

LABOUR FORCE SAMPLE SURVEY  
AD HOC MODULE ON LIFELONG LEARNING  
THE 2<sup>ND</sup> QUARTER OF 2003

Methodological instructions for interviewers

**THE REASONS OF AD HOC MODULE REALISATION**

The European Commission confirms the importance of a new comprehensive strategy towards employment, economic reform and social cohesion as part of the knowledge based society. The actions should contribute to the overall goal of full employment. Lifelong learning is considered to have an over-arching relevance for an individual's position on the labour market. The labour market is changing and new problems are emerging, like labour shortages, skill gaps and regional disparities. There is a need to adapt European education and training systems both to the demands of the knowledge society and to the need for an improved level and quality of employment.

Lifelong learning is an important factor for social and economic development as well as for social cohesion and active citizenship in the knowledge of society and economy. This means that it is important to describe the structure of participation in learning activities as well as the educational background, the labour market situation and social situation for the individual. Statistics shows in many cases that higher educational levels of citizens are strongly associated with better living conditions e.g. in terms of labour market participation, training opportunities at work and income levels. It is clear that the educational systems throughout the Union need to be responsive to the needs of the knowledge society in a rapidly changing environment.

Responding to these actual political requests the Eurostat prepared the ad hoc module on lifelong learning.

**METHODOLOGICAL NOTES**

**Ad hoc module on lifelong learning** is carried out within the Labour Force Sample Survey in households in the 2<sup>nd</sup> quarter of 2003 in compliance with the Eurostat's methodology. The questionnaire for the ad hoc module on lifelong learning (questionnaire C) follows the questions of the standard LFS questionnaires (A and B). **The target population** is every person aged 15 and over living in the household of selected dwelling. Data collection will be carry out from April to June 2003. The ad hoc module results will be processed, evaluated and published in years 2003 and 2004.

## DEFINITIONS

The aim of the questionnaire on lifelong learning is to cover all learning activities in which respondent participated during the last 12 months. The questionnaire consists of five separate parts:

- Opening part of questionnaire (C1 - C5),
- Questions that relate to the most recent learning activity (C6 - C9),
- Questions that relate to the second most recent learning activity (C10 - C13),
- Questions that relate to the third most recent learning activity (C14 - C17),
- The final part of the questionnaire (C18 and C19).

■ **Reference period** - The reference period for the ad hoc module on lifelong learning is the previous 12 months before the day of interview (for example if the interview takes place on 11.4.2003, the reference period should be from 11.4.2002 to 10.4.2003).

■ **Formal education** - the regular educational system (the formal education includes primary and secondary schools, colleges, universities and evening schools).

■ **Non-formal education** - covers all learning activities organised outside the regular education. The learning activity is always based on the relationships between a teacher - a pupil, a lecturer – a student, a coach (a trainer) – a sportsman (a trainee), etc.

Non-formal education includes learning activities such as:

- Courses (for example the language courses, the computing and IT courses, the management courses, the accounting and book keeping courses, a health and body care course, the sport and recreation courses, the sports coaching course etc.)
- Retraining course (for example cook-waiter retraining course, a hairdresser retraining course, beauty retraining course, the body massage, the leisure and tourism course, hotel receptionist course etc.)
- Conferences, seminars, meetings, workshops
- Correspondence course
- University of the Third Age (for elderly people)
- Private lessons (for example a foreign language, mathematics, Slovak language, the dance lessons, the singing lessons, the piano lessons, etc.)
- The study circles that are defined as a small group of people, who meet regularly over a long period, plan and organise their studies under the guidance of an approved leader
- Interest courses and circles (the driving lessons, the music lessons, the dancing lessons, meditation, the cooking courses, assertiveness training etc.)

The sport and sporting activities are organized under the leadership of a coach, a trainer or an expert and they are oriented towards the achievement, development and improving the person's skills, knowledge and experiences within the professional or amateur sport.

The non-formal learning includes programs that focus on the rules and techniques of participation and skill building in competitive (professional or amateur) physical activities. That means, that courses for coaches/trainers and/or umpires/referees/judges that lead to a qualification/ certificate, which allows the participants to perform some special functions, should be considered as non-formal education.

### **Attention!**

The sport activity that is only a physical sport program or a fitness activity is not included into the non-formal education. It means that if a person participated in a sport activity with purpose to „do exercise“ for example as a hobby or to abreact himself/herself, for the loss of weight, to lead a

healthy life style, etc., (s)he does not have intention to improve or to develop knowledge, skills or experiences, so (s)he is not participated in non-formal education.

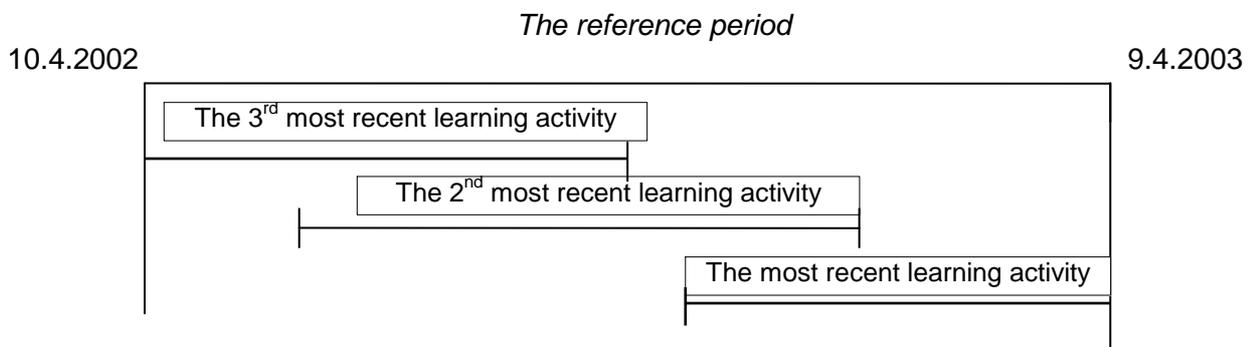
**Examples: ...**

### Selection and ordering of the tree most recent learning activities in terms of non-formal learning

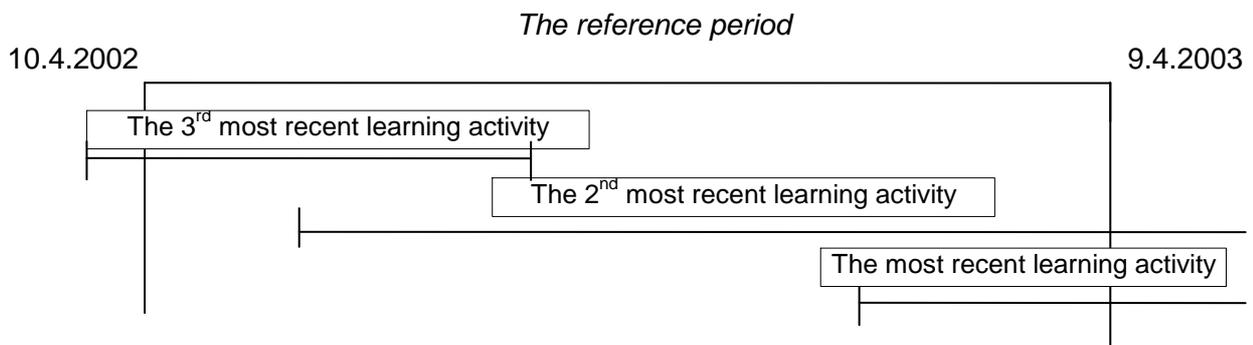
One of the main aims of ad hoc module is to gain the information not only about one learning activity (in which the respondent participated during the reference period), but also about several learning activities within the non-formal learning. The ad hoc module is aim at three most recent learning activities in which respondent participated during the reference period. In case that respondent participated in more than three learning activities it is very important to choose three correct activities!

Graphic presentation of individual situations in order to determinate the sequence of three most recent learning activities

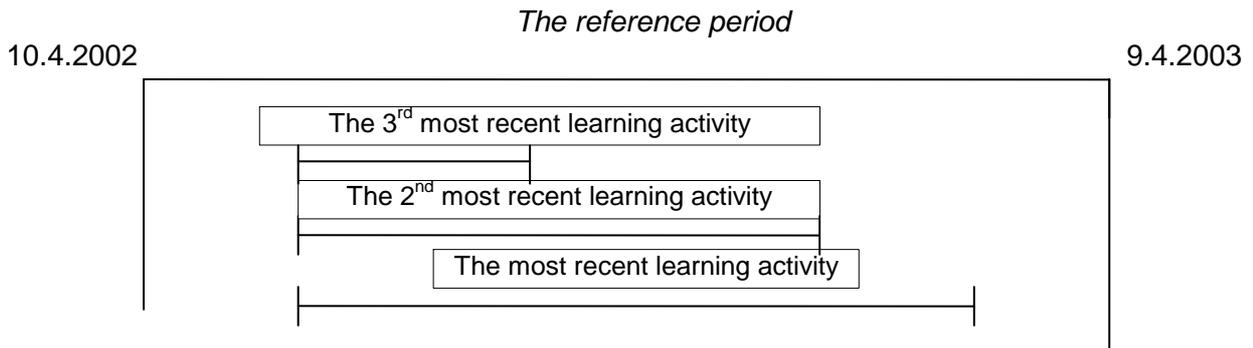
#### **The first situation:**



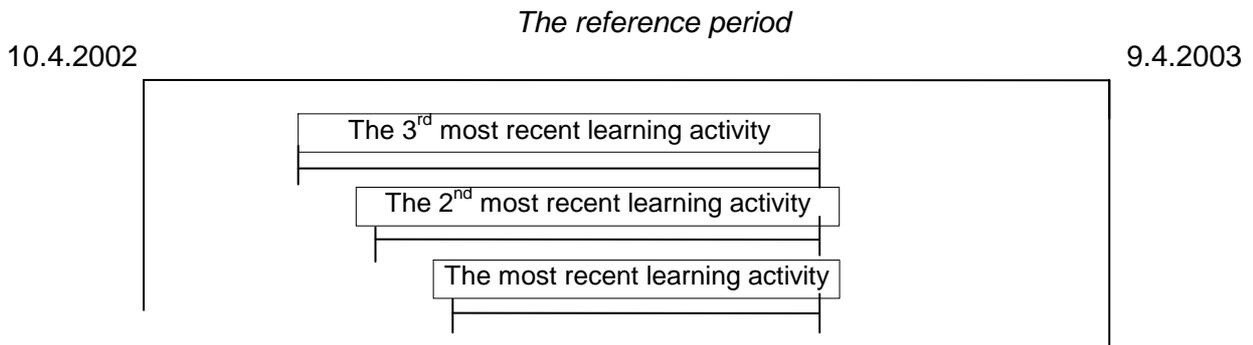
#### **The second situation:**



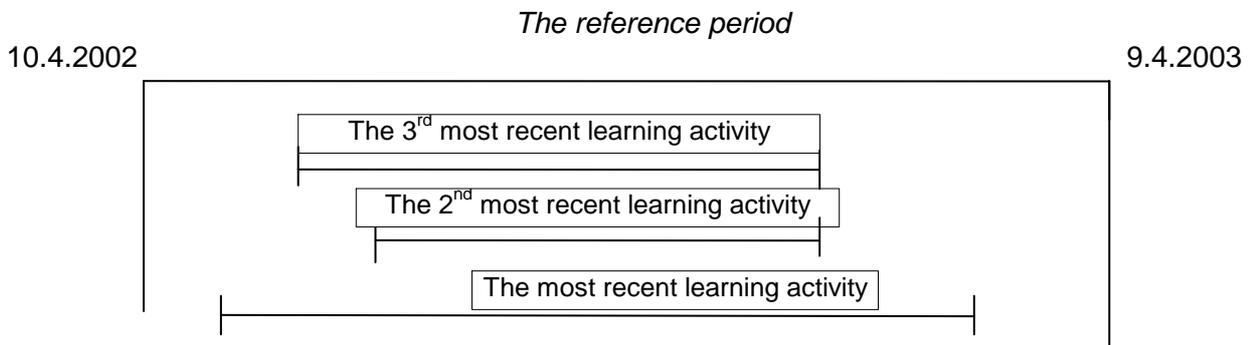
#### **The third situation:**



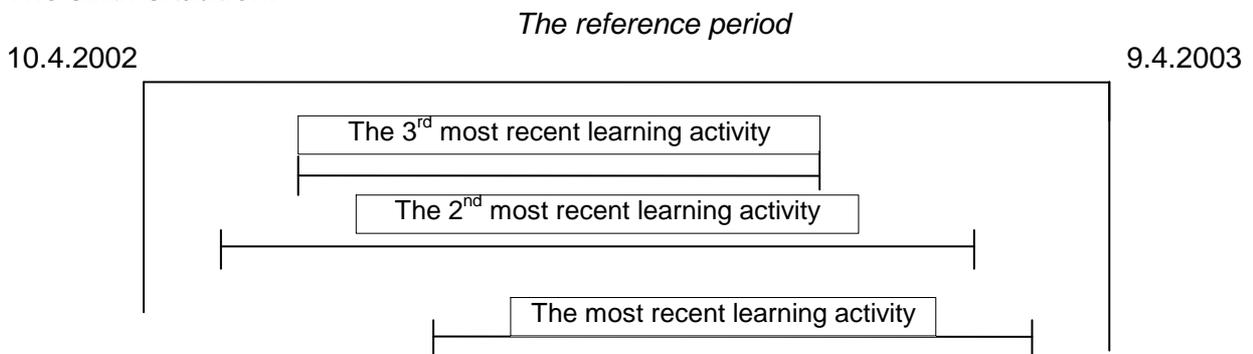
**The fourth situation:**



**The fifth situation:**



**The sixth situation:**



Determination of the sequence of learning activities:

- a) If the respondent participated in one learning activity within the non-formal learning then this learning activity should be considered as the first taught activity.
- b) If the respondent participated in two learning activities within the non-formal learning then the learning activity that was finished as last should be considered as the first learning activity. In case, that the respondent finished both these learning activities at the exactly same time or both activities had not been finished yet, the learning activity, which respondent started as the last, should be considered as the first learning activity

If all respondents' activities started and finished at the same time, the sequence will be assigned by degree of importance:

- the most important learning activity should be considered as the first most recent learning activity,
- the second most important learning activity should be considered as the second most recent taught activity.

- c) If the respondent participated in three learning activities then this learning activity, which respondent finished as the last one or had not been finished in time of the interview, should be considered as the first most recent learning activity. The learning activity, which respondent finished as first, is considered as the third most recent learning activity. In case, that the respondent finished as the last minimal two learning activities at exactly same time or these activities had not been finished in time of the interview, than the learning activity that the respondent started to attend as the last is considered as the first most recent learning activity.

If all the respondent's activities started and finished at the same time, the sequence will be assigned by degree of importance:

- the most important taught activity should be considered as the first most recent learning activity,
- the second most important taught activity should be considered as the second most recent taught activity,
- the third most important taught activity should be considered as the third most recent taught activity.

### **Attention!**

A non-formal learning activity may exceed the reference period (starting before or finishing later). The activities may exceed the reference period so the most recent may be ongoing and not finalised yet. In addition, the first one can start before the beginning of the reference period.

■ **Informal learning** – is systematic education outside the formal and non-formal education and includes self-learning. The informal learning is additional form of the formal and non-formal education. It is important to realise the fact, that random education is excluded from this form of education (see the definition below). Non-institutional education is orientated towards the development, improvement and acquisition of the respondent's skills, experiences and knowledge during the reference period. This kind of learning is realised in the life of every person, in family, in work and during the free time daily.

The informal learning includes learning activities such as:

- the study of professional books, magazines, manuals, user's guides, newspapers, manuals, articles etc.
- Computer based learning/training; online Internet based web education (beyond institutionalised education)
- Studying by making use of educational broadcasting (for example learning from video tapes, audio tapes, CD, and DVD, educational broadcasting or language courses, watching news etc.) or offline computer based (without internet and web sides, for example improving language skills by using the language Cd-rom etc.)

- Visiting facilities aimed at transmitting educational content (for example a library, learning centres, record office, archives, museums, galleries, internet café etc.) and also the centres which are orientated towards the target group of population (for example unemployed, women, young people). One of their functions is to provide the material in order to improve and to develop the person's knowledge and skills.

■ **Random learning** – is unconscious form of education that a person gains in daily life (for example by watching TV news; speaking with other people etc.). A person does not have the intention to develop, improve or renew skills, experiences or knowledge.

The ad hoc module is aimed at the collection of information about the formal (questions C1-C3), non-formal (C4-C18) and informal learning (C19). The random learning is not a subject of interest of the LLL ad hoc module.

## EXPLANATORY NOTES TO THE LLL-QUESTIONNAIRE

### OPENING PART OF THE LLL QUESTIONNAIRE

1

Opening part of the questionnaire relates to the information whether the respondent participated in regular learning during the last 12 months or did not. Every person aged 15 and over should answer this question. The question is a filter for the questions C2 and C3 gathering the data on the level and the field of formal education.

The question 1 of the questionnaire C and its explanatory notes are similar to the question 80 of the main LFS-questionnaire B. The reference period is the only difference between these two variables.

It means that we are able to gain information on formal education (regular learning) from respondents who participated in regular education during the last four weeks in the main questionnaire LFS. To collect the same facts in the questionnaire C would be the duplication. Therefore, if the respondent replies to question B80 "Yes", the interviewee should indicate the code „1“ in questionnaire C (*„Yes, the information was collected in the main questionnaire“*) and to continue with question C4. If the respondent participated in regular learning during the last 12 months but (s)he was not a student during the last four weeks (it means, his/her reply to question B80 is "No"), the interviewee should indicate code „2“ in the questionnaire C (*„Yes, I participated but no information was collected in the main questionnaire“*).

The answer „no“ (code „3“) is used if the respondent did not participate in regular learning within the last 12 months. This code also includes all respondents who were registered as pupils, students or apprentices, but they did not participate actively in the regular learning during the defined reference period (for example a student who interrupted the study because of a longstanding health problem, maternity leave, a stay in a foreign country etc.).

2

We collect the information about the level of the formal education or training (see the explanatory notes for question A14 of the main questionnaire A) according to the national "Classification of Education" (comparable with ISCED-97).

3

We gather data about the field of the highest level of education or training successfully completed. The field is coded according to the ISCED-97.

4

The question C4 relates to the participation in non-formal education. Every person aged 15 and over should answer this question. The main purpose of the variable is to gain information whether the respondent participated in a course, a seminar, a conference or other forms of non-formal education during the reference period or not. It is very important to realise the fact that non-

formal education includes a course, a seminar, a conference or other forms of the non-formal education in order to develop, to renew and to improve the respondent's professional qualification, working skills in order to achieve himself on the labour market. It also includes learning activities in that respondent participated because of personal reasons (for example a dance course, etc.).

### **Attention!**

Every learning activity, in which respondent participated within the last 12 months, is considered as the learning activity of non-formal education. It means, that every learning activity, which lasted at least 1 day during the reference period.

Therefore, the learning activity also includes activity that:

- Started before the beginning of the reference period and lasted at least 1 day during the reference period
- Started during the reference period and finished after the day of interview.

**Examples: ...**

5

The question relates to the non-formal education and the main purpose is to detect the total number of learning activities within the non-formal education, in which the respondent participated during the last 12 months.

## **THE MOST RECENT LEARNING ACTIVITY**

6

The question relates to the most recent learning activity within the non-formal learning (see definition). The aim is to collect the information about the field of education/training of the most recent learning activity within the non-formal learning. The field is coded according to the ISCED-97.

**Examples: ...**

7

The variable covers the total length of the first most recent activity indicating the number of hours (60-minutes hours) spent on courses, seminars, conferences etc.

The definition of the total time spent in learning activity by the individual is the total number of hours that the individual has spent participating in classes, seminars, conferences, lectures, tutorials etc. or receiving instruction or advice. Duration should reflect the number of **taught** hours only. Only the hours of instruction should be included into the total time spent in learning activity, which means that travelling time and homework should be excluded. The total number of hours is indicated by integral number.

**Examples: ...**

8

The variable covers the first most recent learning activity of the non-formal education and the purpose is to detect what kinds of the reasons led the respondent towards participation in the first most recent learning activity of the non-formal education.

9

The aim is to collect information about the support of the employee's learning activities by an employer and it refers to the first most recent learning activity of the non-formal education. It is not important whether the employer refunds the employee's costs or not.

**Code 1** contains all respondents who participated in the learning activity and the whole time of the learning activity was only during paid working hours. This variable refers to the respondent who participated in the learning activity:

- Inside the working place and during the working time. Employer includes all hours in education into the paid working hours. It means that employer does not demand from employee any form of compensation.

- Outside the working place and during his/her working time. Employer includes all hours in education into the paid working hours. It means that employer does not demand from employee any form of compensation.

- Outside the working place and within the employee's free time in condition, that the employer includes the whole time in education into the employee's paid working hours or allows to take these hours as day off (hours off).

**Examples: ...**

**Code 2** includes every person who participated in the learning activity and the time in education was mostly during the paid working hours. It means that this variable includes every person, who participated in the learning activity:

- Inside the working place and during his/her working time. The employer includes majority of hours in education into the employee's paid working hours. It means that employee should not compensate majority of hours and employer does not demand any form of compensation.

- Outside the working place and during his/her working time. The employer includes the majority of hours in education into the employee's paid working hours. It means that employee should not compensate majority of hours and employer does not demand any form of compensation.

- Outside the working place and within the employee's free time in condition, that the employer includes the majority of the time in education into the employee's paid working hours or the employer allows to take hours as day off (hours off).

**Examples: ...**

**Code 3** contains all respondents who participated in the main part of his/her educational process outside his/her paid working hours. It includes every person, who participated in the learning activity:

- Inside the working place and during his/her working time. The employer includes minority of hours in education into the employee's paid working hours. It means, that employee should not compensate minority of hours and employer does not demand any compensation.

- Outside the working place and during his/her working time. The employer includes the minority of hours in education into the employee's paid working hours. It means that employee should not compensate these hours and employer does not demand any compensation of it.

- Outside the working place within the respondent's free time in condition, that the employer includes the minority of the time in education into the employee's paid working hours or employer allows to take hours as day off (hours off).

**Examples: ...**

**Code 4** - The respondent participated in the learning activity only outside the paid working hours. This variable includes every person who participated in the learning activity:

- During the leisure time and the employer does not include these hours into the employee's paid working hours. (It is not important whether employer refunds his/her employee the educational costs or not!)

- During the paid and unpaid holiday

- During the employee's working time in case that employer does not include these hours into the employee's paid working hours and demands the work in addition from the employee.

**Examples: ...**

**Code 5** includes:

- Every person who had no job at the time when the learning activity took place
- Contributing (unpaid) family workers.

If person who attended a long learning activity (within the reference period) did not have a job all the time during the learning activity there are two periods of the learning activity: the period when person had a job and the period when person had no job. The coding of question C9 should reflect the work situation during the longest period of the learning activity (within the reference period). If the respondent was without a job during the longest period of the learning activity, we should give him/her code 5. It means the respondent had no job at the time when the learning activity took place. On the other hand while the respondent had a job during the longest period of the learning activity, we should give him/her codes from 1 to 4 (see the conditions and examples above).

If the respondent participated only in one learning activity within the non-formal learning then the interviewee should continue with the interview asking the question C19. In case that the

respondent participated in more than one learning activity of non-formal education the interview should continue with the question C10.

## **THE SECOND MOST RECENT LEARNING ACTIVITY**

The block of questions refers to the second most recent learning activity of the non-formal education (see conditions of the selection and ordering of the three most recent learning activities). The questions from C10 to C13 are coded according to the explanatory notes for the first most recent learning activity (see questions C7 - C9) with the difference that the questions from C10 to C13 refer to the second most recent learning activity.

If the respondent participated in just two learning activities then the interview should continue with the question C19. In case, that the respondent participated in at least three learning activities of the non-formal education, the interview should continue with the question C14 (the block of questions for the third most recent learning activity).

## **THE THIRD MOST RECENT LEARNING ACTIVITY**

The block of questions refers to the third most recent learning activity of the non-formal education (see conditions of the selection and ordering of the three most recent learning activities). The questions from C14 to C17 are coded according to the explanatory notes for the first most recent learning activity (see questions C7 - C9) with the difference that the questions from C14 to C17 relate to the third most recent learning activity.

If the respondent participated in just three learning activities then the interview should continue with the question C19. In case, that the respondent participated in more than three learning activities of the non-formal education, the interview should continue with the question C18.

## **THE FINAL PART OF QUESTIONS**

18

The variable relates to all learning activities of the non-formal education. The question collects information about the total number of hours that respondent spent within the non-formal education during the reference period. This variable refers to all persons who participated in more than three learning activities within the last 12 months. Is necessary to evaluate the total number of the hours that person spent in all his /her learning activities during the reference period.

Duration in number should reflect the number of **taught** hours only. The definition of total time spent in learning activity by the individual is the total number of hours that the individual has spent participating in classes, seminars, conferences, lectures, tutorials etc. or receiving instruction or advice. Only the hours of instruction should be included into the total time spent in learning activity, which means that travelling time and homework should be excluded.

The number of the hours in this question must be higher than the sum of the hours in the questions C7, C11 and C15.

**Examples: ...**

19

This question relates to all persons aged 15 and more. The aim of the question is to find out some information on informal learning (see the definition) - to monitor the different types of this kind of education. The question consists of four parts Ca-Cd and it is important to demand the answer to every part.

- 19a) Self-studying by making use of printed material e.g. professional books, magazines, newspapers, manuals, articles, etc.
- 19b) Computer based learning/training; online Internet based web education (beyond institutionalised education)
- 19c) Studying by making use of educational broadcasting (for example learning from video tapes, audio tapes, CD, and DVD, educational broadcasting or language courses, watching news etc.) or offline computer based (without internet and websites, for example improving language skills by using the language Cd-rom etc.).
- 19d) Visiting facilities aimed at the transmitting educational content (for example a library, learning centres, record office, archives, museums, galleries, internet cafe etc.) and also the centres which are oriented towards the target group of the population (for example unemployed, women, young people). One of the functions of these centres is to provide a material in order to improve and to develop knowledge, skills and experiences of some target group of the population.

**Examples: ...**