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WP3

Training manual Family Responsible Organisations

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Preface

This document has been elaborated by partners of Leonardo da Vinci TOI project "Family Responsible Organization". This document aims to enhance competences of trainers and teachers in work life balance issues.

The Lifelong Learning Programme is, as of 2007, EU's framework programme for education and skills development with the objective to "contribute through lifelong learning to the development of the Community as an advanced knowledge-based society, with sustainable economic development, more and better jobs and greater social cohesion, while ensuring good protection of the environment for future generations." One of the specific objectives of the Programme is to "reinforce the contribution of lifelong learning to social cohesion, active citizenship, intercultural dialogue, gender equality and personal fulfilment".

Section 1 - Introduction to FRO

Section 1.1 FRO Curriculum Project

FRO Curriculum was a project funded by the Life Long Learning Programme, Leonardo da Vinci, meeting the needs for increased professional qualifications amongst trainers, teachers and consultants within the field of gender equality, reconciliation and work life balance policies. Increased qualifications will enable these groups to offer adequate training for enterprises focusing on management systems for gender equal and Family Responsible Organisations (FRO).

European enterprises, especially small and medium-sized enterprises (SMEs) are faced with growing global competition requiring new knowledge, skills and policies. In the European Commission's green paper from 2001 on Corporate Social Responsibility (CSR) it was underlined that a major challenge for enterprises is to attract and retain skilled workers and measures suggested to meet this challenge included life long learning, better balance between work, family and leisure and career prospects for

FRO is according to the guide “an organization that voluntarily integrates social worries regarding work, family and personal life reconciliation within its business strategies and human resources policies” (page 9). The FRO management system is “part of an organization’s management system used to develop and implement the reconciliation policy and manage the reconciliation practices (page 10). Some of the management principles highlighted in the guide are promotion of a culture that encourages reconciliation of work, family and private life; dialogues and employee participation; and approaches based on processes, facts and continuous improvement. One of key principles is equal opportunities:

“The organization should guarantee the respect of the principle of non-discrimination due to gender, racial or ethnic origin, religion or convictions, handicap, age or sexual orientation.

It will also look for equal treatment and reconciliation of work, family and private life. It is also important to achieve a balance among organizational aims and professional and individual development for men and women” (page 5)

The guide outlines three types of reconciliation practices (page 25)

- Working Practices (flexible working time, flexibility in the work place, flexibility in the length of working life)
- Professional Support and Development (training, coaching and support, task flexibility)
- Services and Benefits (support family services, working conditions, income security, entertainment and culture, other benefits)

The International Reference Document can be downloaded at <http://fro.anjaf.pt>

Section 1.3 Role of VET in promoting FRO

Vocational Education and Training (VET) is an important tool for reinforcing the implementation of management systems for gender equality and FRO. Access to knowledge and to training on this topic both for employees in educational institutions and enterprises are important in order to accelerate organisational change and development. Trainers, teachers and consultants with the necessary skills as well as sensitivity and awareness of equal opportunities will be able to support enterprises interested

in increasing their competitiveness by introducing new work life balance practices. Staff in enterprises participating in courses will increase their insight into which attitudes, behaviour and practices that promotes gender equal organisations. In terms of in-house training SMEs are disadvantaged compared to large corporations with their own training centres and a report from the EUROTRAINER Consortium highlight the importance of support for inter-company training and exchange with external trainers and training providers.⁵

Section 2 Aims and target groups

Section 2.1 Aims

The training aims at providing participants with an overview over developments within the field of equal opportunities and reconciliation policies in Europe; and knowledge about management systems and practices for gender equal and family responsible organisations. After the training, participants are expected to be able to reflect on their own training practices in light of gender equality and work life balance issues; and stimulate organisational development towards FRO by designing new training offers.

Section 2.2 Target groups and trainees profiles

The target groups for the training are trainers and teachers involved in adult education from universities, training institutions, lifelong learning centres and private training companies; consultants providing advice and training for enterprises; and human resource managers providing in-house advice and training in organisations. Participants should preferably have 180–240 ECTS⁶ credits i.e. Bachelor's degree and be interested in gender equal and family friendly policies. Experience of or interest in working with and offering training for companies, especially SMEs, is a merit as well as experience of or interest in arranging training of trainers.

⁵ EUROTRAINER Consortium (2008) Studies on Trainers in Enterprises. Key actors to make lifelong learning a reality in Europe. Study supported by the European Commission, Directorate-General Education and Culture.

⁶ European Credit Transfer and Accumulation System

Section 2.3 Beneficiaries

The beneficiaries are SMEs, their entrepreneurs and managers that will get increased access to training offers and learning opportunities on how to introduce practices for gender equality and reconciliation into their daily business operations.

Section 3 Key concepts

Section 3.1 Definitions of concepts

Experiences from the training activities in the FRO Curriculum project highlighted the importance of trainers reflecting upon key concepts with their trainees taking into consideration territorial and organisational contexts (see section 5.1 presenting the training module: Equal opportunity policy, legislation and trends). Concepts related to gender equality and reconciliation is interpreted and applied differently between coexisting welfare regimes in Europe. There is for example contrasting views on the term Family Responsible Organisation. In some countries the prefix family might be difficult to use and for example parent or worker friendly organisations are more appropriate. Against this background the manual only provides some general definitions as a point of departure for the training

The definitions used are, if nothing else is indicated, from the “100 words for equality. A glossary of terms on equality between women and men” issued by the European Commission.

GENDER: A concept that refers to the social differences between women and men that have been learned, are changeable over time and have wide variations both within and between cultures.

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

GENDER CONTRACT: A set of implicit and explicit rules governing gender relations which allocate different work and value, responsibilities and obligations to men and women and is maintained on

three levels - cultural superstructure - the norms and values of society; institutions - family welfare, education and employment systems, etc.; and socialisation processes, notably in the family.

GENDER ROLES: A set of prescriptions for action and behaviour allocated to women and men respectively, and inculcated and maintained as described under 'Gender Contract'.

GENDER ANALYSIS: The study of differences in the conditions, needs, participation rates, access to resources and development, control of assets, decision making powers, etc. between women and men on their assigned gender roles.

GENDER MAINSTREAMING: The systematic integration of the respective situations, priorities and needs of women and men in all policies and with a view to promoting equality between women and men and mobilising all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account, at the planning stage, their effects on the respective situations of women and men in implementation, monitoring and evaluation.

EQUALITY BETWEEN WOMEN AND MEN: The principle of equal rights and equal treatment of women and men.

EQUAL TREATMENT FOR WOMEN AND MEN: Ensuring the absence of discrimination on the grounds of sex, either directly or indirectly

EQUAL OPPORTUNITIES FOR WOMEN AND MEN: The absence of barriers to economic, political and social participation on the grounds of sex.

DIVERSITY: The differences in the values, attitudes, cultural perspective, beliefs, ethnic background, sexual orientation, skills, knowledge and life experiences of each individual in any group of people.

RECONCILIATION OF WORK AND FAMILY: The introduction of family and parental leave schemes, child and elderly care arrangements, and the development of a working environment structure and

organisation which facilitates the combination of work and family / household responsibilities for women and men.

WORK LIFE BALANCE: is a broad concept including proper prioritizing between career and ambition on one hand, compared with pleasure, leisure, family and spiritual development on the other. As the separation between work and home life has diminished, this concept has become more relevant than ever before.⁷

SOCIAL RESPONSIBILITY: is an ethical or ideological theory that an entity whether it is a government, corporation, organization or individual has a responsibility to society. This responsibility can be "negative", meaning there is a responsibility to refrain from acting (resistance stance) or it can be "positive," meaning there is a responsibility to act (proactive stance).⁸

CORPORATE SOCIAL RESPONSIBILITY: A concept whereby companies integrate social and environmental concerns in their business operations and in their interactions with their stakeholders on a voluntary basis. Definition from European Commission GREEN PAPER Promoting an European Framework for Corporate Social Responsibility)

⁷ For more information on work life balance http://en.wikipedia.org/wiki/Work-life_balance

⁸ For more information on social responsibility http://en.wikipedia.org/wiki/Social_responsibility

Section 3.2 European policies

Policies for gender equality, reconciliation and work life balance are high on the European agenda and this section gives an introduction to legislation and frameworks with relevance for the training.

Legislation

The principle of equal rights between women and men has existed since the first Treaty in 1957 and in 1997 the Community was granted powers to combat discrimination on the grounds of sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation - Article 13(1). Furthermore Article 137 refers to equality between women and men with regard to labour market opportunities and treatment at work and Article 141(3) to equal pay for equal work or work of equal value.⁹

Directives

Gender Equality

Equal Pay Directive 75/117/EEC

Equal Treatment Directive, no sex discrimination, direct or indirect, concerning employment, training, promotion, dismissal, working conditions (76/207/EEC, amendments 2002/73/EC)

Social Security Directive 1979/7/EEC Equal treatment between women and men in statutory schemes for protection against sickness, invalidity, old age, accidents at work and occupational diseases and unemployment

Occupational Social Security Directive 1986, principle of equal treatment for men and women in occupational social security schemes (86/378/EEC, amended 96/97/EC)

Self-Employment Directive 1986/613/EEC applies principle of equal treatment between women and men to self-employed workers, including in agriculture and provides protection for self-employed women during pregnancy and motherhood

⁹ For more information http://europa.eu/scadplus/treaties/euratom_en.htm

Pregnant Workers Directive 1992/85/EEC, requires minimum measures to improve safety and health at work of pregnant women and women who have recently given birth or are breast-feeding, including a statutory right to maternity leave of at least 14 weeks.

Parental Leave Directive 1996/34 /EC provides for all parents of children up to a given age defined by Member States, to be given at least 3 months' parental leave and for individuals to take time off when a dependant is ill or injured

Burden of Proof Directive 1997/80/EC , required changes in Member States judicial systems so that the burden of proof is shared more fairly in cases where workers made complaints of sex discrimination against their employers

Equal Treatment in Employment Directive 2002/73/EC, substantially amends the 1976 Equal Treatment Directive adding definitions of direct and indirect discrimination, harassment and sexual harassment, MS set up equality bodies.

Goods and services Directive 2004/113/EC, applies the principle of equal treatment between women and men to access to goods and services available to the public. Extends, gender equality legislation outside the employment field, for the first time.

Principle of equal opportunities and equal treatment in matters of employment and occupation 2006/54/EEC

A new Directive will enter into force on 15 August 2009 covering areas such on equal pay, treatment in employment, vocational training and working conditions and occupational pension schemes

In 2008 the European Commission proposed new initiatives to improve reconciliation of family and professional life increasing the minimum of maternity leave and strengthening the position for self employed and assisting spouses.¹⁰

¹⁰ COM (2008) 635 final A better work-life balance: stronger support for reconciliation professional, private and family life. Commission of the European Communities

Frameworks

In the European Commission's Roadmap for equality between women and men 2006-2010¹¹ one of the priority areas are reconciliation of work, private and family life. Three objectives and actions for this priority are described in the Roadmap:

- Flexible working arrangements for both women and men
- Increasing care services
- Better reconciliation policies for both women and men

In 2005 a Framework of Action on Gender Equality was established between the social partners at European level¹², which is followed up on a yearly basis. One of the priority areas is work life balance and the following elements are described as important for supporting reconciliation:

- Flexible working arrangements
- More balanced take-up of possibilities to ease work life balance
- Child care facilities and private household or caring services

Alliances

In 2007 the European Council launched an Alliance for Families aiming at promoting family-friendly policies through exchanges of experience between countries and fostering partnerships between different stakeholders in order to achieve a better balancing of professional, family and private life.¹³

The European Alliance on CSR is a business-led initiative launched in 2006 and an umbrella for initiatives by large companies, SMEs and stakeholders.¹⁴

¹¹ COM (2006) 92 final A Roadmap for equality between women and men 2006-2010. Commission of the European Communities

¹² European Trade Union Confederation, European Association of Craft, Small and Medium-Sized Enterprises, European Centre of Enterprises with Public Participation and Confederation of European Business, previously UNICE (2005) Framework of Actions on Gender Equality.

¹³ COM (2007) 244 final Promoting solidarity between the generations. Commission of the European Communities

¹⁴ COM (2006) 136 final Implementing the Partnership for Growth and Jobs: Making Europe a pole of excellence on Corporate Social Responsibility. Commission of the European Communities

Section 3.3 Suggested readings

The following publications are available for downloading on the Internet and provide more in depth knowledge about concepts and policies with relevance for FRO Curriculum.

European Commission publications

- European Commission (2005) Reconciliation of work and private life. A comparative review of thirty European countries. Directorate-General for Employment, Social Affairs and Equal Opportunities
- European Commission (2006) Family and Welfare Research. EU Research in Social Sciences and Humanities. Policy Review series no 1 Directorate-General for Research
- European Commission (2007) Changing European Gender Relations: Gender Equality Policy Concerning Employment and the Labour Market. EU Research in Social Sciences and Humanities. Policy Review series no 6 Directorate-General for Research
- European Commission (2007) Gender Equality Law in the European Union. Directorate-General for Employment, Social Affairs and Equal Opportunities
- European Commission (2007) Developing Anti-Discrimination Law in Europe. The 25 Member States compared. Directorate-General for Employment, Social Affairs and Equal Opportunities
- European Commission (2007) Corporate Social Responsibility. National public policies in the European Union. Directorate-General for Employment, Social Affairs and Equal Opportunities
- European Commission (2008) Manual for gender mainstreaming. Employment, social inclusion and social protection policies. Directorate-General for Employment, Social Affairs and Equal Opportunities
- European Commission (2008) Partnerships for more family-friendly living and working conditions. How to obtain support from the European Structural Funds. Directorate-General for Employment, Social Affairs and Equal Opportunities
- European Commission (2008) Gender mainstreaming of employment policies. A comparative review of thirty European countries. Directorate-General for Employment, Social Affairs and Equal Opportunities

Eurofound publications (www.eurofound.europa.eu)

- Eurofound (2006) Reconciliation of work and family life and collective bargaining in the European Union. European Foundation for the Improvement of Living and Working Conditions
- Eurofound (2007) Parental leave in European companies. European Foundation for the Improvement of Living and Working Conditions

Other sources

- Reingardiene, eds (2006) Between Paid and Unpaid Work: Family Friendly Policies and Gender Equality in Europe, Social research center, Vytautas Magnus University, Center for Equality Advancement, Vilnius. Book published with the support from the Community Framework Strategy on Gender Equality. (The book can be downloaded from the Centre for Gender Equality on Iceland, www.jafnretti.is)
- FGS Consulting (2007) Review of Work-life Balance Policies and Practices Across the Original EU15 Member States FGS. Study carried out on behalf of the National Framework Committee for Work Life Balance Policies in Ireland. (The review can be downloaded from the Irish Work Life Balance website, www.worklifebalance.ie)
- Steiber (2007) The Linkages between Work and Family: State of Knowledge and Policy Implications. Economic change, quality of life & social cohesion (equalsoc). Network of excellence supported by the 6th Framework for Research. (The article can be downloaded from the equalsoc website, www.equalsoc.org)

Section 4 Profile of the trainer and training methodology

Section 4.1 Profile of the trainer

Trainers delivering the programme for teachers, consultants, human resource managers and other trainers should, if possible, be selected according to the following profile: Advanced knowledge on gender equality, equal opportunities, management systems and social responsibility; previous professional experience in enterprises, preferably in SMEs; good communication and moderation skills; and ability to master interactive training approaches.

Section 4.2 Methodologies

The training methodologies have to be adapted for differing cultural and organisational contexts as well as the background of the trainer, the group of trainees and time schedule. During the course of the FRO Curriculum project different methods were tested such as process oriented training with a stepwise approach based on interactive and cooperative learning, workshops, group sessions, discussions, lectures with inputs from experts and individual case studies. A mix of lectures, group work, presentation of best practices and case studies linked to each participant's own work environment is recommended regardless of contextual framework. The standards for gender equality and diversity training methodology developed by the transnational partnership Pro(e)quality¹⁵ can be applied also for the FRO Curriculum.

Section 4.3 Resources and material

Training material used should take into consideration differing contexts and methods applied by the trainers (see section 4.2). In order to prepare the material the trainer could use both Internet based resources and publications with examples of developments in Europe.

¹⁵ A comprehensive overview over these standards can be found in "Acting Pro(e)quality. Quality Standards for Gender Equality and Diversity Training in the EU 2007" that can be downloaded at www.berlin-divercity.de. Pro(e)quality was supported by Equal and the European Social Fund.

Websites

- CSR Europe provide a toolbox to help companies and their stakeholders integrating CSR into mainstream business practices www.csreurope.org
- European Community of Practice on Gender Mainstreaming provide products and tools supporting work-life balance, www.gendermainstreaming-cop.eu
- International Centre for Work and Family at IESE Business School, University of Navarra provide cutting edge research as well as an online self-diagnosis test and index for Family Responsible Employers, www.iese.edu
- Quality Work in Gender Equality - A handbook for the workplace, www.z.lst.se/jamsthet/bestallning.php.

European Commission publications

- European Commission (2007) towards a new organisation of men's lives - emerging forms of work and opportunities for gender equality. Work Changes Gender. EU Research in Social Sciences and Humanities. Directorate-General for Research.
- European Commission (2007) Reconciliation of professional and private life: exchange of good practices. Directorate-General for Employment, Social Affairs and Equal Opportunities.
- European Commission (2007) Opportunity and Responsibility. How to help small business to integrate social and environmental issues into what they do. Directorate-General for Enterprise and Industry.
- European Commission (2008) Continuing the Diversity Journey. Business practices, perspectives and benefits. Directorate-General for Employment, Social Affairs and Equal Opportunities.
- Reconciliation of work and private life: A comparative review of thirty European countries Luxembourg: Office for Official Publications of European Communities. 2005.

European parliament

- European Parliament (2007) Gender Aspects in Lifelong Learning. Directorate General Internal Policies of the Union. Policy Department Structural and Cohesion Policies. Culture and Education. October 2007. Report by the European Association for the Education of Adults.

Eurofound publications (www.eurofound.europa.eu)

- Eurofound (2006) Working time and work-life balance in European companies. European Foundation for the Improvement of Living and Working Conditions

Eurostat publications (<http://epp.eurostat.ec.europa.eu>)

- Eurostat (2007) Reconciliation between work and family life
- Eurostat (2007) Support for the production of 10 Statistics in Focus and a statistical Panorama publication about the reconciliation between work and family life in the European Union
- Eurostat (2005) Gender gaps in the reconciliation between work and family life
- Eurostat (2005) Employment rates lower and part-time rates higher for women with children
- Eurostat (2003) Minutes of the Task Force (draft): LFS 2005 Ad Hoc Module on Reconciliation Between Work and Family Life

Other sources

- Proequality (2007) Principles for the Successful Implementation of Equality Measures (Gender Mainstreaming and Diversity Management) into Enterprises/Organisations. EQUAL Transnational Cooperation. (The publication can be downloaded from Berlin DiveCity and Pro(e)quality website, www.berlin-divercity.de)
- Joint Employment Report 2003/2004 (2004), Council of the European Union, 7069/04. Downloadable at http://europa.eu.int/comm/employment_social/employment_strategy/employ_en.htm.
- Moss, P. and Deven. F. (1999), *Parental leave: progress or pitfall? Research and policy issues in Europe*, Brussels: NIDI/CBGS publications.

- OECD (2001), 'Balancing work and family life: helping parents into paid employment', in *Employment Outlook*, Paris: OECD.
- Plantenga, J. and Siegel, M. (2004), *European childcare strategies*, Groningen: Rijksuniversiteit Groningen. Downloadable at http://www.childcareinachangingworld.nl/position_paper.html.

Section 5 Basic European training modules

FRO Curriculum has three basic training modules that are transferable between countries all modules should be accompanied with presentations of practical examples - best practices- emphasising the importance of FRO, its advantages both for employers and employees. Example of reconciliation policies and practices facilitating for employees balance work and family life. The modules can be delivered as a separate training programme or be integrated into broader programs focusing on for example human resource development, diversity management or (C)SR. Minimum length of a basic programme is recommended to be at least 8 hours and preferable the training is divided into different steps, which includes a follow up and possibilities for further training i.e. more advanced modules.

Section 5.1 Equal opportunity policy, legislation and trends

This module aims at giving the trainees an overview over legislation, policy and trends with relevance for gender equality and diversity management both in EU as well as in the given country where the training is carried out. It aims at providing trainees with definitions of key concepts (see section 3), but also with opportunities to discuss their own interpretations of these concepts. The module is divided into four sessions.

Session 1: Introduction to and definition of equal opportunities, gender equality and diversity

Session 2: Reconciliation policies, equality and labour laws

Session 3: European trends in gender equality and diversity management

Session 4: Best practices from different member states

Section 5.2 Social responsibility

This module aims at giving the trainees an overview over policy and trends with relevance for (corporate) social responsibility both in EU as well as in the given country where the training is carried out. It aims at providing trainees with examples of standards applied in Europe, what motivates employers to introduce ethic codes and the benefits of introducing a FRO Management System in companies. The module is divided into four sessions.

Session 1: Introduction to and definition of Social Responsibility

Session 2: Social responsibility standards, codes, management systems and reporting

Session 3: Business case for SR and motivation to be a responsible employer

Session 4: Best practices from different member states

Section 5.3 FRO Management System

This module aims at giving the trainees an introduction to the FRO Management System, normative references such as ISO and requirements. It aims at providing trainees with examples of reconciliation in terms of working practices (e.g. flexible working hours), professional support and development (e.g. training during long-term leave periods); and services and benefits (e.g. child-care facilities). The module is divided into four sessions.

Session 1: Introduction to the Management System and definition of family responsible organisations

Session 2: Management system requirements

Session 3: Reconciliation practices

Session 4: Best practices from different member states