



**LEONARDO DA VINCI PROJECT
ADULTS MENTORING**

BG/06/B/P/PP-166 041

**NEEDS ANALYSIS CONCLUSIONS
Poland**

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INTRODUCTION

In order to plan and conduct an appropriate pilot mentoring process in the preparation phase, the research team (University of Lodz, University of Ljubljana and Edinburgh University Settlement) with the support of all partners prepared an overview of the current situation concerning 50+ in the labour market. That overview was based on official statistics, available research and information sources. In addition the organization and structure of differing systems of adult education was explored in all participating countries. The project team collected several models of good practice in the field of supporting those over 50 into employment. Additionally within the project scheme, connected to the phase of recruiting potential mentors and mentees, further research was undertaken. A wide range of methods were identified and discussed in advance (personal interviews, questionnaires etc.). This was done in order to identify those factors connected to the attitudes of employers as well as people over 50 (both retired and unemployed) which could influence the mentoring process. The data gathered by the project was analyzed and interpreted to help the project partners to understand better those factors that can influence the mentoring process and employment of people over 50 in all countries participating in the project. This identified the need to adapt the mentoring process to the specific situation in each partner country.

It is worth noting that within the project mostly qualitative research materials were gathered. Such a qualitative approach gave the project team the opportunity to better understand the situation and provide a solid basis for preparing, implementing and evaluating the mentoring process for people over 50 in a way that would allow the process to be tailored to the needs of the beneficiaries.

The information is presented in three chapters:

Chapter 1

A general description of the occupational situation concerning people over 50 in participating countries.

General statistics and demographical data concerning the employment of people over 50 are presented.

Chapter 2

This chapter presents the occupational situation of people over 50 based on their own perceptions in participating countries.

It is divided into three sections.

Firstly the issues common in all partner countries are presented.

Secondly we present those findings that suggest that there are some important issues that can cause the need to tailor the mentoring process to the particular needs of each country.

Thirdly the potential challenges for the mentoring process identified by the data and attitudes gathered by the research team are discussed.

Chapter 3

Occupational situation of people over 50 - potential employers views

The construction of chapter 3 is similar to that of chapter 2. However here the views of potential employers will be presented.

The data gathered in this chapter is based on the results of quantitative and qualitative studies carried out by the project team (in both cases references to original sources are provided).

The data obtained in research made within the project scheme is marked¹ (Q)

¹ Polish research was conducted by the team of Department of Andragogy and Social Gerontology from University of Lodz – Prof Elzbieta Kowalska-Dubas, Marcin Muszyński and Anna Gutowska

POLAND

Chapter 1 - Introduction.

General description of occupational situation concerning 50+

Retirement age in Poland is generally 60 for women and 65 for men. However many exceptions and possibilities of earlier retirement are possible. Aging of Polish situation is becoming a serious social problem. It is estimated that in the year 2020 people over 60 will make up about 26% of population. Polish statistics do not give exact information about 50+. However in that statistics of Central Statistical Office the following age groups occur: 45-54, 55-64, and 65+. Unemployment of 55+ is not a serious problem. At the end of 2004 only 4% of people from that group were unemployed (in the age group 45-54 – 22, 8%). However the real situation is different, because the average real retirement age is 56 in women and 58, 7 in men. Only 25% of men and 13% of women reach the official retirement age (65-men; 60 women).

People over 50 possess knowledge, skills, vocational and life experience which is valuable for World Economy and its competitiveness. In order to gain welfare and harmony in European labour market, Lisbon Strategy set up programs which promote employees 50+ and persuade European Society that such workers play one of the most important roles keeping Economy in equilibrium.

The great accessibility to earlier retirement in Poland is the substantial factor of vocational deactivation. In order to hold employees 50+ in labour market government cut that privilege.² According to EUROSTAT (2005) participation of elderly employees in Poland is 27.2% (For example in UK 56.9%, Slovenia 30.7% , Bulgaria 34.7%)

² Komu wcześniejsza emerytura, komu pomostówka, „Gazeta Wyborcza” wtorek 13 marca 2007, s. 20-21

Life long learning - Polish perspective

In comparison to other EU countries, people in Poland very seldom use life long learning. This idea has not appropriate support among employers.³ According to Ministry of Labour and Social Policy about educational activity of adults, getting older employees is not motivated to learn contradictory to young. Results from the same research tell us that educated people are ready to more education. The conclusion is that employees with low qualifications and also older is very hard to encourage them to rebuild its qualifications. The reason is a gap in education, (especially time this education: knowledge and skills) between young and old).

Next barrier of life long learning is lack of investment in human recourses. Employers do not want to send employees to expensive training which in their opinion is not beneficial.⁴ Main barrier of life long learning is lack of funds which can be effectively used to target investment in the infrastructure, most particularly for establishing local learning center, providing appropriate information about education offers, education itself and forecasting skills and labour market needs.⁵

Main task of life long learning policy is increasing accessibility to information about education, set up diversity educational offers, remove social and psychological barriers, provide high quality education, update information, bring in to general use technology, teaching languages, adjusting education project to local labour market needs, increase investment in human recourses and realize a huge role of life long learning in every stage of our life.⁶

³ http://209.85.135.104/search?q=cache:-4VUENStOEMJ:www.mps.gov.pl/_download.php%3Ff%3Duserfiles%252FFile%252Fnowe%252Fuczeni+esiedoroslychdruk.pdf+Ministerstwo+Gospodarki+i+Pracy+Uczenie+sie+doros%C5%82ych&hl=pl&gl=pl&ct=clnk&cd=1

⁴ MGPIPS, 2003b, Badanie Aktywności Edukacyjnej Dorosłych. Raport końcowy z realizacji zadania, Warszawa

⁵ MGPIPS, 2004, przegląd tematyczny kształcenia dorosłych, Warszawa

⁶ Tamże

Adult Education – Vocational Education

In Poland we have three basic categories of purposeful vocational learning activity. formal, non-formal and informal learning.⁷ We just focused on formal and non-formal learning.

Formal learning take place in education and training institutions, leading to recognized diplomas and qualifications. Formal vocational learning for adults have compensatory functions and allows finishing school everyone who could not do that before. There are primary schools for adults with vocational training. There are also middle schools, high schools for adults with optionally vocational training. Since 1989 Poland has made a transition to free market economy and many people started studying at a higher education level. Today still expanding higher education is a fantastic phenomena in Poland. At last, at the end of the 1990s. long expected Open University start its activity.⁸

Non-formal learning takes place alongside the main stream system of education and training and does not typically lead to formalized certificates. Polish non-formal learning can be divided for two different forms: training courses and non-training courses. Training courses is very quick form of study staff development. Here is a rich diversity of educational offers. Non-training courses may be provided in the workplace and through activities of civil society organizations and groups. This educational form is set to get vocational qualifications.⁹

Examples of good practice - vocational activity 50+

Recently, Poland set up several project of vocational activity 50+ putting lifelong learning into practice. *Sojusz dla pracy* is the first one.¹⁰ This project want reduce discrimination of aged employees and focused on four thematic working groups: training, age management, career path management, and skills/competence analysis. They organize seminars during which they present results of the working group's work. They are preparing a conference summarizing their activity and they will prepare a Good Practice Guide.

⁷ *A Memorandum on Lifelong Learning*, Brussels, 30. 10. 2000

⁸ T. Wujek, *Wprowadzenie do andragogiki*, Warszawa 1996

⁹ Tamże

¹⁰ <http://www.sojuszdlapracy.pl/>

There are also another project examples like: *Kierunek Praca, Kompas, Kultura i tradycja włókienniczej Łodzi dla bezrobotnych* and *50 na plus*.¹¹

This selected project mostly focus on reducing discrimination of older employees, create a proper training and counseling offer. There was also organized workshop: how to use the computer in hospitality, in human resources, in trading and so on. Language training enclosed classes like: ABC English, Commercial valid paper in English, English In business, English in negotiation.

Barriers to hiring person 50+

Department of Adult Education and Social Gerontology University of Lodz conducts research and surveys on local labour market. The researches focus mainly in Lodz. The aim of above mentioned research are diagnosis needs of companies that want to hire persons 50 The main conclusion was: Employers do not want hire person 50+. The reason is: poor health, policy for hiring young people, perceived lack of knowledge and skills. On the other hand they will hire people over 50 but they name some conditions that must be fulfilled:

- The most frequent characteristic which should have potential employees (vocational and life experience, qualification, responsibility, strong communication skills and so on)
- New legislation solution (low taxes, better use of structure funds and so on)
- Changing in market (more vacancies, more demand for offer products) and
- Better educational solutions (rich diversity of educational offers)

¹¹ <http://www.idea24.pl/strony/i/2426.php>

Chapter 2 - Employees' Views

The phenomenon of stopping occupational activity over 50 seems to be very widespread in Polish situation.

The questionnaire study conducted¹² through the project revealed that occupational activity is not the priority for vast majority of respondents. Only 11 put work as one of the most important life needs. The others were saying that all they want is **rest** (*"I want to rest, not having to work"; "I am tired with work", "I think I deserve rest", "I would willingly rest, I do not have energy, but I need money to live on"*).

Some of them openly state that they do not want to work (*"I would like to take care about grandchildren, I have enough of work, Now it is time for children"; "work is for young people"; "I wish I could have my retirement money"*)

Even when respondents wished to be active in occupational field the only reason for it was additional money (*"I work as a warden at park place and that gives me money, I would like to work from time to time to get some money"*). Generally work has for them only economical value. Only two respondents were thinking about voluntary work.

Another important thing was the self-perception of respondents as potential employees. They very often were mentioning weak points (*"I do not have qualifications to work nowadays"; "I do not know languages, computers"; "they need those graduated from the university"; "my qualifications are weak"*)

The most important actions to take in Polish situation are:

1. Better diagnosis of occupational situation in this age group
2. Preparation of the programs motivating occupational activity of 50%
3. Raising public awareness about the occupational situation of 50+
4. Support employees with appropriate programs for 50+.

¹² The sample consisted of 60 people (36 women and 24 men)

Chapter 3 - Employers' views

When it comes to the mentoring process itself it is worth underlying that there are some data showing that employers value mentoring quite high as a method of communication within organization. The good example can be the results of the research presented by Mierzejewska (2004). It revealed that almost 60% of Polish companies took advantage of mentoring processes during the last year. The same percentage of employers assess mentoring very high as communication tool. Such results may sound very optimistic when we think about the goals of Adults Mentoring process. However the general acceptance of mentoring as the method does not necessary mean that employers will take up mentoring systems for the particular group of 50+.

The research conducted within AM project scheme (Q)

Employment of 55+ in Small and Medium sized enterprises (SMEs) – Employers' needs
In the study conducted within AM project took part 107 SMEs.

The results were as follow:

Thirty-two companies from the sample do not employ people over 55. ¼ of companies have recently employed older employees. The same number of respondents claims that there is a total lack of tasks that can be done by 55+ in their companies.

Services

The greatest number of possible posts is available in service sector (48), namely cleaning, teaching staff education, restaurants shop assistant, security, drivers etc.

Administration

In that sector less posts are available (21). Mostly better qualified staff is needed (e. g. accountants)

Building industry

In that sector there is a preference to employ older people – especially for more responsible management positions. However high qualifications are required..

Production

In that sector machine operators and quality control staff is needed. (16).

Also many others posts not applicable for above categories were set forth.

Employers name a lot of obstacles that discourage them to employ 55+. For example they claim that:

- it is policy of the company to employ younger people
- health of older employees is weak,
- heavy physical work is impossible to do by older employees,
- interpersonal problems,
- lower ability to learn
- inability to take advantage of ICT,
- economy (privileges of senior employees),
- not enough time to prepare an older employee for the tasks before he/she leaves.

The respondents were asked if there are issues that would encourage them to employ older employees. The answers can be divided into five categories:

1st category

The first category applies to the potential features of future employee. Above all professional experience was important (54 respondents). Respondents also named: life experience, flexibility, ability to work in a team, responsibility, self-discipline etc.

2nd Category

Here legislation issues were raised. Employers named lower social insurance premiums, possibility to work less hours, subsidies from the state and EU.

3rd category

That category applies to the features of The market. Employers talked about vacancies or better economical situation of the company.

4th category

The fourth category answers were focused on educational solutions. Employers named better qualifications of older employees insured by the educational system and new educational programmes for older people. However there were only 8 employees setting for such issues.

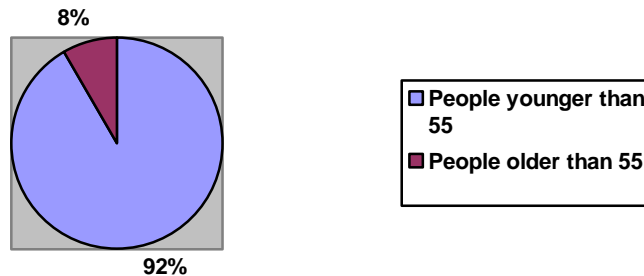
5th category

Two respondents stated that nothing would encourage them since the company policy is focused on employment of young staff.

Conclusions

People over 55 present only about 8% of all working staff in the companies that took part in the study (Fig.1)

Fig. 1. People 55+ in the companies



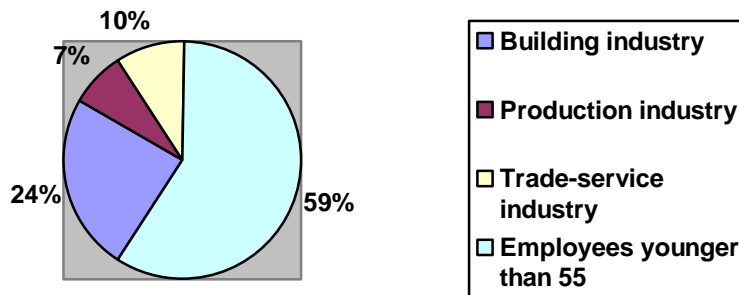
The most significant percentage of 55+ is employed in building industry - 24,14 %. That is connected to the promotion and qualification system that requires a lot of professional experience from the qualified staff (e. g. engineers). Such percentage is lower in the unqualified building staff. A lot of posts for 55+ was also declared in Administration sector. That tendency is consistent with the job offers in State Job Centre in Lodz where nearly 10% were offers in above mentioned sector¹³.

The companies working within trade and service were more often named as the potential workplace sites for 55+. That sector is now the biggest and fast-growing sector in Lodz region. However, it must be stated that the variety of tasks and qualifications required in that sector is really huge. On one hand the potential employees must be highly educated and have a lot responsibility (e. g. educators), on the other hand there are post when one can have only basic qualifications and skills (e.g. kitchen assistant).

In literature one can find information that older employees rarely find jobs in productions due to their lower physical abilities. However the results of the research within AM project are ambiguous. Respondents name poor health of older employees as a barrier for employment and at the same time when asked about possible tasks for them they name production. That can be caused by the attitude of employers who know that production tasks do not require a lot of knowledge and skills, that can be difficult to achieve by 50+.

¹³ <http://www.pup-lodz.pl/index.php?option=content&task=view&id=176>
<http://www.pup2.lodz.pl/glowna/statystyki/statystyka.html>

55+ in companies



The interesting tendency is seen when we look at the obtained data in detail. Despite the fact that most of the employers claim that they have suitable post for 55% the great majority of them have not employed older employees during the last year. There are many possible explanations for such situation. One of the possibilities is that employers are under the influence of prejudices and stereotypes about lower productivity of older employees or they can have doubts on their companies' ability to adjust the work environment for the needs of an older worker.

Very interesting is the list of potential positive features of 55+ employees. At the top the employers name work and life experience, high qualifications, flexibility and interpersonal skills. So generally key general skills are required instead of skills specific for particular post. On the other hand the same employers who are aware of specific needs of older workers tend to ignore them and treat them in the same manner as younger people. It is interesting if such requirements have really anything to do with practical skills and knowledge inevitable in the particular company. Maybe they are just "typical" requirements used in job advertisements which are often packed with requirements that are later not used in the real work.

Polish situation compared with the other participating countries

In all participating countries employers mention that the problems concerning employment of 50+ in their companies can be based on the character of work (e.g. hard physical work, shifts etc.) and/or rapid changes in the branch (Q).

Among the factors that potentially encourage employers to hire 50+ they often list issues concerning the features of older employees. Above all those are: wider professional and life experience and specific professional knowledge. They also name some factors that can be offer within national systems e.g. lower insurance premiums, tax relief etc. (Q).

At the same time employers mention a wide spectrum of obstacles. Many of them believe in ill health and high absenteeism in older employees even when they do not have proofs of it and their attitude is based on prejudices. For example Bulgarian interviews revealed that employers name the following obstacles in hiring older employees:

- ✓ lack of particular skills and competences (languages also) – 9%
- ✓ “low productivity because of the age (low concentration; flexibility; frequent illness etc. – 45.5%
- ✓ “the work it self” (specificity of the work) – 27%
- “company development factors” (stagnation; financial problems) – 18%

Such views are partly supported by scientific knowledge at least when employees doing physical work are taken into account. According to Ziekemeyer (2005) 40% of the older employees are not able to keep up the pace of work.

Polish and Slovenian employers set forth that the obstacles in employing 50+ stem from sometimes from the employment strategy of the company. Of course such strategy can be only unofficial as it is against the Labour Code, yet it is something that occurred in both above mentioned countries (Q). Some employers were openly stating that goods they sell or the service they offer do not match the older age of potential employees. The Polish example could be the shop with sport equipment and clothes that in opinion of the owner should be full of young people serving young customers (Q).

In spite of the fact that many employers believe in wider life and occupational experience of older people it seems that they do not always wish to invest in 50+. The Polish research on the random sample of 1134 employees from small and medium-size enterprises (aged 25-35 and 45-55) revealed that in their opinions employers treat them as the “worse sort” of employees – they generally do not offer them training and important tasks. That tendency makes the older employees to feel worse in comparison to younger workers (Puchalski, 2004, Puchalski, Wojtaszczyk, 2005).

Such approach towards older employees is inappropriate. It is clearly seen when we analyze the research cited by Peterson and Spiker who look on the problem of older workers from the perspective of positive psychology (2005, p. 154) suggest that “older workers may contribute equal if not more value than younger workers, because their overall human capital contribution, defined as the sum of psychological, intellectual, emotional, emotional, and social capital, is greater than the overall human capital of younger workers”. They justify such statement with the results of USA nationwide survey of 774 human resources directors. That study revealed that older workers (p. 154-155):

- 80% have less turnover
- 75% have higher level of commitment
- 74 are more reliable
- 71% have as much ability to acquire new skills
- 62% are more creative and innovative
- 80% have less absenteeism
- 48% are more flexible/adaptable
- 49% are more motivated

Such results are in line with data from the European Union survey revealing that the majority of older men and women (45+) assess that “their own skills met the demands of their work well”(Ilmarinen, 2006, p. 91). Yet, the potential discrepancy between employees’ and employers views’ is not explored.

Mc Envoy and Blahna (2001, p.47) claim that the data concerning engagement/disengagement of older workers are ambiguous. Some research revealed that older workers have more job satisfaction and organizational commitment, lower

levels of turnover and absenteeism, fewer accidents, and performance levels comparable to those of younger employees”. Other studies show just the opposite especially when it comes to attitude, performance and motivation.

In Poland and Slovenia the unofficial strategies that are part of some employers’ attitude could be not only the challenge for potential mentoring process but also employment of older men itself. The UK study revealed that such attitudes are rarely based on actual research data – they are rather based on employers’ prejudice. It seems that encouraging employers to hire 50+ means motivating them to use real data when assessing 50+ workability.

As many employers underlined the potential risk is the threat to appropriate relationships between younger and older members of the staff. Taking into account the differences in age of the mentor and mentee the potential problem is to support and trigger good quality relationship. It is even more important as in mentoring process, no matter what group is targeted, the vital thing is a human relationship (Levine, Niddifer, 1998). What is more, that relationship must be based on mutual trust (Parlsloe, Wray, 2002). In that respect one should remember that mentoring process is something more than only the way to learn and gather knowledge with the help of the other more experienced individual (which can be defined as coaching e.g. Clutterbuck, Megginson, 1999). In that respect mentoring is much more delicate social and interpersonal process that require good preparation and appropriate ethical attitude (Phillips-Jones, 2007).

The data gathered through the project shows that such things as wider experience (not only occupational) of people 50+ can be presented as encouraging factor for advertising to employers both the mentoring process and employment of older employees itself. Important point was set forth by Ilmarinen (2006). According to that author the direct discrimination is forbidden by law and occurs not very often. The real problem is indirect discrimination that can be seen in such fields as access to training or advancement in career. Such problems are easier to overcome at the level of particular organization through the appropriate project supporting older workers. Adults Mentoring project seems to meet those needs through fulfilling two out of five areas of actions proposed by Ilmarinen that should be taken to support older workers. First issue is improvement of psychosocial work environment – which means “supporting older workers by utilizing

their strengths and by respecting their experiences (p. 93). Second solution is good age-management which in Adult Mentoring Project is provided through the methodology of mentoring process that can be used and tested in organizations. It also helps to build the feature that is called by Ziekemeyer (2005) “age friendly organization”.

In the end it is worth pointing out that although there is evidence about advantages of mentoring project it can as well become dysfunctional. The thorough overview about dangers of mentoring projects (especially formalized) was provided by Scandura (1998).

In some situations the outcomes may be not satisfactory for mentors, protégées and the whole organization where the mentoring process takes place. The good example of such possible destructive relationships is Duck’ s typology cited by Scandura (1998, p. 454.):

	Psycho-social	Vocational
Bad intent toward other	Negative relations (bullies enemies)	Sabotage (revenge, silent treatment, career damage)
Good intent toward other	Difficulty (conflict; binds)	Spoiling (betrayal, regret)

Adapted from Scandura (1998)

The table present the potential negative consequences based on good or bad intentions toward other within the mentoring process. It is clearly seen that in both situations negative outcomes can occur in both psycho-social and vocational sphere.

That means that employers willing to adapt mentoring methodology should be aware of advantages but also potential disadvantages of such methodology.

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