

PERSPECTIVES AND EXCLUSIVES FOR COMPETENCE DEVELOPMENT AND LIFELONG LEARNING OF STAKEHOLDERS IN AND AROUND LABOUR ORGANISATIONS

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1. Abstract

In international reports and in Flemish reports education and training for competence development are advanced as key instruments to strengthen the economy's competitiveness and innovativeness, to increase the efficacy and the employability of workers. Converting this prevailing conviction or rhetoric into effective participation is not always easy. For example the participation rates in Flanders are not as high as those in the European reference countries and as set out in EU guidelines. One of the explanations for this sub-standard result may be found in the motivation problem, respectively the lack of sufficiently strong support among workers and employers for educational and training efforts.

In this study we researched the specific reasons that come into play to participate as an employee in education and training and to encourage employees to participate in education and training as an employer. We chose to use the term 'education and training perspectives', which is more far-reaching than 'motivation' and which also encompasses attitudes and opinions as regards learning and development, as well as the expected benefits. Next to this the reasons for not taking part in education and training were explored, defined here as education and training exclusives. These motives, attitudes, opinions and estimated costs all play a role when one chooses to tackle problems, change and challenges in the labour situation in a different manner than through participation in education and training.

After an extensive literature review and two exploratory studies among employees and employers a large-scale survey was conducted among a population of 592 employees and 459 employers based on an online questionnaire, which comprised 50 perspectives and 50 exclusives. The data were processed using factor analyses and have led to the identification of comparable groups of specific reasons which determine whether or not an employee participates in education and training initiatives and whether or not an employer encourages them. The results also indicated the importance that employees and employers attached to these reasons. Based on ten case studies with mixed groups of employers and employees the opportunities and constraints of a reflection and a discussion between the two parties were tested. Based on the study a discussion guideline was then developed which can stimulate reflection on the reasons for participation or lack of participation and which can help promote discussions between employee(s) and employer(s) on education and training and generate support.

Key words:

Motivation; competence development; education and training; learning

2. Study objectives

The importance of education and training and competence development as key instruments for increasing efficacy, the continuous employability of employees, the consolidation of the knowledge economy and the performance of labour organisations, support for innovation processes, etc. is widely recognised. But in spite of all the policy declarations by the authorities and by social partners the actual rate of participation in education and training initiatives in Flanders continues to be well below the targets that have been set. The Lisbon Objectives, for example, proposed a participation rate of 12.5% as a target for 2010 and 15% by 2020, while in Flanders participation in recent years varied between 6 to 9% participation of the working age population. Several factors can be invoked to explain this figure. In this study we have chosen to highlight two of them. First and foremost the motivation problem: what incites employees to really participate and what incites employers and managers to encourage their employees and to let them take part in such initiatives? And secondly the issue of support among the stakeholders: what do they have in common and on which reasons or motivations do they agree? And on which reasons or motives do they disagree?

The aim was to map the reasons for (non-)participation which really matter by means of an empirical study based on a literature review and the development of new motivation and obstacle items. In addition the aim was also to test opportunities for a reflection and a dialogue on perspectives and exclusives.

Clarification of key concepts

Studies about the motives for participation in permanent education and training have been carried out for many years. The literature review as well as the preliminary exploratory research have resulted in the exchange of the commonly used concept of 'motives' for the concept of 'perspectives'. The specific reasons indicated by employees and employers, after all, are more encompassing than the person-related psychological category of 'motivation'. The definition used in this study is: an education and training perspective is a – rather implicit or rather explicit - set of values, opinions, motives and standards relating to education and training in a person or group, which determines his/her/its involvement in and actual or potential participation in education and training in the labour organisation.

While literature and questionnaires on motives for participating or investing in education and training are not lacking, there is less information available about the reasons for not doing this. The study describes an education and training exclusive as analogous to the definition of the concept of an education and training perspective, i.e.,: a – rather implicit or rather explicit – set of values, opinions, motives and standards, in a person or group, to choose other strategies and resources than education and training for solving labour-related issues.

3. Methods and data

Based on a literature review and prepared by two preliminary studies (Baert, Clauwaert & Wybo, 2006 and Baert & Philipsen, 2008), the motivation and support problem was studied in the frame of a broader, empirical study. The study focused on the perspectives and exclusives which were identified in the literature review. These were submitted to 449 employers, managers and key agents in education and training on the one hand and to 585 employees on the other hand in an online questionnaire. Based on the data collected it was possible to apply a factor analysis and to distinguish a number of perspective and exclusive clusters. The second part of the study focused on the negotiation about education and training perspectives and exclusives between employees and their representatives on the one hand and employers, managers and key agents (in education and training on the other hand. Based on a qualitative case study (10 cases) a number of contextual elements and conditions were identified which play a role in the discussion between employee(s) and employer(s) about whether or not they participate or invest in competence development and education and training. Based on these elements a discussion guideline was developed.

Methodological explanation

Based on the literature review and the exploratory research the researchers drew up two lists of specific perspectives and exclusives. These lists were submitted for validation to nine experts in the field of human resource development and education and training and were subsequently amended. The result was a list of 50 perspectives and 50 exclusives for employers/managers and employees respectively with statements about their employees. Both lists happen to be equal in number. Some examples:

- 'I did take part in education and training in order to reflect on what my job means to me and where I hope it will take me in the future.' (an employee's perspective);
- 'I did not take part in education and training because I had been insufficiently informed about what would happen.' (an employee's exclusive);
- 'I did encourage employees to take part in education and training so that they would find out more about the processes, the objectives, the customers, etc. of our organisation.' (an employer's/manager's perspective);
- 'I did not encourage employees to take part in education and training because I knew they did not accept the ideas and objectives of the learning activity.' (an employer's/manager's exclusive);

4. Findings

4.1 Perspectives and exclusives

Because the lists of perspectives and exclusives are far too long to be presented in full here we give a reduced idea of these lists using clusters of related statements, which were established through factor analyses. The factors were named in such a way that they cover the content of the statements that have been statistically clustered in the best possible manner. The factors have been ranked in descending order of importance as expressed by the average score. The study among a non-representative, yet sufficiently large and diverse sample and a factor analysis of the answers thus led to the following result (see table 1):

Table 1: Perspectives per group of respondents

Factors among employees	Average Score *	Factors among employers/managers and key agents in education and training	Average Score *
Personal development and learning motivation	3.19	Job satisfaction	3.25
Professional identity and ability	3.09	Professional competence	3.21
Learning networking	3.08	Learning network	3.20
Labour performance for the organisation's benefit	2.80	Continuous performance	3.18
Continuous employability	2.41	Learning capacity	3.17
Professional networking	1.82	Productivity	2.82
Retain and consolidate employee position	1.68	Broad employability	2.01
		Organisational obligations	1.96
		Guarantees for job performance	1.96
		Ties to the organisation	1.91
		Career development	1.90

* The scoring options were not important (1), less important (2), important (3) and very important (4).

Although the factors are not completely identical – in terms of the clusters of summary statements and in terms of (naturally) the factor name – there is a certain convergence between employees and employers. At the same time it becomes apparent that employers and key agents obtain scores that are higher on average and also cover four more factors. This suggests that they attach even more importance to labour-related learning and competence development than employees do.

In terms of the exclusives table 2 gives an idea of the results; it is worth noting in this respect that there are more striking differences between the two groups than was the case for the perspectives.

Table 2: Exclusives per group of respondents

Factors among employees	Average Score *	Factors among employers/managers and key agents in education and training	Average Score *
Time conflicts	2.32	Inadequacy of the education and training offer	2.04
Financial obstacles	1.85	Time conflicts	1.96
(Perceived) irrelevance of the learning activity	1.85	Obstacles for access	1.72
Lack of social support	1.34	Person-related mismatches of the education and training offer	1.72
Obstacles for access	1.23	Personal irrelevance	1.43
No career development opportunities for one's career	1.03	Irrelevant for one's job	1.33
Personal negative feelings	0.33	Learning anxiety	0.88
		Lack of social support	0.88

* The score possibilities were not important (1), less important (2), important (3) and very important (4).

Without going into too much detail it is interesting to compare employees and employers at factor level as well as at item level. To this end we have selected a number of tables from the report in which the education and training perspectives and exclusives of employees on the one hand and of employers, managers and key agents in education and training on the other hand are grouped per weight class. In those cases where there is congruence between the stakeholders concerned the perspectives appear in italics.

As far as the 'very important' category is concerned two perspectives are indicated by employees compared with five perspectives by the other party. One perspective is identical for both parties, i.e., 'increase and widen knowledge'. Next to this, employees find the fact that they like to learn something and are curious a very important motive for taking part in education and training. Employers find that this is an important motive, but not one of the very important reasons for participation. In addition to 'increasing and widening knowledge' employers also find the following perspectives very important: 'quality care', 'acquainting yourself with innovative ideas with and through others', 'talent development', and 'effective team work'. Employees find these perspectives 'important' but not 'very important'. The table below gives an overview of these perspectives as well as of the perspectives in the 'not important' category.

Table 3: Perspectives per group of respondents for the 'very important' and 'not important' category

Education and training perspectives of employees	Education and training perspectives of employers, managers and key agents in education and training
'Very important' category	
<i>Increasing and widening knowledge</i> Curiosity	<i>Increasing and widening knowledge</i> Quality care Innovative ideas with and by others Talent development Effective team work

'Not important' category	
Functioning in a team <i>Catching up in terms of previously missed learning opportunities</i> Bond Breaking through the daily routine <i>Professional network</i> Breaking through solitary work <i>Subsidies</i> Job retention <i>Retraining</i> <i>Meeting expectations</i> <i>Negotiating labour conditions</i> Complying with an obligation <i>Pay increase</i> <i>Acquiring status</i>	<i>Catching up in terms of previously missed learning opportunities</i> Consolidating labour market position <i>Meeting expectations</i> Certification of competences <i>Professional network</i> Personnel recruitment <i>Acquiring status</i> <i>Retraining</i> <i>Subsidies</i> <i>Negotiating labour conditions</i> <i>Pay increase</i>

Employees indicate a few more reasons, which they do not consider to be really important motives for participating in education and training. But eight of the 14 perspectives cited as 'not important' by employees were also cited by employers, managers and key agents in education and training. None of the parties cited very important exclusives in terms of education and training. An overview of the exclusives which employees and employers consider important is given in table 4.

Table 4: Exclusives per group of respondents for the 'important' category

Education and training exclusives	
Employees	Employers, managers and key agents in education and training
Workload Not interesting <i>Wrong timing</i> <i>Other organisational priorities</i> <i>Lack of personal development</i> Lack of effectiveness <i>Too costly</i> <i>Not useful</i> <i>Too much time</i>	No knowledge contribution <i>Too costly</i> <i>Too much time</i> Bad reputation of the educational institution <i>Wrong timing</i> Level is too high or too low <i>Not useful</i> <i>Lack of personal development</i> <i>Other organisational priorities</i> Health reasons

Six exclusives are cited as 'important' (in *italics*) by both employees as well as employers and managers. Employees cite another three reasons for not taking part in education and training: 'workload', 'not interesting' and 'lack of effectiveness'. Employers cite another four reasons for not letting their employees follow education and training, i.e., 'no knowledge contribution', 'bad reputation of the educational institution', 'level is too high or too low' and 'health reasons'.

The majority of the education and training exclusives are cited as 'not important' by employees as well as employers, managers and key agents in education and training. This and the fact that neither of the two parties has cited exclusives as very important naturally elicit the reflection whether they responded with socially desirable answers. It can be embarrassing to oppose the official discourse on lifelong learning. Moreover the respondents who all participated of their own volition in this survey are probably slightly more in favour of permanent education and training than those of the group of so-called 'non-training companies'.

4.2 Contextual elements and conditions

The above findings are the outcome of a study among a wide variety of smaller and larger labour organisations in various profit and social profit industries. They give an idea of the wide variety of real perspectives and exclusives that play a role among employees and key agents on the employer side and of the relative weight that stakeholders attribute to them. But it is clear that the labour organisation's context also determines which perspectives and exclusives take the upper hand and where there are opportunities for negotiation in order to arrive at more convergence and support. This also became apparent in the second part of the study. HR policy in general and education and training policy in particular are determined in the triangle made up of an organisation's strategy (S), structure (ST) and culture (C). The table below provides a summary of the context and restrictive conditions that may play a role in whether one participates or not in education and training.

Table 5: Contextual elements and restrictive conditions that impact perspectives and exclusives.

Contextual elements	
Type of organisation	Type of personnel
Depending on the type of organisation the perspectives and exclusives are viewed from a different angle (cf. University vs. Non-university college) (ST) Depending on the industry's knowledge-intensive nature (C) Organisation's size (learning commitment is higher in smaller organisations) (ST) Are there measures which promote education and training? E.g., internal consultation structures, a good understanding between the employer/employee (ST) Stable organisation or organisation with a huge employee turnover? (S)	'The employee' does not exist. Employees are quite different. (C) Difference between 'unskilled' (especially talent development, professional development) and 'skilled' employees (especially job security and pay) 'Unskilled' workers are more resistant, have had a difficult time at school, spent years in the same job without learning and have less self-confidence. (C) Perspectives and exclusives may be latently present (ask sufficient questions). (C) Perception of employees at work also plays a role (e.g., why do I have to follow a training for this job?) (S) Ethnic origin/language (C) Often the interpretations and content of education and training are different for the various education and training stakeholders. (S)
Conditions	
Education and training and HRD policy	Organisational policy
A mental shift is necessary, employees have to understand that they have to learn because of certain changes. (C) Education and training should be targeted and dosed. Education and training not as a reward (only those that have a learning attitude are rewarded, the others are not) (S) 'Ad hoc' education and training or to support one's career development? (S) Pursue a win-win situation (both in terms of employer and employee interests) (S) Education and training is the shared responsibility of the employer and employee (S) Role of the managers (ST) Transfer to the workplace (C) Evaluating (C) Use education and training as a resource, not as an objective (S) Education and training has to be useful/relevant for one's job (S) Is education and training in the organisation targeted or rather based on free choice? (S) Education and training should be combined with other career development measures or should be part of career development policy (S)	Perspectives and exclusives have to be seen in the frame of a certain organisational policy (S) Depending on what policy-makers priorities are (S) Education and training should be seen as long-term measures, not a way of dealing with issues in an ad hoc manner, to deal with shortcomings in employees. Time has to be reserved for it. (S) Education and training should not be considered unilaterally based on the organisational vision and objectives; it should also be organised based on employee's interests. (S) Learning environment and appetite for learning have to be present (understand the importance of learning, throughout the organisation). (C) Clear communication and information when organising education and training. (ST) Education and training have to be linked to the organisation plan (e.g., HRM and CEO on equal terms). (S) Education and training measures have to be present (budgets, hours, etc.) (ST)

5. Conclusions and policy implications

The above overview shows that several contextual elements and conditions can play a role. These contextual elements and conditions influence the appearance as well as the importance of a number of perspectives and exclusives in a labour organisation. The point is to organise a discussion aimed at generating support by pursuing an optimum convergence between the different interests. But according to Sterck (2001) this agreement is not coincidental because it is determined by the pursuit of a difficult balance between control on the one hand and a system and involvement on the other hand. An education and training or learning policy that is properly understood can play a significant role as a regulator of interests by creating a platform for all the voices, all the perspectives without invoking pre-determined exclusion mechanisms. And these, at times, can be persistent. Van der Krogt (2007) after all emphasises that different stakeholders have different ideas or opinions about an employee's professional development in labour organisations. He observes that employees possibly do not have much of a margin to operate according to their own professionalization or learning strategies within the labour organisation. "Several stakeholders will want to exert influence on employees' professional development. It cannot be simply expected that these will all operate along the same lines and that they will support employees' ideas about their career development." (van der Krogt, 2007, p.13). Mulder (1993) also points out that only very few managers are currently capable of holding a discussion with their employees, whereby they help their employees clarify their insights and assumptions as regards career development needs by asking questions. According to Mulder this interest in an 'instructive dialogue' will increase in the future.

In order to contribute to this a discussion guideline was created based on the survey research and the case review in order to hold a documented discussion in the workplace. See: http://ppw.kuleuven.be/o_en_o/pool. The researchers mainly wish to focus on the following recommendations when negotiating education and training and when applying this discussion guideline:

- When outlining an education and training policy for the organisation and the labour market and when making decisions about participation in certain education and training activities it is worth raising the issue of the perspectives and mapping them. This promotes motivation for participation, the selection of appropriate education and training

activities and increases the opportunities for transfer during and after the education and training activity. Do not lose sight of exclusives but especially create positive energy by defining and exploring perspectives;

- Make sure that several perspectives play a role when the decision to organise education and training is taken, this will make the motivation stronger and less dependent on one perspective – which may not always be possible to achieve;
- It becomes even more interesting when perspectives of different types (see the clusters) can play a role;
- Try to arrive at a win-win mix: a cluster of perspectives in which the organisational interests and employee interests are covered;
- Do not only take into account short-term perspectives and interests when considering perspectives for an education and training policy and for education and training decisions but also medium to long term perspectives ;
- Start from the assumption that everyone has perspectives and do not fall into the trap of thinking that some people are not motivated to learn and take part in education and training. Perspectives and motives may be latent, unspoken, may have never been considered or people are too inhibited or embarrassed to express them.

The 'discussion guideline' wishes to be a tool to generate a sufficient amount of support. Because without a discussion perspectives and exclusives for participation in skills development and permanent training in labour organisations and careers will continue to be characterised by a rhetoric about the importance of education and training for competence development, resulting in low participation.

Full reference of study report(s) and or paper(s) and other key publications of the study summarised here

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