you feel about making progress towards getting a management/ supervisory position within learning disability services? Ten you feel it is very easy for you to make progress towards getting a management/supervisory position within learning disability services. Zero you feel it is not easy at all.

6. Awareness

How aware are you of the responsibilities involved in the management of a learning disability service? Ten you are very aware of the responsibilities involved in the management of a learning disability service. Zero you are not aware at all.

7. Communication

How effective do you feel your communication skills are for a management role within learning disability services? Ten you feel your communications skills are very effective for a management role. Zero you feel they are not effective at all.

8. Safe Practice

How happy are you with your level of skills to manage a safe environment for all individuals accessing learning disability services? Ten you are very happy with your level of skills to manage a safe environment. Zero you are not happy at all.

9. Person Centred Practice

How satisfied are you with your level of skills for adapting/developing learning disability services to suit individual needs. Ten you are very satisfied with your level of skills for adapting/developing learning disability services to suit individual needs. Zero you are not satisfied at all.

10. Reflective Practice

How able are you to reflect on past experiences that will assist you in a management role within learning disability services? Ten you are very able to reflect on past experiences that will assist you in a management role. Zero you are not able at all.

All the women who participated in the programme are currently working in the care sector supporting people who have a learning disability. They can be split into the following services:



	Started Programme	Completed Programme
Training & Resource Day Centre	4	3
Supported Living Scheme	6	5
Advisory Service	1	1

Based on the areas that the partners agreed to compare, the following analysis was made:

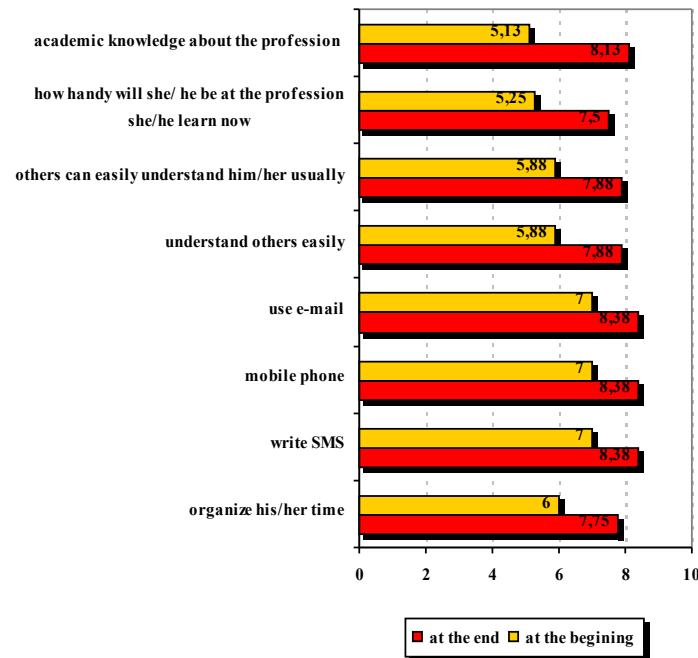


Chart 4. Significant changes in the participants' self-judgment respecting soft-indicators (average on the scale of 0-10)

On average, the beneficiaries have progressed in each area during the period of the programme, the most significant increase is in their knowledge of the manager's role within a learning disability service. No analysis was carried out by the tutors teaching each of the modules as they had not met the majority of the beneficiaries before the programme started and had not had sufficient time to form a significant evaluation of the areas agreed.

The beneficiaries on the First Steps programme completed five modules:

- Understanding learning disability services
- Communication within a learning disability service
- Safe practice and protection from harm within a learning disability service
- Person centred planning within a learning disability service
- Personal development and reflective practice

Nine beneficiaries completed the first programme and achieved the following results

	Distinction	Merit	Pass	Refer
Understanding learning disability services	4	3	3	0
Communication	1	8	0	0
Safe practice and protection from harm	1	5	3	0
Person centred planning	1	2	5	1
Personal development and reflective practice	2	3	4	0
Total	9	21	15	1

Chart 5. The marks of the participants after the training

One beneficiary made the following comment on her experience of the programme:

"I feel that the first steps programme has benefited me greatly by developing and increasing my knowledge in the more managerial side of Learning Disability Services. It has improved my practice by focusing my attention on the way forward for such services and has given me an understanding of the importance in moving forward positively, e.g. being proactive in ensuring a person centred approach. I also feel that I would now be better equipped to proceed further in my career within the Learning Disability Services as a direct result of the knowledge and self-confidence I gained from taking part in the HPD course."

Since the programme started, two beneficiaries from Programme 1 have obtained promotion to Deputy Service Manager and another to Acting Deputy Service Manager. This equates to 33% of the beneficiaries who have completed the programme.



UNIVERSO DONNA Project, Italy

The evaluation of the Universo Donna project analysis, especially the analysis of the "Promoter Sociale" training course, is to determine the course effectiveness and the learners' satisfaction level. It joins in work field carried out by international group concerning "soft indicators".



PRAXIS AND TOOLS

Specific questionnaires have been processed on the basis of examined models and arranged during international meeting. These questionnaires have been given "from – at the beginning" course.

In particular:

- ▶ "Personal data"
- ▶ "Participant feedback"
- ▶ "Participant self evaluation"
- ▶ "Expert evaluation"

PARTICIPANT DATA

This data sheet was used in order to collect information: both personal data and working or family status of participants. Moreover, it has helped us to understand the reasons why attend this course and their future expectations. We have resolved to insert this information because it allows to determine, in subsequent checks and in an impartial way, the capacity of the course to learn and encourage occupation.

Here a results summary:

Participants	n. 13 women
Average age	26-30 years old (only 10% age between 44 and 50 years)
Qualification	80% university degree, 20% high school qualification
Working status	60% unemployed, 20% students; 20% workers
Family status	only 20% dependent
Reasons	Interest in new abilities
Expectations	More occupational opportunities

Chart 6. Summary of 'Personal Data' Collated from Participants on Universo Donna

The report brings out the fact that the participants are young women with a high school education, most of them unemployed (even if they have worked for contract position) with good family conditions. All the participants are driven by interest in new experience, learning, abilities especially planning for the social field. This because it could provide more working chance. In fact the main expectations are in this last aspect: occupation in this field.

PARTICIPANT SELF EVALUATION AND EXPERT EVALUATION

Six spheres were considered concerning academic knowledge, abilities, technical and manual skills, communication, time consciousness and reability, familiar condition.

A picture of the participants, characterized by elevated knowledges and skills, comes out from that survey of which we take a synthesis below.

Such self-evaluation, it has been confirmed by the results of the expert evaluation.

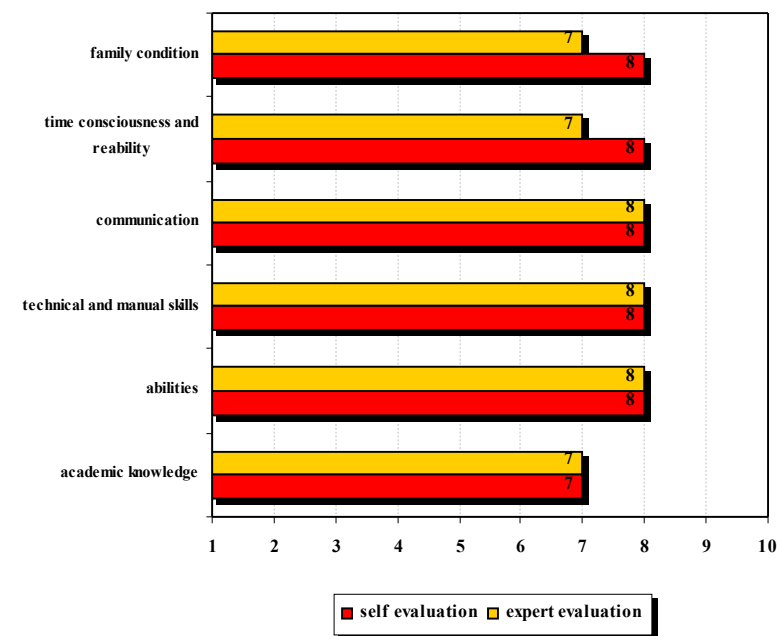


Chart 7. The results of the self evaluation and the expert evaluation.

The questionnaire of "self evaluation" has been submitted to the students during the course, excluding the early possibility of two evaluations (one of which at the beginning of the course). This choice is due to the fact that we have thought the course would have not influenced a lot the spheres of which over.

The questionnaire of the experts had as objective that of collecting information, in a standard way, on students' cognitive and behavioural spheres asking the perceptions to



the teachers. In this case, given the structure of the course and the layout of every single modules, it has been decided to submit, at the end of the course, the questionnaire to the tutor and not to the single teacher which could have taken just a partial vision. The tutor, instead, has succeeded in expressing a comprehensive judgment on every single student.

PARTICIPANT FEEDBACK

The questionnaire asked the participants about their opinion and their suggestions on

the training activities, teaching, contents, methodology, organization of courses, tutorship, respect of timetable (duration of courses).

The questionnaire aimed to take information about the quality of courses and the students’ satisfaction. It has been given to the students at the end of courses and included both open and closed questions.

Students were asked to evaluate on many aspects:

- Professionalism of teachers and tutors (average score 9/10)
- Quality of work of teachers and tutors (average score 8/10)
- Duration of courses (average score 6/10)

Moreover, an assessment of the level of satisfaction for each module has been asked (scoring from 0 to 10)

Programmes	Assessment	Satisfaction
Communication and Human resources	8/10	9/10
Politics-law	8/10	9/10
Organization	7/10	8/10
Economy	6/10	6/10
Project management	9/10	9/10
Practice	7/10	8/10

Chart 8. Evaluation of individual programme elements



As seen in the table above, a good level of satisfaction emerged

A series of open questions were asked to give information about strengths and weaknesses of the course. Strengths of the courses were: outstanding organization, good professionalism of teachers and tutors, and a good project management module. Weaknesses, on which we will have to work on in the next years are: the lack of activities linked to the knowledge of territory and of contacts with local bodies.

There is a general opinion about the need of coupling the theory with more practical activities. Suggestions there are in fact on spending less time in classrooms and having more contacts and knowledge on the territory (e.g. training days within the cooperatives, 5 on 13).

Concilia Project, Spain

	Mean (0-10)
How much support do you feel you need with basic literacy and numeracy skills to achieve a management role?	3,88
How confident are you using information technology?	7,59
How confident are you about managing and supporting staff within your department?	7,59
How capable do you feel in managing the balance between your work, home and social activities?	6,18
How do you think this course will help you to improve your ability to carry out your work?	8,65
Do you usually meet your task deadlines?	8,47
How effective do you feel your communication skills are for a management role within your work?	7,18
Can you speak any foreign languages?	6,29
How satisfied are you with your level of skills for adapting/developing services to suit target group needs.	7,29
How able are you to reflect on past experiences that will assist you in a management role within your work?	8,00

Chart 9. Average results on each field of the survey

In the case of Concilia project, the soft indicator assessments were applied on the following fields:

1. Basic Skills

The need for external support on mathematical skills and linguistic skills for the development of project management tasks or on a job is low, as it corresponds to a highly educated population

2. Information Technology

The use of ICT knowledge is high among participants. However it still needs to be improved

3. Confidence

Participants give value to the team building and staff management with all their IT knowledge. This might be due to the fact that they may not develop those functions

4. Time Management

The evaluation of work life balance is superior at 60%. This might be due to the fact that they have dependants

5. Promotion

The majority of participant’s believe that this course will allow them to improve their skills at their work.

6. Time consciousness and reliability

They majority of participants achieve their deadlines and working commitments.

7. Communication

The evaluation of efficiency in language skills at work is high but lower than the use of IT or time management therefore this skills may need to be improved.

8. Communication-languages

Some people are highly prepared in languages skills but there is a great disparity so the average decreases to 60%.

9. Working with beneficiaries

Participants show a satisfaction when they do global capacities and services management focussed on beneficiaries. However as it happens with the languages communication this abilities may be improved

10. Reflective Practice.

All participants show a great ability for learning from previous experiences (80%)

CONCLUSIONS

Rational, evidence-based policy-making and project-management make special claims on those who plan, execute, and evaluate projects. Besides the thorough assessment of circumstances, the determination of adequately ambitious albeit realistic forms of possible intervention, and the cautious selection of effective tools of execution, it is also inevitable to use such indices and indicators which can facilitate to survey processes, evaluate partial results, and to apply monetary and professional “accounting systems,” which arrange the indicators in a perspicuous, accountable, and controllable system.

In the framework of our transnational cooperation it was proved that besides this, it is also worth to apply difficultly measurable and subjective indices, if we cannot express the development with harder and more objective indices and data in the case of

an important particular target or content. Beyond all comparison, it is better to apply measurement methods based on subjectively distorted estimations and experience to express substantive contents and essential changes, developments than not to measure at all.

As seen in the present study, the DPs of the 'Balance' Partnership planned to meet the needs of different target groups could use soft indicators with success for evaluating their activities. However, these determinant structural differences resulted in such differences in the measurement tools which did not allow to comparing the results. Therefore, it was proved that similar soft indicators can become hard and effective if a consensus is reached by those who work in the programme.

However, the fact warns us to be modest that the usage of soft indicators also requires such a kind of similarity and homogeneity of contents which enables similar tools, supporting the project management or even compared to each other, serve the successful execution of the programme.

Chapter Two

Comparison of National Rules, Legislation, Practices and Experiences on Equal Opportunities in the Labour Market

by Victoria Gómez, Katalin Ábrahám, Ana Espinar, Sandra Steele, Anne Campbell, Agnes Lunny, Claudia Troiani, Giulia Giampietri, and Lorna McKee

INTRODUCTION

OBJECTIVE

The purpose of Working Group 2 is to compare the legislation in relation to Equal Opportunities of men and women in the labour market.

The final output of this comparison is to identify new ideas and to share the information among the participating partners in order to identify best practices and to implement them when possible.

For almost fifty years, the European Union has been developing a policy of equal opportunities for men and women. Each country, nevertheless, has a different approach for tackling discrimination in the Labour Market.

Following discussion among the Balance Partners, it was agreed that the focus of our work would be narrowed to a comparison of how the policies in each country operate to achieve the best work/ life balance.

METHODOLOGY

Initially during the transnational meetings, all partners provided a brief outline of what happens in their countries:

- How the legal system is organised,
- How the legal system operate in the fight against discrimination, and
- Details of gender policies for the promotion of Equal Opportunities in the labour market.

Secondly, the partners tried to define what “Work-Life Balance” means in each country and agreed the following working definition:

Work-life balance is about the interaction between paid work and other activities, including unpaid work in families and the community, leisure, and personal development.

Work-life balance is about creating a productive work culture where the potential for tensions between work and other parts of people’s lives is minimised. This means having appropriate employment provisions in place, and organisational systems and supportive management underpinning them, for both male and female employees.

Work-life balance for any one person is having the ‘right’ combination of participation in paid work (defined by hours and working conditions), and other aspects of their lives. This combination will not remain fixed, but may change over time.

Thirdly, a more in depth analysis was conducted in order to identify differences and similarities among countries **on matters relating to the “equality of treatment and equal opportunities for men and women at work”**.

The issues studied in depth were:

1. *Maternity benefits, leave and pay*
2. *Child care aid*
3. *Child care education benefits*
4. *Paternity benefits, leave and pay*
5. *Flexible working hours*
6. *Compassionate leave - a reduction in the working day to take care of a seriously ill relative*
7. *Other financial supports*



A grid was created in order to compare all of these issues among the different organisations that constitute the Development Partnership of each country. See Appendix / Table

OUR FINDINGS

Initially it was very difficult to compare the legislation because the situation in each country is arranged quite differently. Legal systems are different and what is most important, the way law is originated and applied is also determined by the economic and social situation that pertains in each country. The judicial system in each country, along with traditions, stereotypes and trends at work are not similar enough to make easy comparisons possible.

Furthermore, the situation in each project is quite diverse in each region of Europe. While in the project managed by POISE (Northern Ireland), the objectives are focussed on men gaining employment in the care sector labour market and women progressing to management positions; in the project Inspiral (Hungary), the project is directed towards the reintegration of women into the labour market. In Camp de Turia Concilia (Spain) and in Universo Donna (Italy) the situation is quite similar, but legislation in Spain is quite innovative, for example, they even have measures supporting fertility treatments.

In response to these difficulties in comparison, the partners adopted a very pragmatic approach and decided to concentrate on the following questions:

1. How are women supported to have a baby?
2. How are women supported to get back to work after pregnancy?
3. How are women supported to care for dependants?

As previously explained, the partnership decided to collate the most significant maternity benefits from those we have identified in Appendix/Table 1. Nevertheless, this paper does not aim to make a comprehensive list of all available benefits, but rather to highlight the significant measures to share among the partners.

Specific rights granted by EU law

Pregnancy and maternity represent a period during which women are particularly vulnerable in terms of their safety and health in the workplace. Women are therefore protected by Community law and national provisions against specific risks linked to their condition, while preventing it being used as an excuse for discrimination in the workplace. As shown in these papers, legislation and protective measures related to these issues are different in the countries involved in this project, and furthermore these differences exist across the European Union. So, in order to ensure that citizens are sufficiently protected before and after giving birth,

whatever country they are working in, Community law grants a series of specific rights⁶. These rights aim to protect women's health and safety in the workplace, to grant them a minimum period of leave and to protect them against unfair dismissal. These have been used as a reference for the legislation comparative among the partners involved in this study.

Health and safety in the workplace

Female employees who are pregnant, have recently given birth or are breastfeeding, have the right to a certain level of health and safety in the workplace. In order to benefit from such a right, workers must inform their employer of their condition.

For work liable to involve a specific risk of exposure to certain dangerous agents, processes or working conditions, employers are required to assess the risks to the safety or health of pregnant workers, workers who have recently given birth or are breastfeeding, and any possible effects on their pregnancy or breastfeeding.

Once this assessment has been done, employers must inform workers and/or their representatives of the results. If there are any risks, employers must take the necessary measures to ensure that exposure to such risks is avoided. Employees cannot be obliged to

perform duties for which the assessment has revealed a risk of exposure which would put their health and safety in jeopardy. This must be done by temporarily adjusting either working hours or working conditions.

If adjustment of working conditions and/or hours is not possible, then employers must make changes to job positions.

If these changes to job positions are not possible, employees have the right to be granted leave in accordance with national legislation and/or practice for the whole period necessary to protect their health and safety. During

this leave their employment rights, including the right to payment or an adequate allowance, are maintained in accordance with national legislation and/or practice. The right to payment or an allowance may be subject to their fulfilling eligibility conditions which cannot be provide for a period of previous employment of more than 12 months.

Night work

It is necessary to protect health or safety of employees, they may not be obliged to perform night work during pregnancy, nor during a period following childbirth, the length of which is determined by the national authority in charge of health and safety. Employees would be required to provide a medical certificate to show that night work could affect

their health and safety. If this applies, employees must be transferred to daytime work. Where a transfer is not possible, leave from work or an extension of maternity leave must be granted, according to national legislation and/or practice. During this leave the employment rights, including that of a payment or an adequate allowance, are maintained in accordance with national legislation and/or practice. The right to a payment or an allowance may be subject to fulfilling eligibility conditions which cannot provide for a period of previous employment of more than 12 months.

Maternity leave

Whatever country you are working in, employees who are pregnant, are entitled to a continuous period of maternity leave of at least 14 weeks. This period must include compulsory leave of at least two weeks after the birth.

Women on maternity leave do not necessarily receive full pay, although they must receive any pay rise awarded before or during maternity leave. The amount of maternity pay is fixed by the national legislation of the country they are working in and must be at least equal to the value of sick pay. This right is granted, provided employees fulfil the conditions of eligibility for such benefits as laid down by national legislation. In any case, the maximum length of previous employment which can be required is 12 months.

Time off for antenatal examinations

Employees have the right to take time off, without loss of pay, in order to attend antenatal examinations where these can only be carried out during working hours.

Prohibition of dismissal

Employees cannot be dismissed on the grounds of being pregnant during the period from the beginning of their pregnancy to the end of maternity leave. Nevertheless, dismissal is possible during this period under exceptional circumstances not connected with the condition where this is permitted under national legislation and/or practice, or if the employer can provide valid reasons for the dismissal in writing (in some Member States, the employer needs an official authorisation). If the employer claims that the tasks the employee perform are essential to the operation of the business during the maternity leave, this is considered insufficient grounds for dismissal.

Parental leave and time off for urgent family reasons

Measures such as parental leave and urgent family leave are also important because they help women and men reconcile their obligations arising from their working and family lives.

Community legislation implements an agreement concluded between representatives of both sides of European industry under the Union's agreement on social policy.



⁶ Source: European General Guides. European Comisión.2007.

Parental leave

As a working parent in the EU, male employees have an individual right to parental leave, on the grounds of the birth or adoption of a child, to allow them to take care of that child for at least three months. The maximum age of the child in respect of which this leave can be taken varies by country.

Both parents are entitled to parental leave and there should be no discrimination in any country as to whether it is granted to the father or mother. However, although both parents are entitled to parental leave of three months, one parent cannot transfer the right to parental leave to the other.

At the end of parental leave, an employee has the right to return to the same job or, if that is not possible, to an equivalent or similar job consistent with their employment contract or employment relationship.

When the employee wants to take parental leave, they may be required to give adequate notice and to indicate the date on which the leave will begin and end.

If, when the parental leave starts, the employee has acquired or is in the process of acquiring certain rights, such as those relating to retirement, these rights will be preserved until the end of your leave.

The detailed provisions about parental leave (e.g. pay, periods of notice, employer's right to postpone leave, etc.) vary according to the country the employee is working in but must comply with the minimum requirements laid down in the framework agreement on parental leave.

Time off for urgent family reasons

Employees have the right to take time off from work in cases where the sickness or accident to a member of your family requires your immediate presence. The law of the country they are working in defines the conditions to be fulfilled in order to exercise this right, as well as the amount of time per year and the circumstances in which they are allowed to take urgent family leave.

COMPARATIVE ANALYSIS

In relation to the question : *How are women supported to have a baby*, as discussed during the meetings held across all the countries participating in this study obtained results which show these results

Pregnancy Support

In Northern Ireland

All pregnant employees are entitled to time off for antenatal care. All time off for antenatal must be paid at the employee's normal rate of pay. Antenatal care may include relaxation

and *Parentcraft* classes, as well as medical examinations. These rights apply regardless of the employee's length of service.

In Hungary

The maternity-childbed leave and aid can be received partly or fully during the pregnancy, see below, under "Maternity Leave and other Benefit Measures".

In Italy

Maternity leave starts two months before the estimated date of birth of the child, pursuant to Law 53/2000. This period can be advanced if there are serious complications during gestation, by provision of the Provincial Inspectorate of Labour (law 1204/71 art. 5). Some medical examinations (Ultrasound Scanning on the first two months, and during the V and VII month of gestation) are free, as well as some toxicological exams: in particular some examinations could depend on the Regional regulations. All the examinations for the high-risk gestation are free, if there is a specific doctor's document.

Spain

All pregnant employees are entitled to paid time off during the working journey for prenatal care and examinations, including childbirth classes.

If there's any risk during the pregnancy period, changes in the labour conditions or even a change of job position in the company would apply.(See Risk during pregnancy heading)

Maternity Leave and other Benefits Measures

NORTHERN IRELAND

Public Legislation called:

Employment Rights (NI) Order 1996;

Employment Order (NI) 2002 and Work & Families (NI) Order 2006

Public Bodies

North & West Belfast Trust / Ulster Community & Hospitals Trust - Both Health & Social Services Trusts funded by the state

Eligible employees are entitled **to a total of 52 weeks leave(statutory), 39 weeks paid and an additional 13 weeks unpaid leave:**

- (i) For the first **eight weeks of absence**, the employee will receive **full pay**, which includes any Statutory Maternity Pay or Maternity Allowance (including any dependents' allowances) receivable;
- (ii) For the **next 18 weeks**, the employee will receive **half of full pay plus any Statutory Maternity Pay or Maternity Allowance** (including any dependents' allowances) receivable, providing the total receivable does not exceed full pay.

- (iii) For the **next 13 weeks**, the employee will only receive statutory maternity pay
- (iv) The remaining 13 weeks additional leave will be unpaid

Private companies

Association for Real Change (ARC)

ARC is an umbrella organisation that brings together those who provide services for people with a learning disability.

Maternity leave and pay are in line with current legislation:

Eligible employees are entitled to 39 weeks at statutory maternity pay:

- First six weeks at 90% of average weekly earnings and
- Last 33 weeks at statutory maternity pay).
- Eligible employees are entitled to an additional 13 weeks maternity leave (unpaid).

Positive Futures

An organisation that supports people with a learning disability:

Eligible employees are entitled to **39 weeks paid leave, and 13 weeks unpaid maternity leave.**

- (i) For the first **eight weeks of absence**, the employee will receive **full pay**, including Statutory Maternity Pay or Maternity Allowance (including any dependents' allowances) receivable;
- (ii) For the **next 10 weeks**, the employee will receive **half of full pay plus any Statutory Maternity Pay or Maternity**
- (iii) For the **remaining 21 weeks** the employee receives Statutory Maternity Pay Allowance only (including any dependents' allowances) receivable, providing the total receivable does not exceed full pay.
- (iv) The remaining 13 weeks will be unpaid

All pregnant employees, regardless of their length of service, will be entitled to a week's pay (at their normal rate) on return to work after the baby is born.



Legislation or Statutory Regulations	Public Bodies	Private Bodies	
	(Health & Social Care Partners)	ARC	Positive Futures
39 weeks leave with pay: Wk 1-6 = 90% of full pay Wks 7-33 = SMP only	39 weeks leave with pay: Wk 1-8 = 100% of full pay Wks 9-26 = 50% of full pay + SMP Wks 27-39 = SMP only	39 weeks leave with pay: Wk 1-6 = 90% of full pay Wks 7-39 = SMP only	39 weeks leave with pay: Wk 1-8 = 100% of full pay Wks 9-18 = 50% of full pay + SMP Wks 19-39 = SMP only
13 weeks unpaid leave	13 weeks unpaid leave	13 weeks unpaid leave	13 weeks unpaid leave
Total of 52 weeks leave (paid and unpaid)	Total of 52 weeks leave (paid and unpaid)	Total of 52 weeks leave (paid and unpaid)	Total of 52 weeks leave (paid and unpaid)

The Statutory Maternity Pay, Social Security (Maternity Allowances) and Social Security (Overlapping Benefits) (Amendment) Regulations (NI) 2006, is available to view using the following link: <http://www.opsi.gov.uk/SI/si2006/20062379.htm>

This legislation will continue to require employers to maintain employment-related benefits during 'paid maternity absence', whether contractual or statutory, i.e. an employer is required to make pension contributions based on the full pay the woman would have received had she been working. When the new provisions came into affect from 1 April 2007, employers are obliged to provide employment-related benefits such as pension contributions, death in service benefit, retirement benefits, etc. after ordinary maternity leave has ended and during part (13 weeks) of the additional maternity leave period i.e. up to the end of the 39 week total. Hence, employers may get more than they bargained for in terms of pay obligations when these new maternity rules come into force.

In addition, it was recognised that employers often struggle with the extent to which they can contact employees who are on maternity leave without intruding on their personal time. The regulations have introduced "keeping in touch days" (KIT days), where an employee on maternity leave can carry out limited work for her employer. There can be up to 10 such days during statutory maternity leave, without the employee having her SMP stopped for the week in which the work occurs, as is currently the case. There are no restrictions on when KIT days can be used for statutory pay purposes therefore it is entirely a matter for the woman and her employer to agree how and when the KIT days

are used during her maternity pay period. It is important to note however that employers aren't obliged to offer work and employees aren't required to accept it. An employee will be protected from suffering a detriment or dismissal for accepting or refusing to accept offers of work from her employer.

IN HUNGARY THE PUBLIC LEGAL LEGISLATION

Name of the national Legislation called:

Law 84/1998 on the Support of Families

Law 22/1992 on Act of Labor

Law 83/1997 on Compulsory Health Insurance

Provisions

1. Pregnant women receive 24 weeks maternity leave (szülési szabadság), which can start during pregnancy but four weeks before the estimated date of birth at latest, and continues after the birth. During this period she is entitled to maternity-childbed aid.

2. The employed parent (including adoptive parent) is entitled to unpaid leave (fizetés nélküli szabadság):

- until the child reaches the age of three for the purpose of home nursing; Job is kept.
- until the child reaches the age of 10, while child care aid is granted if the employee the child at home (if the child is permanently ill or in case of twins); Job is kept.
- until the child reaches the age of 12, in case of the illness of the child, for the purpose of home care. Job is kept.

3. If a parent loses his/her ability to work, they are entitled to sick-allowance (táppénz) during the disablement. Disabled is

- the woman who can not work because of her pregnancy or child-birth, and is not entitled to maternity-childbed aid;
- the mother who breast-feeds her child who is younger than one year old and is under hospital care;
- the father, or fosterer who attends his ill child younger than one years old;
- the parent, who cares his/her ill child younger than 12 years old.

In this case the number of days per year after each child:

- In case of 1-3 years old child 84 days
- In case of 3-6 years old child 42 days, but if the parent lives alone, 84 days
- In case of 6-12 years old child 14 days, but if the parent lives alone, 28 days.

The amount of the sick-allowance is adjusted on the base of the daily average salary.

4. After the birth, the father and the adoptive parent receives 5 days leave.

5. The breast feeding woman is entitled to a reduction of two hours of working time during the first six months of the breast feeding. After the end of the 9th month, the woman is entitled to one hour. These hours are considered working hours. The mother bottle-feeding her baby and the adoptive mother also receives this working-time reduction.

6. Extra leave (pótszabadság)

According to the decision of the parents, the employee (parent) bearing a greater part in the child care or the parent nursing the child alone receives extra leave until the child reaches the age of 16. Duration:

- after 1 child - 2 days,
- after 2 children – 4 days,
- after more than 2 children altogether – 7 working days.

The adoptive parent is also entitled to this extra leave.

Benefits

1. A mother is entitled to receive maternity benefit (anysági támogatás) after the birth if she took part in at least four prenatal care sessions during the pregnancy. In special cases, the father or the guardian or the adoptive parents are entitled to this benefit in place of the mother. The amount is equivalent to 225% of the minimum old age pension (58050 HUF) (€236,15).



2. The pregnant woman receives maternity-childbed aid (terhességi gyermekágyi sagely) during her birth leave, which is 70% of her average salary. After the adoption, the adoptive mother is also entitled to receive this maternity-childbed aid. After the maternity-childbed aid, if one of the parents does not work and stays home to nurse the child, he/she is entitled to child care fee (gyermekgondozási díj) until the child reaches the 2 years of age. The amount of this monthly fee is 70% of the salary, up to a maximum of 87.500 HUF (€355,95). After the child has reached the second year, or if the parent decides to go back to work before that time, but not after the first year, child-care aid is received.

3. Child care aid (gyermekgondozási segély): Entitled are: the natural or adoptive parent, the spouse of parent, or the guardian, or after the 1st year of the child the grandparent. Duration: until the child reaches the age of 3. In case of twins, permanently ill or disabled child until they are 10 of age. Amount (monthly): the minimum amount of old-age pension (currently 25800 HUF), in case of twins this doubles. Together with this aid, no gainful employment can be undertaken until the child reaches the age of 1 year (except in case of the guardian). In case of the grandparent the age limit of the child is 3 years of age.

IN ITALY THE PUBLIC LEGISLATION OFFERS

“Act on Maternity and Paternity Leave” L. 53/2000

Eligible workers are entitled to five months leave with full pay. This period may be distributed as two months before birth and three after or, one month before birth and four months after birth.

In case of a premature birth, compulsory leave is extended after the birth by the number of days of advance, upon a given request and a birth certificate (art.11 L. 53/2000); in fact, the days not enjoyed before the birth are guaranteed after the birth.

Mothers and fathers who are dependant workers, during the first year of a child’s life (including cases of adoption or granted custody) have the right to benefit from:

- 2 hours a day if their working time is equal or exceeds 6 daily hours;
- 1 hour a day if their working time is lower than 6 hours a day.

General optional leave

DESCRIPTION	MOTHER	FATHER	PARENTS	ONLY PARENT
Duration of optional leave	6 months (which can also be split up)	7 months (which can also be split up)	11 months in total	10 months (which can also be split up)
Eligible period (age of the child)	Before the 8 th year of age	Before the 8 th year of age	Before the 8 th year of age	Before the 8 th year of age
Leave periods paid before the 3 rd year of age	6 months	6 months	6 months in total	6 months
First month of optional leave pay	100%	100%		100%
Pay during the remaining first five months of optional leave	30%	30%		30%
Pay after the 3 rd year and up to the 8 th year of age	30% only if the annual income is lower than € 12.426,66 (€ 24.061.375)	30% only if the annual income is lower than € 12.426,66 (€ 24.061.375)		30% only if the annual income is lower than € 12.426,66 (€ 24.061.375)
Effects of optional leave	The first 30 days of leave with full pay are valid to all intents and purposes; the following periods are valid for seniority of service except holidays and 13 th	The first 30 days of leave with full pay are valid to all intents and purposes; the following periods are valid for seniority of service except holidays and 13 th		The first 30 days of leave with full pay are valid to all intents and purposes; the following periods are valid for seniority of service except holidays and 13 th

Working leave due to illness of the child

DESCRIPTION	MOTHER	FATHER	PARENTS	ONLY PARENT
Leave due to illness up to the 3 rd year of age	Limitless duration (in alternance with the husband) after having produced a medical certificate	Limitless duration (in alternance with the spouse) after having produced a medical certificate	Limitless duration after having produced a medical certificate	Limitless duration after having produced a medical certificate
1 st month leave pay (for every year of age) to attend to the sick child up to the 3 rd year of age	100%	100%		100%

Pay of the remaining period after the 1 st month of leave to attend the sick child up to the third year of age	0%	0%		0%
Leave due to illness of the child from the 3 rd to the 8 th year of age	5 days per year (in alternative with the spouse)	5 days per year (in alternative with the spouse)	10 days per year in total	5 days per year
Pay during leave due to illness of the child between 3 rd and 8 th year of age	0%	0%		0%
Effects due to leave for illness of the child up to the 8 th year of age	The first 30 days with full pay are valid to all intents and purposes; the following periods are valid for seniority of service except holidays and 13 th month instalment	The first 30 days with full pay are valid to all intents and purposes; the following periods are valid for seniority of service except holidays and 13 th month instalment		The first 30 days with full pay are valid to all intents and purposes; the following periods are valid for seniority of service except holidays and 13 th month instalment
Documents which have to be produced	Joined statement of the parents(or at least two statements of each), which show that the other parent is not on leave for the same reason.			

IN SPAIN THE PUBLIC LEGISLATION GATHERS

Law 39/1999, 5 of November to promote the work life balance.

Law 3/2007, 22 of March , to reach effective equality among women and men.

Law 39/1999, 5 of November to promote the work life balance.

Licenses in cases of Risk during Pregnancy or Breastfeeding period

Requirements: Pregnant female employees have to inform the company if working conditions imply any risks for her or her baby. They have to apply for a risk during pregnancy certification either directly from a doctor of National Health Services or a Mutual Insurance Company certificate, supported by a medical report from the National Health Service.

Benefits: Changes in working conditions affecting: the working schedule, changes in job positions, etc and other measures as an exclusion from night work or working shifts.

If those changes are not possible, the pregnant female worker will be declared under risk and will be paid an allowance from the Security Social System which will be equivalent to 75% of her salary. Dismissal during these licenses will be invalid.

Pregnancy and childbirth

Pregnant female workers have access to paid permissions for health controls and childbirth classes, with just two requirements: previous communication to the company supported by a certification of the need of receiving them during the working journey.

Maternity Leave

Requirements: Female workers applying to this leave will have to demonstrate a 180 day contribution period in the previous five years, to the Social Security System.

Benefits: Maternity leave: Period of 16 continuous weeks after childgiving. It could be accumulated in weeks per child from the second in multiple childbirth. The first six weeks after childbirth is reserved to the mother. The rest of the leave can be distributed in the most suitable way for the family (even simultaneously never exceeding the total leave 16 weeks or the proportional period for multiple childbirth), in cases were both parents work, and returning to work is not a risk to the mother’s health. As stated in previous agreements between employers and their workers in each case, maternity leave could be distributed in continuous full-time or part-time periods.

This leave would apply also in cases of fostering/adoption of children under six, and handicapped children or children involved in special circumstances above this age. In international fostering/adoption which require previous travelling to children’s native country a maximum period of four weeks previous to the beginning of the maternity leave would apply. During this leave dismissal would be invalid.

During the maternity leave the Social Security System will provide working mothers with an economic aid of 100% of the workers salary regular basis. If the employee doesn’t fulfil the demanded requirements for acceding to this allowance, the other parent will receive it in case he/she does.

Breastfeeding license

Benefits: One hour per day permission, or half hour reduction in the start/end of the working journey, for breastfeeding of a child under 9 months. This license could be requested by any working parent.

Premature children/newborn hospitalization:

Benefits: In premature children or newborn hospitalization, one of the parents will be able to take either one hour off from work per day or a reduction of the working journey up to two hours, with a proportional salary reduction.

10 week period posterior to the six compulsory weeks of the maternity leave could be started from the moment the baby is discharged from the hospital.



Working journey reduction due to family dependents

Requirements: Employees who take care of a child under six, a physically/emotionally/ or sensory impaired person without any economic income, have the right to reduce their working journey from a minimum of 1/3rd to a maximum of its 50% with the proportional salary reduction. Its an individual right but when both parents work for the same company, the employer could limit its simultaneous exercise.

Dismissal in this period will be considered legally invalid.

Leaves for childcare or family care

Benefits: Unpaid voluntary leave for childcare/childbirth/fostering and adoption during a three years maximum.

Unpaid voluntary leave for a maximum of one year in case of elderly and/or seriously ill relative (till second grade), with any economic income.

Characteristics: Reservation of job position during the first year (in childcare cases it will be considered as contributing to the Social Security System). From that period a reserve will only be referred to job positions of the same professional category or sector.

This leave will be considered in the Social Security System seniority variables, and workers will be able to join professional courses if required by the company. Dismissal will be legally invalid during this period.

Other paid licences

Benefits: A two day license in case of childbirth, and four days if it implies moving to other locations.

In case of a mother's death during childbirth, the other parent will be allowed to take the maternity leave period in total or for the lasting period.

A two day license in event of a relative's accident, serious illness, hospitalization or death.

A four day license in the cases stated above if they imply moving to other locations.

Dismissal will be legally invalid during these licenses.

Law 3/2007, 22 of March , to reach efective equality among women and men.

Risk during Pregnancy or Breastfeeding period

If there is any risk during the pregnancy and/or breastfeeding period, changes in labour conditions or even a change of job position in the company would apply.

If those are not possible, the pregnant employee would be considered under risk, and the Social Security System would provide her an economic allowance up to 100% of the regular salary, as in temporary incapacity.

This benefit will end when the childbirth takes place or when the baby is nine months old, except in cases were the beneficiary has returned to her job position or to a more suitable one.

Maternity leave

The length of the maternity leave has not been modified, but the requirements have changed: If the pregnant woman in under 21 at the moment of childbirth, fostering, or adoption it is not required any contribution period.

From 21 to 26: She has to demonstrate a 90 days contribution period within the last seven years, or 180 days along all her working career.

26 and more: 180 days contributed to Social Security System within the last seven years.

In cases where the mother wouldn't have access to economic aids in the maternity leave period, the other parent is allowed to exercise this right for the same period of time.

If the baby or child fostered/adopted has any disability, the maternity leave period will be extended to two weeks. These days could be distributed in separated periods for each parent or for both parents simultaneously if they work, as the family decides.

Premature children/newborn hospitalization

In cases of premature children with low weight or when hospitalisation longer than a week is needed after childbirth, maternity leave will be extended for as many days as needed, for a maximum of 13 weeks.

Paternity leave

This Law introduces this benefit, as a measure to promote gender equality and work life balance.

It consists of 13 days of paid leave for male employees (added to two day permission for childbirth), extended for two more days for each child from the second, in multiple childbirth. It also applies in cases of fostering or adoption for periods longer than a year. Working requirements are: 180 days contribution to the Social Security System in the previous 7 years, or 360 in his working life. It can be required in the period from childgiving/ fostering/adoption to the end of maternity leave, or immediately after it.

Parents could chose to distribute this leave, both full-time or part time (50% minimum). This law also contemplates a new economic benefit which will be similar to the maternity allowance.

Breastfeeding Licence

As stated in collective negotiation or company agreement, the breastfeeding licence could be substituted by a reduction in half hour of the working journey, or entire working journeys without any salary discount.

Working journey reduction due to family dependents

Employees who take care of a child under 8, or a physically/emotionally/ or sensory impaired person without any economic income, have the right to reduce their working journey from a minimum of 1/8 to a maximum of 50%, with the proportional salary reduction.

Leaves for childcare or family care

There are some options for employees who have to leave work during a determinate period of time for family reasons:

- Unpaid leave for a period of maximum three years, in cases of childcare.
- Unpaid leave from four months to five years
- Unpaid leave for a maximum of two years in case of family members including second-degree relatives, dependents by means of age, illness or disability and with any economic income.

This period can be distributed full or part-time.

Other paid licences

A two days licence in case of childbirth, accident/ serious illness/death/ hospital admission or surgical procedures without a recovering period in the hospital, of relatives including second grade of affinity.

A four days licence in cases gathered above, if they imply moving to other locations.

Recently the Spanish government has approved an unique economic allowance of 2.500 per child. This measure aims to promote the birth rate so it is only given in cases of biological children. Although families can apply for it from the 3rd of July 2007, the legal requirements are still in the process to be established and approved.

Economic Support for Education of the Child after Birth

Child Care Aid is differently supported in each country:

The average is 100 euros per month per child until the child is 3 years old in every country.

WORKING TAX CREDIT FAMILY TAX CREDIT IN NORTHERN IRELAND

Child Tax Credit is a means-tested allowance for parents and carers of children or young people who are still in full-time non advanced education or approved training until the child is 19. All families with children can claim Child Tax Credit if their income is no more than £58,175 (€84,354) a year (up to £66,350 [€96,207] if you have a child under one). The person receiving this payment does not have to be the child’s parent to be eligible, but must be the main person responsible for them.

The amount received depends on various things, including the annual income. The payment is made up of two elements:

- a family element paid to any family with at least one child and worth up to £545 (€790) (2006-2007 tax year)
- a child element paid for each child in the family and worth up to £1,765 (€2559) (2006-2007 tax year)

Eligible parents/guardians may get more if they care for a child under one or a disabled child.

The other tax credit available, if either partner is working, is called the Working Tax Credit, and this includes a childcare element to help families who are working and spending money on childcare.

Working Tax Credit is designed to help people on low incomes, working 16 or more hours a week, whether they are employed or self-employed and can include support for eligible childcare. Extra help is available for people working 30 or more hours per week, disabled people, or people aged 50 or over who are returning to work after a period on benefit.

Working Tax Credit elements	Maximum amount due for the 2006-2007 tax year
Basic element paid to everyone who is entitled to receive Working Tax Credit	£1,665 (€2,414)
Second adult element	£1,640 (€2,378)
Lone parent element	£1,640 (€2,378)
An element payable if you work (jointly if you have one or more children) 30 hours or more per week	£680 (€986)
Disability element	£2,225 (€3,226)
Severe disability element	£945 (€1,370)
An element payable if you're aged 50 or over and returning to work after a period on benefit	£1,140 (€1,653) (if you're working between 16 and 29 hours per week)
	£1,705 (€2,472) (if you're working over 30 hours or more a week)
A childcare element, where you can get back up to 80% of your costs for eligible childcare	£175 (€254) maximum eligible cost per week if you're paying for one child
	£300 (€435) maximum eligible cost per week if you're paying for two or more children

IN HUNGARY

Dependent's allowance (családi pótlék): monthly benefit. Entitled: parent, fosterer, guardian. This allowance is granted from the start of pregnancy until the child reaches the age of 18 years, or even later, if the child still receives secondary education.

Monthly amount:

- a) in case of a one-child family 11 000 HUF, (€44,75 Per month)
- b) in case of a lone parent nursing his child alone 12 000 HUF (€48,82 Per month)
- c) in case of a two-child family 12000 HUF after per child (€48,82 Per month)
- d) in case of a lone parent nursing two children 13000 HUF per each child (€52,88 Per month)
- e) in case of a three-child family or family with more child 14000 HUF per each child(€56,95 per month)
- f) in case of a lone parent nursing three or more children 15000 HUF per each child(€61,02 per month)
- g) in case of permanently ill, disabled, or fostered child the amount is between 18000 and 23000 HUF. (€73,22 – 93,56 Per month)

Besides this, all families with three or more children have the subjective right to receive a financial aid to support their children's education:

Child-education benefit (gyermeknevelési támogatás) in Hungary:

Entitled are: the natural or adoptive parent, the spouse of parent, or the guardian who raises at least three children. This benefit can be received by one of the parents living together with the children while the youngest child is between 3 and 8 years old. The beneficiary can not undertake more than a half-time job (4 hours daily), unless he works at home. The minimum monthly amount payable is equivalent to an old-age pension (currently 25800 HUF) (€104,95).

The fee cannot be demanded, if the child is placed in day care institution or the beneficiary receives other statutory benefit.

SPAIN

Across all the stages of the Spanish Public Administration there are different forms of economic support for child-education:

The Education Ministry launches yearly economic aid for purchasing educational materials and textbooks, for families with children attending compulsory educational levels or University degrees in educational state centres or those with public economic support. The basic requirement for access to these grants is having an annual income within the economic limits stated for this year.

City councils offer a limited range of measures orientated to cover part of the family expenses related to education as: economic aids for meals and educational materials in state schools, etc.

Families with 3 or more children not only have financial support across all the educational levels, but also in public transport (bus, train, ferry, etc), cultural and leisure activities etc.

ITALY

In Italy there is support for parents who receive a low income, for children at schools or Universities.

There are the so-called "family allowances", which depend on the income and on the composition of the family: they are a part of the pay-package.

Another support for families or person with children is the fiscal deduction due to dependants' sons and daughters, until they arrive to the majority, or also after if they continue studying at University: this is a reduction applied to the taxes to be payed.

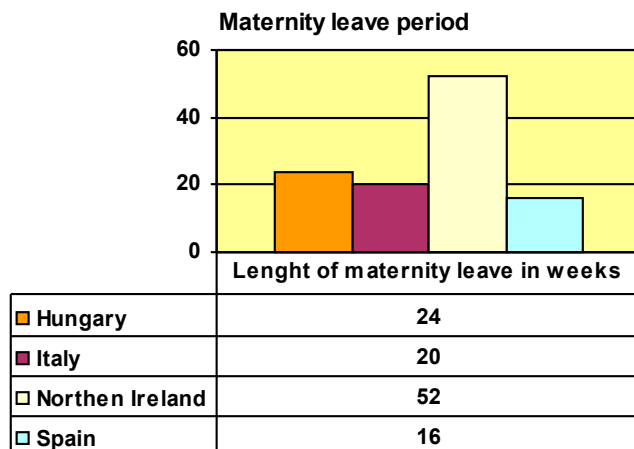
CONCLUSIONS

It is difficult to compare legislation in each country. Legal, judicial systems are different according to economic and social situation.

The objectives in Northern Ireland are focussed more on men in the care sector labour market, and on women in management positions. The objectives in Hungary are directed towards the reintegration of women in the labour market. Work life balance and equality among women and men are the main goals in the Spanish legislation, and in Italy these policies are family focussed.

Bearing in mind the grounds stated by the Community law, differences in national legislation related to maternity benefits have been found in this comparative study.

In relation to the allowed time off in maternity leaves, the average value among the countries participating in this study is 21.5 weeks. This central value shows that though, all of them are over the minimum indicated in Community law, which is 14 weeks, differences between countries are dramatical: Spain is definitively the country with the shortest period of maternity leave which last 16 weeks. The other case under the average maternity leave period is Italy with 20 weeks. Northern Ireland has the longest one getting up to 52 weeks, and Hungary gets up to 24 weeks.



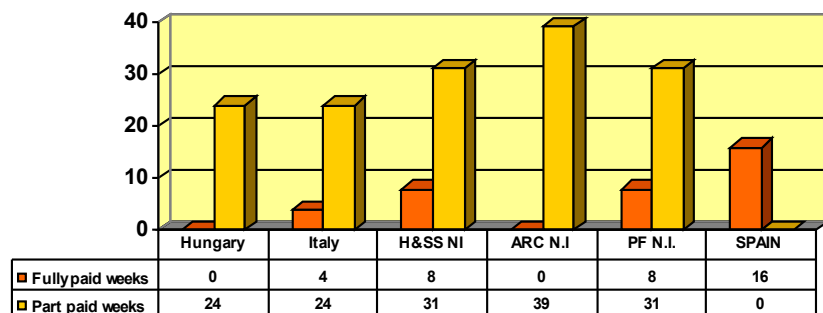
In order to have a more accurate perspective of maternity benefits, we have to consider other variables interacting with those over the length of the maternity leave period. One of the most important factors is the maternity allowance, and more precisely its length and amount.

Community law only highlights the obligation of the existence of a maternity allowance. It only establishes the minimum conditions for the maternity pay which are:

The amount of maternity pay must be at least equal to the value of sick pay in each country, depending on the national legislation for each country to fix the exact amount of this allowance.

- Women on maternity leave do not necessarily receive full pay, although they must receive any pay rise awarded before or during maternity leave.
- Maximum length of previous employment which is required is 12 months.
- Community law grants these rights in case employees fulfil the eligibility conditions for such benefits

Maternity pays: length and percentage of salary received



For this question, values vary significantly across the countries studied:

The figures above relates to weeks of maternity pay and percentage of salary received. They refer to general data, but let's focus on more accurate values:

HUNGARY

In Hungary, during the 24 weeks, mothers receive 70% of their former salary, but after this period, they are entitled to receive other economic allowances both periodical and/or punctual if some compulsory requirements are fulfilled. In Hungary you can stay at home for 36 months.

ITALY

In Italy, during the first month, mothers or fathers receive full leave salary. After this period, they could have a further five months, but they will receive 30% of their salary.

NORTHERN IRELAND

Northern Ireland partners have 3 different situations:

Health and Social Services

The first eight weeks of absence, the employee will receive full pay, less any Statutory Maternity Pay or Maternity Allowance (including any dependents' allowances) receivable.

For the next 18 weeks, the employee will receive half of full pay plus any Statutory Maternity Pay or Maternity Allowance (including any dependents' allowances) receivable, providing the total receivable does not exceed full pay.

For the next 13 weeks, the employee receives Statutory Maternity Pay and the remaining 13 weeks is unpaid.

ARC

Eligible employees are entitled to: 90% of their average weekly earnings for the first six weeks, with the last 20 weeks at statutory maternity pay.

Positive Futures

Eligible employees are entitled to: Full pay during the first eight weeks of absence, including Statutory Maternity Pay or Maternity Allowance (including any dependents allowances)

For the next 10 weeks, the employee will receive 50% of their full pay plus any Statutory Maternity Pay

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For the remaining 21 weeks, the employee only receives Statutory Maternity Pay.

All pregnant employees, regardless of their length of service, are entitled to a week's pay (at their normal rate) on return to work after the baby is born.

SPAIN

Pregnant female employees are entitled to 16 weeks fully paid leave, that means 100% of their previous salary. This may be extended, in cases of multiple births, by 2 weeks per child from the third baby.

Male employees would receive a paternity allowance, similar in amount and conditions, as stated in Law 3/2007 22 of March.

	Maternity leave	Pay	Maternity allowance
Northern Ireland	26 weeks statutory, 26 optional weeks	90% for first six weeks, SMP for the next 33 weeks and 13 weeks unpaid	From the 9 th to the 39 th week, Statutory Maternity Pay is £112.75 (€163.49)
Hungary	24 weeks	Full pay the 5 first weeks, then to 89 to 30% of the salary the next weeks	70% of the salary during the 2 first years when the parents stay at home to nurse the child
Italy	20 weeks	Full pay for the first month, then 30% of the salary for maximum other 5 months	"Family allowance", depending on the income and on the composition of the family. Fiscal deduction for dependants sons and daughters.
Spain	16 weeks (6 obligatory and 10 optional)	Full pay	Fiscal deduction of 100 € per month during 3 years if working and economical requirements are fulfilled.

Above, a short comparison between different European countries

Economic support for education of the child after birth:

In Northern Ireland, two financial help exist: Child Tax Credit, granted for the main person responsible of a child/young people, while they are still in full time formal education or training until they reach 19, if economical requirements are fulfilled. We can find also the



Working Tax Credit, designed as a childcare element to help working families receiving low incomes and spending money on children education and care .

In Hungary, financial aid to support children's education is granted to families with three or more children; in cases were the direct beneficiary works for a maximum of four hours daily. There also exists another monthly allowance which is granted from the start of pregnancy until the child reaches 18 years, if he/she is still at secondary education levels.

In Italy there is economic support for families receiving low income with children at schools and Universities. Indirect support for families is granted by fiscal deductions by dependants until they reach their majority or even further in case they continue studying at University.

In Spain families who fulfil the established criteria, have a wide range of economic aids offered by different levels of the Spanish Public Administration Bodies. Moreover, families with three or more children have granted economic support not only across all the educational levels but also in public transport, cultural and leisure activities and so on.

Although child care aid is differently supported in each country, we can find certain similarities among them:

Across all the countries involved in this study, economic support is granted to families with low income, even though in three countries out of four, this aid requires that children/young people are involved in formal educational processes.

Also, we can found child care aid for families with three children or more in Hungary and Spain.

We would like to highlight some particularities found in this study, as example of the diversity among the countries which can give us new ideas:

Northern Ireland offers extra economic support for education of children taking into account elements as: age, return to work after a benefit period, amount of working hours per week, etc.

In Hungary grandparents are entitled to a child care aid after the first year of the child, and reduction of the working journey by cause of breastfeeding is also available to mothers who choose bottle-feeding or even for adoptive mothers.

In Spain legislation approved this year has introduced paternity leave and it has also contemplated a new economic benefit which will be similar to the maternity allowance. In Italy, working leaves due to medically certified illness of children up to three years old, have a limitless duration, and can be distributed alternatively between both parents if they work.

As a conclusion we can say that there is still a broad field to explore, and best practices and experiences to share among our countries, to promote work life balance all over the world.

Chapter Three

Comparison of Training Methods and Programmes to Improve Opportunities for Men and Women

by Massimiliano D’Innocenzo, György Váradi, Miriam Somerville, Viktória Tollas, Siobhan Bogues, Cristina Górriz, and Ilaria Baroni

INTRODUCTION

All the four partners in the TCA “Balance Partnership” organized, at national level, different kinds of training courses, with the main purpose of increasing equal opportunities. Each of them had a different idea about **how** to do it.

WG3 worked out a complete database of all the training each partner developed and a more detailed and comprehensive comparison of one of these activities for each partner:

- | | |
|--------------------------|-----------------------------------|
| ▸ POISE project | → Progression Programme for Women |
| ▸ CONCILIA project | → Course of E. O. Agents |
| ▸ INSPIRAL project | → Assistant public administrative |
| ▸ Universo Donna project | → Social Promoter |

THE DATA

In the following database, detailed information regarding them has been collected in a systematic way.

Project	UNIVERSO DONNA	INSPIRAL	CONCILLA	POISE
Country	ITALY	HUNGARY	SPAIN	NORTHERN IRELAND
Training objectives	<p>To train an high professional figure, called “Social Promoter” able to:</p> <ul style="list-style-type: none"> - support social enterprises and non-profit organization management; - offer a joint, organic and specialized training; - encourage the creation of a new generation of social enterprises - increase the sense of social commitment in the choices of third sector operators - encourage the constant and progressive growth of private-social turnover; - encourage the employment in this sector. 	<p>To train an “Assistant Public Administrative”, through:</p> <ul style="list-style-type: none"> - progression programme for woman; - vocational training; - psychosocial preparation; <p>In order to:</p> <ul style="list-style-type: none"> - fill the gender gap; - defeat the job segregation. 	<p>The name of the course is On line course the Equal Opportunity among Women and Men Correspondibility Key for Reconciliation.</p> <ul style="list-style-type: none"> - To prepare the Agent of Equal Opportunities, among Women and Men Co-Responsibility Key for Reconciliation, on line course; - to prepare technicians/expert in economical promotion of the territory; - to promote and encourage the equal opportunities; - to satisfy the specific requirements in the training of the the Agent of Equal Opportunities, among Women and Men Co-Responsibility Key for Reconciliation, on line course; - order to introduce changes both in people life and in the different public and political fields of power; - to promote changes into social attitudes; to develop a equality mentality in the opportunities between men and women, to reduce the risk of gender discrimination due to the labour market demand; - to guarantee balance between life and work. 	<p>To prepare women for applying for a management role within learning disability services through a progression programme.</p> <p>Often women are put off applying for supervisory and management positions because they are afraid that they will not have the skills, knowledge and confidence to carry out this role.</p> <p>The programme aims to encourage women to progress to become managers through a structured learning programme that will enhance their understanding of learning disability services and provide opportunities for personal and professional development.</p>
Duration	The training course has a length of 330 hours	The training course has a length of 1310 hours	The training course is organized on line for 150 hours	The training course has a length of 240 hours

Methodology	<p>186 hours theory lessons 54 hours practice 90 hours e-learning</p> <p>The e-learning practices will be studied previously by the teaching staff of each module. This practices will follow the logical course outlined during the lessons.</p>	<p>522 hours theory lessons 788 hours practice</p> <p>Computer is used during the training as work-tool, <i>even if the training is not based on it. DACUM</i></p> <p>The modules are closed units, their contents pertaining to the course’s objective. Each module is part of the wider training programme (in this case Assistant Public Administrative), <i>and in the same time</i> is an independent unit for assessment, which can be considered in other training programmes. The modules are also the starting point for the attendance of others training courses.</p>	<p>150 hours e-learning.</p> <p>The course is organized on line. Students and teachers will have access to training materials and communication tools, thanks to the technological platform (http://formacion.campuriaconcilia.com/).</p> <p>Students should enrol themselves in advance in order to receive a key word and a countersign.</p>	<p>24 hours taught per month 16 hours per month study time</p>
Target Groups	<p>15 participants + 2 auditors</p> <p>Requirements:</p> <ul style="list-style-type: none"> - high school degree/university degree - state of unemployment domiciled in the Region of Abruzzo - basic computer competences 	<p>The course is for unemployed (especially women) who:</p> <ul style="list-style-type: none"> - are undereducated - have out-of-date/non-marketable training - are gypsy - have altered working ability - are more than 45 - are dropped out of school. 	<p>The course is addressed to:</p> <ul style="list-style-type: none"> -internal staff (Project Staff and Local Development Agents from Public Administrations) - external staff (ADEL - specialists in economic promotion and employment). 	<p>2 programmes with 12 women on each.</p> <p>Requirements: Females must already be employed in learning disability services and wish to progress to managerial/ supervisory roles</p>
Selection	<ul style="list-style-type: none"> - Write test on general culture and subjects of teaching - Oral test: motivational interview 	<p>Pre-session about:</p> <p>Job orientation, skills conflict management skills, stress tolerance, professional skills assessment.</p> <p>Selections:</p> <p>Apptitude tests.</p>	<p>All applicants have been selected they were all eligible.</p>	<p>Short listing was done by written application and then final selection made by interview.</p>

<p>Content</p>	<p>The content of the course consist of 5 modules:</p> <ul style="list-style-type: none"> - communication and human resources - political-legislative - economic - organizational - project module 	<ol style="list-style-type: none"> 1. Preparation for participating in the course (4 or 5 days of pre-session); 2. Theoretical and practical training (1310 hours- see below); 3. Psychosocial preparation; 4. Setting at work (7-8 months) 5. Follow-up (6 months) 	<p>The content of the course consist of 5 modules:</p> <ul style="list-style-type: none"> - Equal Opportunities definition. Gender approach analysis. The role of Equal Opportunities Agents. - Non sexist language use - Women, work and Employment: gender approach; - Work life balance and co-responsibility; women's situation in society. - Equal opportunities policies. Equal Opportunities principle, action methodologies evolution 	<p>The programme has five modules: Reflective Practice & Personal development Understanding learning disability services Safe practice and protection from harm Communication Person centred services</p>
<p>Structure of the Modules</p>	<p>Module Communication and Human Resources (20) Theory 11 hours Practice 9 hours Module political/legislative Theory 35 hours E-learning 15 hours Module economic (80)</p>	<p>Law basics (132) Theory 132 hours Administration (190) Theory 78 hours Practice 112 hours Typewriting (216) Theory 96 hours Practice 112 hours Management (208) Theory 96 hours Practice 120 hours Organisational Communication(72) Theory 24 hours Practice 48 hours Book-keeping (70) Theory 30 hours Practice 40 hours Informatics (136) Practice 136 hours</p>	<p>The structure of the modules is the following: Theory: PDF document that contributes to the theoretical bases in every module. It can be downloaded into personal computer. Scheme: graphic summary aiming to make clear the most important ideas. It can be downloaded into personal computer. Practical exercise: document of informative character that helps to put into practice the theory learned through entertaining exercises. It can be downloaded into personal computer.</p>	<p>Each student is required to attend 3 taught days and complete an assignment for each module.</p>

<p>Structure of the Modules</p>	<p>Theory 45 hours Practice 15 hours E-learning 20 hours Module organizational (80) Theory 55 hours Practice 5 hours E-learning 20 hours Project module (100) Theory 40 hours Practice 30 hours E-learning 30 hours</p>	<p>Business communications (46) Theory 6 hours Practice 40 hours Business foreign language(210) Theory 30 hours Practice 180 hours Economics (30) Theory 30 hours Other (non-vocational) modules and activities: Self knowledge training team Building integration in the work place Communication Conflict management Life planning Learning skills Job-searching techniques Labour law basics Labour-market skills Synthesis module Exam-routine training.</p>	<p>Test: test to evaluate the level of students apprenticeship (these exams are programmed in order to make their review tutor unnecessary). It is necessary to pass each tests to be able to tackle the following modules; the attempts number is unlimited but it is necessary to answer correctly to all questions to be able to pass them. Forum: interactive space of communication where every student can keep in touch with the rest of the students. Course glossary: tool that allows the search of diverse definitions related to the course subject. The volume of concepts of glossary will be growing as the course advances.</p>	<p>Learning continues in the workplace and in learners' own time, through the application and extension of learning. Students receive tutorial support to ensure individual learning needs are met. In addition to the taught days students will need to commit the equivalent of 2 days per month study time for assignment preparation and additional reading.</p>
<p>Certification</p>	<p>The participants that attend at least 70% of the whole training course will get an <i>Attendance Certificate</i></p>	<p>The participants take an exam in each module, and after the whole training they receive a <i>Certificate of Qualification</i> listed in the National Register of Accredited Qualification. This is an internationally accepted certification, which develops the opportunities of the student at the labour-market.</p>	<p><i>Attendance Certificate</i></p>	<p>Certificate accredited by City & Guilds a UK awarding body. The qualification is approved on the UK National Qualifications Framework.</p>

Evaluation			
	<p>At the end of each module, teachers will distribute to the participants a questionnaire of evaluation, to check the quality of the learning and the effectiveness of the developed activities. The questions will be structured according to a mixed criterion from questions with dichotomic choice (Yes/No: True/False), to multiple answer, to open answer, etc. Questionnaires and interviews will be used also to test the satisfaction of the participants.</p>	<p>The participants fill out an anonymous Satisfaction Form in each second month about the training, the teachers and themselves. The teachers assess in each second month the participants' development, behaviour, absence, etc. (Teacher's feedback form). We compare the two assessments with each other, and if it is necessary, we modify the training plan or change the teacher. At the moment we have accomplished the 75% of training. 1 participant has left the programme, because he found job.</p>	
		<p>The course evaluation that could be carried out is limited, as we are at the moment in the module 2 (from the 5 existing modules). A pre-evaluation of the course has been carried out by polls the day of presentation of the course. When the course finishes, we will realize a final evaluation (also using the method of polls). People recorded during the course: 55 women, 43 men. Students' group made up mainly by women, between 25 and 50 years, public servants and non-unfit for work. We must stress the attendance of 21% of men, little less than 30% percentage of men that work in other sectors. Working situation: As well as this point of view is concerned is possible to state that about 90% of students have an high level of education and that more of 30% have attended specialized courses.</p>	
		<p>Students are personally assessed, using the Rickler scale, at the beginning and at the end of the programme. Each unit is assessed by a short assignment, covering all learning outcomes and content of the unit, often with application to the learner's own situation. An opportunity for additional self-directed learning also exists, which can lead to 'merit' or 'distinction' grade. Individual tutors mark the assignments and give each student a grade of referral, pass, merit or distinction. Tutors will also be asked to complete an individual evaluation of each student. Evaluation forms are completed by students at the end of each unit to measure their satisfaction with the teaching, content and practical arrangements.</p>	

This database allowed us to focus on 4 themes of interest:

- Communication
- Training methods, especially e-learning
- Payment for students
- What difference did it make for women

1. Communication

Communication was one of the common elements in all the four activities analysed. Independently from the main content of training, all the DPs decided to stress communication, considered a vital part of management within any organisation and any kind of job. The Spanish course considered communication not as a single module, as it was the objective of all the training.

In the other 3 courses, communication was taught as a module and considered an important skill to develop. All the trainees had to be in contact with partner organisations, administration authorities, social departments and so on, and with clients and users. Communication is more important especially where they worked in learning disability services, in which many clients would have difficulty in communicating.

Communication modules tried to develop skills using a wide range of methods, from written reports to presentations in front of a video camera, from situational exercises to oral communicational training.



Students gave good feedback and good results: they learned to communicate in a better way, even if a lot depended on their starting situation. Most of them, in different training and different Countries, thought that more time should have been dedicated to communication, but this was to be expected, as we developed training activities designed for different purposes, and communication was only one among many aspects.



2. Training methods, especially e-learning

Training methods were quite different in each course. The Spanish example was the most innovative, being organized on-line, exclusively by e-learning, as the majority of their students were well prepared to study on-line. The Italian one was the most composite, with frontal lessons, practice and e-learning for each module.

In the Northern Irish experience, each module was taught by individual tutors in a classroom style setting over 3 days. The students must use information technology (IT) to source research and word processed versions of their assignments had to be emailed to the

programme co-ordinator. IT training has been offered to all students as it, generally, does not form part of their normal working activities.

Finally, the Hungarian training did not consider e-learning, but concentrated on theory and practice, for 3 reasons. Firstly, only a few families have internet connection and computers at home, especially those with low income, the beneficiaries of the INSPIRAL project. Secondly, those professions which need manual skills (e.g. carpenter, mason, mechanic, etc.) cannot be taught through e-learning and this definitely disadvantages the less educated students. Thirdly, there is no software available yet, which could help the students to prepare for the exams.

3. Payment for students

Only one of the training activities provided payment for student, and this did not depend on whether or not the pupils are unemployed. Payment for students could be a good incentive to follow a training course, but should not be the only one.

Of course, our starting points were really different. In Hungary, where the beneficiaries were all unemployed without any other income, and where social benefits are really poor, without a subsidies, they could not have taken part in the training. So the situation is really different from Northern Ireland, where employers provided students with paid time off to attend the taught days and the costs for lunch, refreshments and course materials were paid by the POISE project.

The problem with payment was always that some of our beneficiaries could be motivated only by the money to take part in the programme, but where this was tried it did

not cause problems. However, it should be remarked that the Italian DP, after an unsatisfactory experience in the first Equal round, decided to avoid payment for students in this second one.

4. What difference did it make for women

One of the goals in Equal projects is to change the minds, of politicians and administrators, and beneficiaries. What could change minds better than a good experience in a project developed to help people, to improve our society and to provide more opportunities for those who have been disadvantaged in the workplace and in life in general?

And what could measure better this feeling than their words?

Here is of our big results:

An experience form POISE project: "I feel that the first steps programme has benefitted me greatly by developing and increasing my knowledge in the more managerial side of Learning Disability Services. It has improved my practice by focusing my attention on the way forward for such services and has given me an understanding of the importance in moving forward positively, e.g being proactive in ensuring a person centred approach. I also feel that I would now be better equipped to procede further in my career within the Learning Disability Services as a direct result of the knowledge and self- confidence I gained from taking part in the HPD course."

One of the students in Italy is Vera. She was already a member of the Coop. Help Donna, created in the first Equal project (named exactly "Help Donna") and now she followed with success the training for "Social Promoter". We asked her why. "Because I wish to give to me



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and my colleague the opportunity to develop our daily centre for elderly and disabled people also after Equal. We would like to organize a full range of services in our little villages to help people with problems and their families, but also to help these little villages too, we want they could survive and be a good place where we could live all our life”.

One of the Spanish E.O. Agent: “Every single time I tell somebody that I am following an ‘online training course on equality of opportunities between men and women’ they ask me: why would you do such a course since you are a graphic designer???”

...all the information I have received has helped me a lot to make me think of the woman’s role in society all along the history. It has also helped me to understand better the current situation of women, to discover things I didn’t know and to reaffirm those I did... I would like to say that, at a personal level, the course and the project itself have made me think carefully about my nearest environment as family, friends, neighbours and of course about the society in general.”

Judit attended the “Public service assistant” course, organized by the Hungarian project “Inspirál”. She said “I live in Püspökladány. I liked to attend the course, the teachers and the classmates were good. I learned many new things. For the time being, I work at the University of Debrecen as administrator. I am happy for having accomplished the course, because I have been unemployed until now. My colleagues help me and I delight in going to work.”

Appendices



Appendix 1

GLOSSARY OF COMMONLY USED TERMS

by Mariead Magill, Massimiliano D’Innocenzo,
Victoria Gómez, and Balázs Krémer

GENERAL

Beneficiary

A person who gains or benefits from Euro-
pean funded projects.

Dependents:

Refers to family members, such as children,
elderly or disabled, who rely on the employee/
beneficiary for care, who are unable to man-
age their basic daily needs without assistance.

Equal Opportunities

Ensures that measures are taken for indi-
viduals’ to have similar chances to compete
for access of resources to participate in all as-
pects of life. Promoting equality of opportu-
nity highlights the barriers to economic, cul-
tural, political and social participation on the
grounds of disability, gender, religious belief,
marital or family status, political opinion,
age, race/ethnic origin, sexual orientation,
trade union membership and criminal con-
victions.

Equality

The state in which people have similar op-
portunities in social status, income, wealth,
cultural and political participation. Equality
is the absence of inequality and disadvantage
experienced by individuals or groups of indi-
viduals within society.

Evaluation

The value oriented assessment of a particular
activity showing the aims, objectives, what it
has achieved, how this was carried out and
recommendations on the way forward.

Gender

Refers to an individual’s identity as male or
female and issues related to that status ex-
pressed in terms of masculinity and feminin-
ity. It is how people perceive themselves and
how they expect others to behave, towards
them and is largely culturally determined.

Innovative Practice

The introduction of a new and different way
of carrying out a practice / activity.

Job Desegregation

Policy and practice to counter the concentra-
tion of men and women in certain types and
levels of jobs. Horizontal segregation relates
to certain types of work or professions being
dominated by one sex. Vertical segregation
refers to women (usually) being unable to ac-
cess management and/or senior positions.

Learning Disability

Learning disability includes the presence of
a significantly reduced ability to understand
new or complex information or to learn new

skills (impaired intelligence), with a reduced ability to cope independently (impaired social functioning), which started before adulthood with a lasting effect on development.

Social Capital

Refers to the concept that social networks have value for those within them and those outside them. There is more powerful potential to access resources and influence decision made through increased civic participation.

Social Exclusion

Refers to both material deprivation (poverty) and the denial of rights and opportunities to participate fully in society. Social exclusion can be deliberate or indirect. A set of processes such as those found in the labour market and welfare system, that in effect results in individuals, households and social groups being constantly marginalised in society.

Social Inclusion

Supporting people despite any exclusive factor, such as gender or disability to have equal opportunities in all aspects of life.

Social Integration

Refers to when a disadvantaged person/group of people are included into society, regardless of their position in society, religious belief, political opinion, racial group, age, marital status, gender, disability (or lack of), sexual orientation or persons with (or without) dependents.

Work / Life Balance

Work-life balance is about the proportion and interaction between paid work and other activities, including unpaid work in families and the community, leisure, and personal development.

Work-life balance is about creating a produc-

tive work culture where the potential for tensions between work and other parts of people’s lives is minimised. This means having appropriate employment provisions in place, and organisational systems and supportive management underpinning them, for both male and female employees.

Work-life balance for any one person is having the ‘right’ combination of participation in paid work (defined by hours and working conditions), and other aspects of their lives. This combination will not remain fixed, but may change over time.

WORKING GROUP 1: COMPARISON OF SOFT INDICATORS

Distance Travelled

Refers to the amount of progress that a person has made or is still to make in relation to their knowledge / skills.

Professional Judgement

A judgement made by supporting professionals (trainers, tutors, social workers, etc.) on the progress of a beneficiary while attending an EQUAL training programme.

Rating Scale

Refers to an assessment or classification of somebody or something on a scale according to how much or how little of a quality/skill/knowledge that he/she possesses.

Rickter Scale

The Rickter Scale® provides you with an innovative non-paper based assessment and evaluation tool. Its effectiveness stems from the fact

that it provides a framework for engaging clients in motivational solutions-focused work.

Satisfaction Polls / Surveys

A way of establishing how happy a person is with the way that something has been arranged or done, i.e. how training has affected them or made their life better, the gains and new perspectives he/she has gained during the EQUAL project.

Soft Indicator

Refers to indicators that cannot be measured by traditional evaluation tools.

An example, would be an individual studying towards a qualification the hard outcome would be getting the qualification the soft outcomes would measure how surroundings, things happening in the individuals life affect the final grade of the qualification.

WORKING GROUP 2: COMPARISON OF LEGISLATION AND NATIONAL PRACTICE

Continuous Training

Training (including vocational training – see below) which takes place all the way through your employment.

Family Friendly Policies

Practices that take place within an organisation in order that their employees can take care of their children/dependents.

Flexible Working

A system of policies and procedures set by employers that allows employees to set their own daily times of starting and finishing

work, within specific limits in order to balance their home and work situations.

Kindergarten / Pre-school / Crèche

Refers to different types of facilitates which beneficiaries may use to look after their children while they attend work/training.

Lactancy Leave

Refers to a special leave provided by employers to women who require time off to breast-feed their new-born baby.

Maternity Leave

The leave that a mother is entitled to take immediately before / after the birth/adoption of their child/children.

Parental Leave

The leave that an organisation will allow an employee in order to look after the health and welfare of their children/dependents.

Paternity Leave

The leave a father is entitled to following the birth/adoption of their child/children.

Work Incentives

A way of encouraging employees to work more: the change to somebody’s rate of work, saving, or investment caused by the offer of enhanced pay, benefit, or compensation. It can also be a way of encouraging people to enter into the labour market.

WORKING GROUP 3: COMPARISON OF TRAINING PROGRAMMES

Accreditation

Refers to official recognition to a certain training organisation: to officially recognise a person as having met a standard or criterion.

Basic Skills

Refers to the most important or fundamental skills in order to function within society. Includes communication, literacy and numeric skills and the readiness to communicate via ICT tools, such as Internet or mobile phone.

Certification

An official document that gives proof and details of something such as personal status, educational achievements, attendance at training programme, ownership, or authenticity.

E-Learning / FAD

The acquisition of knowledge and skills using electronic technologies such as computer

and Internet-based courseware and local and wide area networks. Using these new tools, e-learning could be more focused on the student and could be a good alternative to the traditional training. It can be also used in mixed training courses, called blended learning.

ICT

Information and Computer Technology – The use of computers to obtain, store and present information.

Processing of data via computer: the use of technologies from computing, electronics, and telecommunications to process and distribute information in digital and other forms.

Vocational Training

Training which relates to job or career skills. Education designed to provide the necessary skills for a specific job or career.

Appendix 2

CONCEPT AND UTILITY OF “SOFT INDICATORS”

by Balázs Krémer and Zita Éva Nagy

THE CONCEPT OF “INDICATORS”

Indicators are special measures - usually natural outcomes of measurements or composed variables that are expressed by digital numbers, very similar to “variables” applied in sociology, economy or other social sciences.

The difference between the phenomena “variable” and “indicator” is mostly in purposes, why we use them. Variables are toolkits of sciences. In contrast to that, indicators are tools of “evidence based” management and policy making, private or public program or project management - providing measures of policy, program or project performances (at least, in the vocabulary of certain OECD countries (Organisation for Economic Co-operation and Development) and international bodies, like the European Union (EU) or the World Bank).

The general and overall purpose of developing indicators – is providing powerful tools for “real effect and real impact oriented” actions.

THREE MAJOR FORMS OF INDICATORS

Input indicators may express the amount and the quality of inputs (e.g. budgets and investments, staff and manpower, qualifications, conditions of activities in terms of space, equipments, etc.; the size and the composition of involved target-groups etc.). Input indicators could be analyzed basically from the viewpoints, of how adequate the amounts are, the qualities and compositions of inputs in the mirror of problems, or the objectives and targets of projects.

Input indicators are not the best founds for providing an evidence basis of judgments – but very often exclusively such indicators are utilized, since technically that kind of indicators are the simplest and easiest ones.

Output indicators may make sense regarding the quantity and quality of jobs that have been carried out. Output indicators are usually “performance indicators” of working organisations and staff – regardless of how wise, tricky, goal oriented or adequate the project design is. Regardless of some simple indicators (e.g. opening hours of a service), output indicators could be earned mostly from administrative data: reports, accounts, diaries, invoices and signed bills. As a consequence of that, output indicators cannot always be applied, if the

internal administrative and controlling system is not properly set up from the beginning of the given program.

Outcome indicators may express the achievements, results, impacts, and effects of the program. Outcomes are not value-oriented findings and it is hard to ensure the objectivity. To ensure the “independence of evaluation”, an organisation could employ independent experts who have no concrete interests in presenting different (usually: better) achievement as they are in reality.

Involving independent evaluators to create and compose outcome indicators is usually an expensive exercise (both, in terms of money and time). Mostly this is the reason why policies are likely to “forget”, or miss utilising outcome indicators – even if in principle they could express essential evidence for making judgments on any policy, project or program.

Possible Sources of Indicators

Principally there are two main sources of measures and variables that could be applied as indicators.

The first type of sources are surveys, polls, interviews, and other “research-like” activities which sample the participating or affected population, consumers, “stakeholders” of a given policy, programme or project. Independent experts and social scholars are heavily interested in “evaluation” or “follow-up” actions, since that sort of activity is the most advantageous and the most profitable business activity in contemporary academic life.

The use of survey data has certain advantages, but it also has limitations. In a survey relevant questions are asked which results in a free opportunity for applying any tricky, holistic or indirect concept that may show up correlations among circumstances and indicators. In addition, it is a great advantage that surveys can be standardised among different social or consumer groups across different countries. Most of the international comparative data sets are standardised surveys (e.g. Labour Force Survey, European Household Panel Survey, Statistics on Income and Living Condition, etc.), and same data sets are based on commonly used indicators, such as Laeken portfolio of indicators in the practice of OMC by EU.

Meanwhile, survey data are not really objective and “hard” data. From surveys anyone could earn objective facts on trends, tendencies, statistical correlations – but survey data necessarily have systematic deviations and mistakes, survey data are not “real” accounts. The composition of any sample is not identical with the profile of total population; a good selection of sample can minimise the statistical mistakes, but cannot avoid them. Weighting and other correcting procedures might improve the data-quality; but also, they cause other type of deviations. In addition, there are some epistemological problems from volunteer inquiry methodology. People are able to express their opinion, but the opinion is somewhat weak, fragmented on the surface of personality, composed partly from different facts and objective perceptions on facts; and partly from different social and psychological “pulls” and “pushes”.

These individual deviations create strange standards in survey data: you can put the same questions in some form to every interviewed person hoping they would understand the questions in the same way. You might be sure they will understand them but they may also have different motives and intentions for telling the truth, or modifying the truth into certain orientations.

That kind of uncertainty is unavoidable and the use of other types of evaluation that has an enhanced verification, checks and well documented data is always sought.

The second type of source is “administrative data sets”, meaning written records documented during the running of a business or carrying out a programme. The proto-type of these kinds of indicators is such business indicator, as e.g. “profit” – composed from natural data earned from invoices, bills, books and accounts of business administration. What we may observe in relation with these indicators at contemporary governance – is basically a kind of adaptation process: governments and international organisations started to learn from efficient private businesses and management. This learning and adaptation process includes not only the introduction of such competitive tools, as tendering or public purchasing, but also different business-like accounting systems and composed “indicators” expressing different characters of performance and achievements.

Administrative data sets are not separate components from the “mainstream policies” or “programmes”: the sources, data sets must be books, diaries registering major facts and circumstances by regular staff, possibly immediately after fact, and management must capably store these sets as management information systems.

As a consequence of that: administrative data-sets could be applied as source of indicators, if the data-administration is an integrated job of implementing staff from the beginning of the projects. Administrative sets are produced by the working staff (not by independent experts), but if the registration is a normal part of the jobs, and especially, if the “professional” accounts are strictly tied to “monetary accounts” – the data and indicators may be as valid and as relevant, as outcomes of book-keeping and accounting.

The above mentioned problems could be expressed from the negative side, as well. Unfortunately, the quality of indicators composed from different administrative data-sets cannot be better than the quality of accounting systems. Also, the quality of business accounts and audits cannot be better, than the quality of administration as a whole.

The quality of public policy indicators earned from administrative data-sets cannot be better than the quality of governments and public authorities.

WHAT ARE THE GOOD INDICATORS LIKE?

Summing up the above mentioned thoughts, we may collect the mean characteristics of good indicators. They must be processed from good quality (reliable, valid, exact) data and data sets. They must “hit the problems on the head”: they must be well focused, relevant, problem and achievement sensitive. They must be controllable, standardised, and consequently comparative, both in longitudinal and geographical sense.

Basically: they must prove “hard” and overall evidences about policies, programmes, projects as a whole, with special regards to the amount and quality of invested jobs and the achieved outcomes.

This is the dream about good indicators. Unfortunately, most of the time there is no possibility to cover the whole spectrum of relevant factors by enough hard, reliable and well-defined indicators.

The classical way of eradicating such conflicts was a short-minded, but safe method: selecting the elegant, hard, paradigmatic standard figures as indicators. The new trends are the opposite: we should rather focus to the essential outputs and outcomes, even if the appropriate set of our indicators are not fully hard, standard or “objective”. For implementing policies that are well focused into essential objectives and goals – we need management-toolkits including essential indicators on relevant, essential factors. Even if the indicators are not so hard, or, they are definitely “soft”.

The softness of an indicator is not a value; softening an indicator - it is not a goal. To have and to apply relevant and essential indicators, this is a goal, this is a real value – and for obtaining this value, it is a reasonable “price” to apply soft indicators, especially, if there is no room to choose harder indicator-options.

The standard “carrier” of developing indicators is – getting permanently harder. On the initial phase essential and especially relevant, policy sensitive indicators are usually hard – and from time to time they get harder. The classic example of such a development is the story of competence-development oriented education-strategies. At the beginning the policy was unclear and negative: not the amount of lexical knowledge in the crucial, essential criteria of good education, but rather some kind of readiness, some basic competence in learning, being curious about the world, being ready to understand language and thoughts of others. In a later phase different “local” tests and judgments tried to measure competences, and learning attitudes. For the time being, OECD have introduced internationally standard measures and special indicators for giving evidence on pupils’ learning competences – and EU introduced these PISA indicators as a part of Laeken indicators, expressing national illiteracy measures as a special factor of social exclusion.

Other typical uses of soft indicators is comparing them with hard ones, e.g. “distance travelled”, or other soft indicators could be applied as explanatory factors of such hard indicators, as job entries, graduation or other successfully finished schools or trainings.

WHAT ARE “SOFT” IN SOFT INDICATORS?

There are two main reasons, why certain indicators might be “soft”:

The first case is, if the basic data is “soft”. “Hard data” are hard, because of they are “objective”: they can be validated by other data; they are approved or confirmed by different, preferably independent from each resource. “Soft” basic data are individual or subjective measures that cannot be confirmed and tested in some way, as hard ones, including opinion and satisfaction polls, experts estimates, judgments and categorisations of highly qualified experts, such as medical doctors, therapists, consultants, etc.

The second case is, if the variable-composition is soft, even on the basis of hard data. Such softening process is, if we try to “rank” facts and events measured in different dimensions and quality; or, if we try to compose synthetic, multiplicity variables from hard data, e.g. usually we may measure different “deprivation factors” by hard data (lack of different goods, knowledge, capabilities, etc.), but the synthetic indicators of multiplied deprivations (e.g. how many items of deprivation factors could be observed in case of different individuals) – they become “soft”.

POSSIBLE SOFT INDICATORS IN RELATION WITH EQUAL PROJECT

The indicators listed below aim to provide evidence, basically on local project achievements. Meanwhile, for earning project-level indicators we must collect and aggregate individual-level indicators. In other words, individual participants are the basic “units” of observations, and the gathered, collected, aggregated basic data may produce evidences, indicators on project level. (We do not want to deny the importance of other type of data, e.g. if members of staff are “observation units” – but that sort of exercise is out of our current business.)

Our way is going to be the following: at the beginning we try to indicate the principal types of project-level soft indicators. In the second step we indicate some specific tools for earning individual level data from which data it is possible to aggregate project level indicators.

Finally, we assume certain simple methods to earn project-level indicators from individual data.

POSSIBLE TYPES OF PROJECT-INDICATORS

Satisfaction and opinion polls

Technically it is easiest to ask stakeholders (users and staff-members) about their hopes and wishes and the beginnings; and about their satisfaction at the final stage of the project.

The creation of such indicators is easy (standard inquiry), but the earned data is not only soft, but also weak: people might rate themselves very well during the projects without any positive outcome. Such programmes may be sometimes like sport-trainings or university courses in mathematics: not too much fun, rather necessary inconveniences, tortures and obstacles in favour of getting ready to be successful...

Distance Travelled

That used to be the gearing concept of British Public Employment Service – before the Job Centre Plus reforms. The main idea of “distance travelled” concept is that at the beginning of the programme the different participants are at different distance from the final target, to enter a job in the open labour market. This leads to think about possible successes of the project, than simplifying the question, who has a job at the end, and who has no job at the end of the project. If somebody was far-far away from being ready to fill a job-position at the beginnings, and he/she is almost employable at the end – this is bigger achievement than somebody else, who had almost a job at the beginning, and for the end of the project he/she did fill the position. Also it was an intention to avoid “creaming effects”. If the only indicator of the project is the number of job-entries, in that case the interest of managers is being very exclusive. Namely, they are heavily interested in selecting the better situated representative of target-groups, and not deal at all with people in harder situations. If the distances travelled are measured during the project – this creates incentives to involve people with deeper hardships, as well.

For implementing the concept, we should imagine e.g. a ten stairs ladder, if the tenth grade is to enter to the open job market, we may decide, what are the stages of road toward employment, and what are the equivalent distances, the “units” of distance travelled. If we are successful to do so, we might observe each participant where they are on this ladder at the beginning, and where they are at the end – and on an individual, or a community basis the “distance travelled during the project” will be a key indicator.

For making sense about the concept, as an illustration of “employability ladders stairs”:

1. Total depression, disordered and “given-up on self” situation (visible dirt, health problems, including dental and skin problems, lack of motivation and any kind of wills, etc.)
2. Disturbed self-perception, no identification of problems and goals, hazy dreams, hopes and wishes about the future
3. Strong efforts to keep order within the household and ego, but fully introverted orientation, no external relations, no connections

4. Some weak attempts to “open the doors”, to manage relations, and to fulfil certain norms and standards that creates capability for being in touch with others,
5. Projected and subordinated self-perceptions and servant functions that “work”, e.g. via spouse or children,
6. Limited capability and reliability to do something efficiently, but under the permanent control of somebody else (trainer, therapist, etc.)
7. Being intellectually ready to plan complex and feasible progress ahead: e.g. obtaining a diploma, dressing and out-looking properly, utilising child-care during the courses, planning how to spend benefits during the process, etc.
8. Being mentally ready and willing to run through a development process, being ready to control efforts, time, being reliable in time and in providing “pieces of jobs” in a framework of coordination,
9. Finishing some training/course successfully and/or obtaining work experience with positive outcomes in short-term, occasional or supported forms of employment – that are not “real forms” of employment
10. Entering the labour market

That “ladder” must be conceptually cleaned and improved for using it – the goal was rather making sense about such “ladder”, and not to provide a ready made indicator.

The distance travelled concept is really relevant to cope with hard employment problems, but it has three major difficulties.

First, it is really hard to standardise ladder and stairs, especially if the variety of problems and situations are in a wide spectrum among the representative of target-group. It is really hard to standardise distances if there are people from rural and urban settlements; if there are more or less healthy and chronically ill and disabled consumers; if there are representatives of different cohorts, life-cycle and partnership situations, etc.

Secondly, the distance travelled concept assumes to have some common visions about road-maps and pathways: distances cannot be measured without knowing which direction we want to approach the final goals. How far we suppose to be the first to “keep order” in egos and at homes, how far we suppose second (or first, or third) to be open for co-operations, for managing networks; how far we suppose to be third (second, or fourth) to improve such community-skills, as time-consciousness, reliability, direct speech and plain talk, etc.

Thirdly, the distance travelled concept might totally “hijack”, taking the project away from the original goals. More often: instead of bearing in mind job-entering as key task, some other components (e.g. therapies, trainings, mental-hygiene, etc.) get more dominant. That was the reason for dropping the concept at British PES.

Equal opportunities – A Manual of Best Practices

Weighted scoring of job entries

Many European PESs, including the British Job Centre Plus utilise that kind of indicators for measuring and testing the efficiency of regional and local labour offices, in some cases these indicators are the basics of certain financial components, such as extra premiums of managers.

This is a special scoring system, where job-entries are the keys, but “overhead bonus” points could be accounted, if people with special hardships could be helped to enter into job-positions. E.g. such bonuses are calculated, if:

- People are living with disabilities,
- Lone-parents with one / two/ three or more children,
- Adults having no primary/secondary school education,
- People having no jobs during the past 2/5/10 years,
- Immigrants, representatives of ethnic minorities and/or having language difficulties and/or communication barriers,
- Rural people having transport barriers

could be helped to get a job.

Of course, the weights and scores, or, at least the factors of special weights and scores must be bargained and negotiated before the project.

Scores of external factors

If the job-entries seem to have over-ambitious goals, having not too high chances – some external achievements could also be taken into account as soft indicators, expressing partial successes. That kind of external, not directly job-related indicators could be utilised, especially, if there are evident progresses during the project:

- Mental and/or physical health improvement,
- Being ready to keep order within the household, including balanced budgeting, clean body, rooms, clothes, etc.
- Children are going to school regularly, no failures at exams, no drop-out; parent(s) are co-operating with school and teachers,
- Children do enjoy learning, sport and/or community successes (e. G. Are invited to birthday-parties or sometimes to sleep in houses of class-mates)
- Participation in civic and/or volunteer activities,
- Extending networks, informal community-life,
- Readiness to participate in non-formal, informal or gray economy, being ready to make some occasional money (???), etc.

The risk of using such external indicators is the same indicated above: they should not take out the projects from the original orbit, by replacing employment with other objectives...

