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Guidelines for interviews for case studies in SP 4 Version 2.0 – (21 January 2008)

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1. Introduction

A first version of this document has been provided for the CoCo-Meeting on 10 January 2008. This is the revised version taking into account comments by the members of the CoCo.

It contains the guidelines of interviews with:

- members of the general management/personnel management,
- line managers of employees participating in formal education,
- employees participating in formal education.

The interview guidelines were developed in accordance with a proposal for the outline of the case studies. Therefore, we first present a proposal for the structure of the case studies (see overview 1), followed by an overview of how results of the interviews with the three groups of interviewees and the analysis of available documents provide the basis for the case studies (compare overview 2).

The interview guidelines are structured into the main parts of the outline of the case studies (A to D) and the guiding questions. Each guiding question is coded with a code for the groups of interviewees (M=Management; L=Line manager; P=Participant), the part of the case study outline (A-D), the subsections of the outline and the number of the question. In addition to guiding questions, we propose illustrating questions (*in italics*), which might be used to illustrate or exemplify the guiding questions. These questions are neither comprehensive nor obligatory, they may be used as alternatives to the guiding questions.

Interviews with members of the management and participants are expected to take approximately 45-60 minutes. Interviews with line managers – which are not obligatory – are expected to take 20-35 minutes.

Because interviews on a comparatively complex subject as HRD policies or decisions on formal training need a warming up phase for the interviewer and interviewee to build a basis for frank communication, shortening the interview's total time is not a realistic option. Furthermore, the interviewees' commitment has to be considerable strong in agreeing to participate. Based on this commitment, instructive and differentiated answers can be expected. Any advantage for finding interview partners by lowering the time requirements, will also limit the quality of the exchange of information, views and reflection.

Because rather different organisations will be studied, interview guidelines may be adjusted according to the specific organisation (e.g. small enterprises with less than 20 employees will be different from medium enterprises with up to 250 employees). In general, a careful preparation of the interviews by studying available information is expected ('be prepared at least as well as usually expected from a job applicant.').

Based on the feedback by the CoCo members, we would like to stress the following points for the preparation of the interviews.

Adjustment of the guidelines to country specific/region specific criteria: In general, adjustment of guidelines will be already made in the preparation for each single case study (see next paragraph). All partners are strongly invited to adjust guidelines to national/regional particularities. For example, in Estonia, the team expects that representatives of enterprises will have no difficulties in understanding the nature of 'formal education/qualification' because legal regulations and co-funding offers are based on this concept. Therefore, question C.1 on understanding of formal education may be enlarged to the question how the interviewee perceives the differences between formal education, non-formal education and informal learning. In all countries, a number of guiding questions may undergo revisions (e.g. to follow the different patterns of work committees and their connection to trade unions and so on). In addition, some questions will probably be subject to revision; for example, after the second case study when more experience is available. In principle, variations of the guidelines are not a problem, as the basis for further analysis is not the interviews but the case studies (and their, as far as possible, uniform content). We respect that there are different ways to achieve results for case studies of similar quality. However, for matter of transference and exchange of ideas, all partners should inform, during the processes, the coordinator for SP 4 about their adjustments and their reasoning behind these adjustments. The DUK team will collect this information and provide it to all partners, so that mutual learning is already possible during the fieldwork.

Adjustment of the guidelines to the specific situation of the enterprise and the participating employee(s): As we have limited heterogeneity of enterprises only by building up sector groups and are interested in participants in formal education on all ISCED-Levels (ISCED 0-2, 3-4, 5-6), the guideline for the particular cases (e.g. size of the enterprise; ISCED-Level of the formal education) will need to be tailored. To effectively use the available time, questions on topics could be omitted partly or fully when information is already available from other sources (e.g. yearly reports). During the interview, much flexibility and alertness is needed to carefully guide the process. Questions may be adapted spontaneously where necessary to achieve a common understanding of the topic in question. Normally, as interviewees may express themselves in freely chosen sequences, interviewees will provide answers to question before being asked explicitly. In general, for decisions on altering questions or omitting questions, the purposes of the case studies is crucial: When enough information for characterizing a particular feature of an enterprise (e.g. business strategy; approach to formal education) is available, remaining questions could be omitted.

Overview 1: Heterogeneity of interviewees addressed in the interviews

Member of the General Management, HRD-responsible	Enterprises with 10, 50 or more than 100 employee may differ widely in their organisational patterns and the explicitly and ‘wording’ ¹ , in which enterprises processes are described for internal and external communication. Based on the pre-information collected, guiding questions on the general strategy and the HRD could be reshaped.
Line-Manager	Interviewees’ educational background may also widely differ, speaking not only of the level of formal education (no secondary education, secondary education, higher education) but also about their professional background (e.g. technicians with no training in business administration or personnel management in managerial position). Line-manager is defined as the relation to the employee participating in formal education. He/She may hold a qualification on any level, share a professional education of any type and a professional training in HRM/HRD of any kind.
Employee participating in formal education	Therefore, the guideline and its wording has to be adjusted to the assumed characteristics of the expected interviewee. In general, in a small enterprise, we expect the general management also to be mostly the line manager of the participant in formal education, so that no additional interview is possible. We will interview employees with different educational background (ISCED 0-2, 3-4, 5-6), completely different occupational position (e.g. shop floor worker, foreman, team-leader, technical professional, project managers) and belong to different age groups (20-29; 30-39; 40-49, 50 and older) and reflecting on completely different occupational and career pathways.

Moreover, in the course of the interview, a flexible approach is necessary, as interviewees (especially members of the management) will often give their views in a rather comprehensive manner, covering several topics within one statement.

Time management of the interviews: Interviewers should carefully manage their time during the interview. As interviewees may engage themselves rather differently in the process (e.g. some may answer any question by a long statement, other mainly by short, more technical remarks), no general guideline can be given. During the introduction phase of the interviews, interviewer should inform the interviewee on the program, the main fields to be addressed and a short estimate on the time addressed to each of the fields. It is crucial that the question on formal education – the main topic of interest – can

¹ The language used to describe processes in strategic orientation, HRM or HRD of enterprises are often more dependent on the educational background (level of qualification, field of education/studies, year of finalization of education) than from the enterprise and its features itself. Therefore, for a small enterprise, led by a young professional holding a degree in business administration, we may find all processes described in the very same language we expect to find only in larger enterprises. On the contrary, the personnel manager of an enterprise with 240 employees, who may hold a technical expertise but have no formal managerial education may avoid any ‘business speech’ and explain himself/herself mainly by using examples. Therefore, interviews need experience to be able to adjust ‘in time’ in their communicative approach to the particular interactive situation of the interview and the mode of expression preferred by the interviewee.

be discussed in detail. (If time remains available after having discussed the question on formal education, the interviewer could come back easily to a previous point by resuming the interview and explaining, what he/she has already taken on board and what further details would of crucial interest).

Overview 2: Time management for the interviews

	Management 45-60 Minutes (up to 10 for introduction, general questions...)	Line-Management 20-35 Minutes (up to 5 for introduction, general questions...)	Employee(s) 45-60 Minutes (up to 10 for introduction, general questions...)
A General Characteristics of the enterprise	5-10 Minutes	2-5 Minutes	
B HRM, HRD	5-15 Minutes	5-10 Minutes	5-10 Minutes
C Formal Education Within HRD/HRD	20-25 Minutes	10-15 Minutes	
D Parti- cipation in formal education	D.1 Job, learning opportunities, HRD-support, career		5-10 Minutes
	D.2 Formal education		10-15 Minutes
	D.3 Use of formal education, career goals		10-10 Minutes
	D.4 Assessment, future plans		5-10 Minutes

Overview 3: Outline for the enterprise case studies in SP 4

A – General Characteristics of the Enterprise

- A.1 Main activity and characteristics of the organisation
- A.2 Business strategy
- A.3 Current challenges and initiatives to meet these challenges

B – HRM, HRD and Training Policy of the Enterprise

- B.1 Organisations of responsibilities and core processes in HRM and HRD
- B.2 HRD objectives
- B.3 HRD strategies and use of public support schemes for HRD/training
- B.4 Significance of training activities

C – Formal Education within HRM/HRD of the Enterprise

- C.1 Understanding of and awareness for formal education by enterprise
- C.2 Experiences with formal education in the enterprises
- C.3 Regulations on and support for formal education
- C.4 Assessment of promoting and hindering factors for the use of formal education within the HRD-approach

D – Participation in Formal Education, Workplace Learning and HRD Policies of the Enterprise

- D.1 The relation between workplace, workplace learning and the chosen formal education
- D.2 Decision on the formal education, processing of the decision and support/non-support by the enterprise
- D.3 Formal education, individual career goals and the work-family-personal life balance
- D.4 Assessment of promoting and hindering factors for the use of formal education for supporting the daily work and for pursuing individual career goals

E – Synthesis - The Significance of Formal Education within the HRM and HRD of the Enterprise

Overview 2: Contributions of the interviews and the analysis of printed/electronic sources to the content of the case studies

		✓ ✓ ✓ main source of information (✓) additional source for cross-checking (n) – Number of questions	Sources			
Research Question in the work description			Mana- gement	Line- Manager	Partici- pant(s)	Other Sources ²
Block A – General Characteristics of the enterprise	A.1 Main activity and characteristics of the organisation	✓ ✓ ✓ (2)	(✓) (2)	(✓) (2)	(✓) (2)	(✓)
	A.2 Business strategy	✓ ✓ ✓ (5)	(✓) (2)	(✓) (2)	(✓) (2)	(✓)
	A.3 Current challenges and initiatives to meet these challenges	✓ ✓ ✓ (1)	(✓) (1)	(✓) (1)	(✓) (1)	
Block B – HRM, HRD and training policy of the enterprise	B.1 Organisations of responsibilities and core processes in HRM and HRD	✓ ✓ ✓ (3)	(✓) (3)			(✓)
	B.2 HRD objectives	✓ ✓ ✓ (1)				
	B.3 HRD strategies	✓ ✓ ✓ (2)	(✓) (2)		(D.1)	
	B.4 Significance of training activities	✓ ✓ ✓ (1)	(✓) (1)		(D.1)	(✓)
Block C – Formal Education within HRM/HRD in the enterprise	C.1 Understanding of and awareness for formal education by the enterprise	✓ ✓ ✓ (1)	(✓) (1)		(D.1)	
	C.2 Experiences with formal education in the enterprises	✓ ✓ ✓ (2)	(✓) (2)		(D.2)	
	C.3 Regulations on and support for formal education	✓ ✓ ✓ (2)	(✓) (2)		(D.2)	
	C.4 Assessment of promoting and hindering factors for the use of formal education within the HRD-approach	✓ ✓ ✓ (3)	(✓) (3)		(D.4)	
Block D – Participation in formal education, workplace learning and HRD policies of the enterprise	D.1 The relation between workplace, workplace learning and the chosen formal education				✓ ✓ ✓ (5)	
	D.2 Decision on the formal education, processing of the decision and support/non-support by the enterprise				✓ ✓ ✓ (5)	(✓)
	D.3 Formal education, current workplace, individual career goals and the work-family-life balance				✓ ✓ ✓ (7)	
	D.4 Assessment of promoting and hindering factors for the use of formal education for supporting the daily work and for pursuing individual career goals				✓ ✓ ✓ (9)	

² Other sources are, in particular, a) information provided via homepage b) information in yearly reports c) information available by business intelligence services d) printed brochures and documents provided by the enterprises e) other published sources (e.g. newspapers). For Block D, information on the chosen formal education and the institution providing the formal education should be collected.

2. Guideline – Interview with members of the general management/the personnel management

Block A – General characteristics of the enterprise

A.1 Main activity and characteristics of the organisation

[M-A.1.1] Please give a brief account about the main activities of your organisation and its main characteristics, e.g. the year of foundation, the number of employees, etc.

What are the main fields of activity of your organisation? In which year was your enterprise founded? How many people does your organisation actually employ? How many women work for your organisation? (Approximate numbers are sufficient.) Is there a mission statement? If yes, please explain its main points...

[M-A.1.2] Please describe the cooperation of the social partners – the management, the employees and their representatives – within the enterprise.

How would you characterize the general culture of cooperation between management and employees in your organisation? Is there a work committee³ in your enterprise? Please describe the cooperation between the management and the work committee? How would you describe the interaction of your enterprise with the representatives of trade unions responsible for the employees in your organisation? Is your enterprise obliged to follow any collective agreements for all/ a part of your employees; Please specify...

A.2 Business Strategy

[M-A.2.1] Please describe the key elements of your business strategy.

Do you have a business plan? If yes, what are the key issues in your business plan? What are the significant competitive advantages of your organisation?

[M-A.2.1.1] Please describe the significance of quality management within your strategies.

Do you apply any quality management approach? If yes, please briefly describe the approach. How important is your quality approach for your business as such? When have you adopted the current quality management system?

[M-A.2.1.2] Please explain the organisation's approach towards innovation.

³ Traditions of representation of employees' interests differ widely in Europe. We are interested in both, representation on a company level and impact of trade union, which might be strongly connected or not in different countries. Please adjust the question to the particular circumstances in your country. E.g. in Austria, members of the work committee (regulated by law, the *Betriebsverfassungsgesetz*) are normally members of the sectoral trade union, so discussing the relation to the work committee includes the relation to the responsible trade union.

Please describe the most significant innovations applied in your company in the past three years. (Please refer to any kind of innovation process, including not only innovation in the production process but also, for example, on the organisational level, in the field of marketing, etc.) Was your enterprise engaged in any research and development (R&D) activity in the past three years?

[M-A.2.1.3] Please characterize the significance of marketing, customer relationship management and market development.

How would you describe the structure of your customers? How important is the constant co-operation with customers? What are your main markets? What are your current market development activities? Are there any markets newly explored by your enterprise?

[M-A.2.1.4] Please specify the importance of a competition on prices for your strategy.

How sensible are any increases in costs for the competitiveness of your products? How would you characterize the prices for your products in comparison to your main competitors? How important are initiatives to cut costs? Speaking of your personnel costs, how would you characterize your wage policies? Are you in the position to offer wages above the average of your sector or below the average?

A.3 Current challenges and initiatives to meet these challenges

[M-A.3.1] Please explain the most significant challenges and changes with the past years (2005-2007).

Please briefly describe the economic success of your organisation in the past three years. Are there any changes in the ownership of the enterprise? Are there major changes in the organisation structure? Has the organisation engaged itself in new fields of activity? Has engagement ceased in any former field of activity? Has the size of your workforce changed significantly?

Block B – HRM, HRD and training policy of the enterprise

B.1 Organisations of responsibilities and core processes in HRM and HRD

[M-B.1.1] Please give a brief account of the personnel structure of your organisation with regard to qualification and age.

Please describe the qualification requirements of the work force of your enterprise. Could you specify roughly the distribution of employees a) mainly unqualified b) qualified c) highly qualified? Could you describe the labour turnover in your enterprise?

[M-B.1.2] Which are the basic HR policies of your organisation?

Could you tell me a little bit about staff issues related to this organisation? How easy is it to hire qualified and motivated staff? How difficult is it for your organisation to hire qualified and motivated

staff? How important is numerical flexibility of your work force? Within your industry, do you pay above average wages? Are there any policies to increase productivity by decreasing the head count? Have you any policies to reduce job fluctuation? How important are retention policies for your enterprise? Do you regularly use temporary work? Have you specified particular career pathways for your employees? If yes, please describe these pathways.

[M-B.1.3] How are the responsibilities for HRM and HRD shared within your organisation?

Has your organisation a unit for HRD and training? Are the units of your enterprises entitled to decide on HRD initiatives, including training? Who is responsible for hiring new employees?

B.2 HRM and HRD objectives

[M-B.2.1] Which are the main aims of your HRM and HRD policy?

Please describe the available support for the professional development of your employees? Please describe your general HRD approach.

B.3 HRD strategies and instruments

[M-B.3.1] Which activities for HRD do you apply in your organisation⁴?

Have you established a regular appraisal interview? If yes, please describe your experience. How is communication between employees supported? Are there any regular meetings for exchange of ideas and experiences? Who is involved in these meetings? Do you voluntarily support activities involving informal or formal learning as exchange programs and job rotation or the attendance to fairs? If yes, please describe... Do you intentionally foster workplace learning by the way work is organized? Do you assess learning conduciveness of the work places in any way? Do you apply any competence management system? If yes, please describe...

[M-B.3.2] Does your organisation make use of public support for HRD and training?

Are you informed about public co-funding offers for HRD and training activities? Do you use any public co-funding scheme for your training activities? If yes, please describe your experiences...; If not, please explain, why not...; Do you use any public support mechanisms, especially to co-fund formal adult education?

B.4 Significance of training activities

[M-B.4.1] Please give an account of the training activities of your organisation and the resources applied for training.

⁴ Question for the self-description by the enterprises. Additional questions should be used only to further develop the picture. Additional information on HRD (especially training) will be provided also by the following questions.

Does your enterprise offer training on a regular basis? Please describe your most recent training activities and explain why training was offered. Do you have a personnel development plan? Do you have a training plan? How do you assess the training needs of your employees? Do you have a regular training plan? Do you have a formal training budget? How are decisions on training made within the enterprise? Who is involved in this decision-making? Do employees of your organisation provide training for their colleagues? Could you provide us with any benchmark on your training activities? (E.g. training days per employee; percentage of employees participating in training, training costs per employee; training costs as a percentage of the payroll)

Block C – Formal Education within HRM/HRD in the enterprise

C.1 Understanding and awareness of formal education by enterprise

[M-C.1.1] Could you please explain your understanding of formal education?

What does formal education mean to you? Do you distinguish between formal education and other forms of education? Do you see any differences between formal education and other forms of education in your enterprise, e.g. the way it is offered or negotiated?

Our study is mainly focusing on formal education of adults. By ‘formal education’, we refer to offers leading to a certified qualification recognised in the national qualification system. In the following, we would like to refer only to this definition of formal education.

C.2 Experiences with formal education in the enterprises

[M-C.2.1] Please describe the experience of your organisation with the participation of its employees in formal education. (If possible, please refer on this occasion also to the participation of N.N, who is prepared to share her/his experience with us in a coming interview.)

How frequently do employees participate in formal adult education? What are the main formal educational pathways chosen by the employees of your enterprise? Does formal adult education play any particular role within the HRD policy of your enterprise? Please describe this particular role. If yes, why is this the case? Can you describe a case, where participation in formal education of an employee turned out rather useful for your organisation? Are there any objections to participation of employees in adult education? Are there any risks reflected in a general manner? Does your organisation cooperate with educational institutions offering formal adult education? If yes, please name the institutions and explain the nature of cooperation.

C.3 Regulations on and support for formal education

[M-C.3.1] Are there any guidelines/defined procedure/regulations/rules⁵ on how the participation of employees in formal education should be processed within the organisation?

⁵ We are asking for any kind of defined procedure on the company level, no matter how strictly this procedure is implemented.

[M-C.3.2] Are there any general policies (approaches, traditions...) of your organisation to support the participation of employees in formal education?

C.4 Assessment of promoting and hindering factors for the use of formal education within the HRD-approach

[M-C.4.1] What are, in general, the advantages and what are the disadvantages of the participation of employees in formal education for your organisation?

[M-C.4.2.] What would foster the interest of the organisation in their employees participating in formal education?

[M-C.4.3] What are the factors limiting the engagement of the organisation for supporting their employees in participating in formal education?

3. Guideline – Interview with a line manager of one/more participants in formal education

Block A – General characteristics of the enterprise

A.1 Main activity and characteristics of the organisation

[L-A.1.1] Please give a brief account about the task of your unit and the contribution of your unit to the enterprise in general.

[L-A.1.2] How would you assess the general climate within the enterprise and the cooperation between the management, the employees and their representatives in particular?

A.2 Business strategy

[L-A.2.1] Please describe the main contributions of your unit to the success of the enterprise as such.

[L-A.2.1.2] Please describe the most recent innovation activities on a unit level within the past three years.

A.3 Current challenges and initiatives to meet these challenges

[L-A.3.1] Please describe any significant change within your unit within the past three years.

Block B – HRM, HRD and training policy of the enterprise

B.1 Organisations of responsibilities and core processes in HRM and HRD

[L-B.1.1] Please give a brief account about the qualification structure of employees you are responsible for.

[L-B.1.2] What are your main principles in managing the employees you are responsible for?

How would you describe your approach in managing your team? How would you describe your personal style of leadership? When communicating with your team members, what is most important for you? Could you describe your approaches to providing feedback for your team members?

[L-B.1.3] What are your main responsibilities in HRM and HRD?

B.3 HRD strategies and instruments

[L-B.3.1] What activities for HRD do you apply in your unit?

[L-B.3.2] Do you use any public support schemes for training within your unit?

B.4 Significance of training activities

[L-B.4.1] Please give an account of the training activities of your unit.

Block C – Formal education within HRM/HRD in the enterprise

C.1 Understanding of and awareness for formal education by the enterprise

[L-C.1.1] Could you please explain your understanding of formal education?

What does formal education mean to you? Do you differentiate between formal education and other forms of education? Do you see any differences between formal education and other forms of education in your enterprise, e.g. the way it is offered or negotiated?

Our study is mainly focusing on formal education of adults. By ‘formal education’, we refer to offers leading to a certified qualification recognised in the national qualification system. In the following, we would like to refer only to this definition of formal education.

C.2 Experiences with formal education in the enterprises

[L-C.2.1.1] Please describe your experience with the participation of employees in formal education.

[L-C.2.1.1] Please refer, in particular, to the participation of N.N, who is prepared to share her/his experience with us in a coming interview.

C.4 Assessment of promoting and hindering factors for the use of formal education within the HRD approach

[L-C.4.1] What are, in general, the advantages and what are the disadvantages of the participation of employees in formal education for the organisation?

[L-C.4.2.] What would foster the interest of your unit in their employees participating in formal education?

[L-C.4.3] What are the factors limiting the engagement of your unit for supporting their employees in participating in formal education?

4. Guideline – Interview with an employee participating in formal education

Block A – General characteristics of the enterprise

A.1 Main activity and characteristics of the organisation

[P-A.1.1] Please give a brief account about the task of your unit and the contribution of your unit to the enterprise in general.

[P-A.1.2] How would you assess the general climate within the enterprise and the cooperation between the management, the employees and their representatives in particular?

A.2 Business Strategy

[P-A.2.1] What are, in your view, the main foundations of your organisation's success?

[A.2.1.2] Please describe the most recent innovation (e.g. the use of a new technology, a significant change of the organisation of work, a substantial renewal of the production line you are responsible for) within the range of your work.

A.3 Current challenges and initiatives to meet these challenges

[P-A.3.1] Please describe any significant changes within your unit and your workplace within the past three years.

Block D – Participation in formal education, workplace learning and HRD policies of the enterprise

D.1 The relation between workplace, workplace learning and professional experience

[P-D.1.1] Please describe in detail your current job assignment.

Please describe your current position and its assignments. What are your current responsibilities?

[P-D.1.2] How would you describe the opportunities to learn and to develop your skills and competences while following your daily responsibilities?

How would you describe your options to further develop your skills and professional competence in your current job? Just for gaining a clearer picture of the opportunities for workplace learning in your current position: Within the past three months, how often have you had the impression of having learned something significantly new for you? Given the daily changes in your position, how long do you think it

would be possible for you to leave your job without losing the track? In addition, how long do you think a qualified colleague would need to fill your position?

[P-D.1.3] Please give an account of offers by your employer to support your workplace learning and professional development. (With regard to your formal education, we will come back to this separately.)

Do you feel supported by your employer in doing your job with regard to your personal development? If yes, how does your employer/your line manager support you? What support do you actually miss? Have you participated in any training activities offered by your current employer? If yes, please describe the activity and assess its usefulness for your current job.

[P-D.1.4.] Are you, in general, satisfied with your current position?

[P-D.1.5] Please give a brief account of your educational and occupational career.

How long have you held your current position? How long have you worked for your current employer's organisation? Please give a brief account of any former occupation. Please describe the most important positions in more detail.

D.2 Decision on the formal education, processing of the decision and support/non-support by the enterprise

[P-D.2.1] What formal education activities did you actually attend or have you recently attended?

May I ask you about your current educational program? Could you describe it in detail? Could you describe the institution providing your program?

[P-D.2.2] What are the reasons for choosing the current education among the existing range of educational offers?

[P-D.2.3] Was your prior learning and professional experience acknowledged by the educational institution, so that you are not obliged to follow all parts of the standard curriculum?

When starting your education, does the institution acknowledge competences you have already attained elsewhere, so that you are allowed to skip some of the educational offers? If yes, please explain which competences have been acknowledged and how? Are their competences you have applied for to be acknowledged, but the institution refused to acknowledge? Does your professional experience support you in your actual program? Speaking of your actual job, do experiences or any other activities – e.g. specific projects or tasks – support you in your educational program?

[P-D.2.4] How was the decision made to take part in the educational programme and in what way have you included your employer in this decision?

[P-D.2.5] Does your employer support your participation? If yes, please tell how. If not, why not?

Does your line manager support you in your current educational program? If yes, how? If not, please describe observations or reflections on why this may be the case. Does your employer's organisation support your participation in formal education, (e.g. by adapting your working hours, contributing to tuition fees or thing like that...) - If not, please describe observations or share reflections on why this may be the case. Have you negotiated your professional future within the enterprise after completing the ongoing formal education? Is your education part of your individual career plan within your employing organisation? Is there an agreement that you will stay for a defined number of months with your current employer? In case of leaving your employer, have you agreed to a payback clause for educational support received? Do you know about an internal agreement offering support for the participation in formal adult education?

D.3 Formal education, current workplace, individual career goals and the work-family-personal life balance

[P-D.3.1] Are you satisfied with your current formal education?

What teaching methods are used regularly? Are you satisfied with these?

Are you satisfied by the organisational support of the educational institution? What are clearly strong points of your chosen program? What are weak points? Which factors make it difficult or less satisfying to attend the program?

[P-D.3.2] Can you use experiences and opportunities available at your current workplace for your actual educational program?

[P-D.3.3] Can you make use of the ongoing learning activities in your current position?

How would you assess the usefulness of your educational program for your daily work in your current position? Could you give an example of where you could make good use in your daily work of something learned in your course? (For example, are there learning projects, which you could directly import into your professional activities?) If not, why is this the case? How could your job – or the educational offer – be changed, so that a better cross-fertilization of course program and professional activity would become possible?

[P-D.3.4] Are there any conflicting requirements of your current job and your current educational program? If yes, please describe these tensions...

Do you face conflicting demands of your actual job and your participation in your educational program? If yes, please describe them briefly...

[P-D 3.5.1] What are your expectations for the completion of your current education?

[P-D 3.5.1.1] Have you negotiated with your employer any promotion or bonus for finalizing your current education?

[P-D.3.5.1.2] Do you intend to change the employer's organisation? Please discuss the options, when you would opt for a change and when not.

What do you expect from the completion of your current educational program? What are concretely the next things you expect to happen within your professional career? (If not discussed, please add the following questions: a) Do you intend to expand the assignments of your current position? b) Do you intend to change your position within your employer organisation? c) Do you intend to apply for a job

elsewhere similar to your actual one? d) Do you intend to change your field of activities/occupation completely?) Do you expect a clear increase of your income within a short period?

D.4 Assessment of promoting and hindering factors for the use of formal education for supporting the daily work and for pursuing individual career goals

[P-D.4.1] How do you managed to integrate the efforts of your current education in your work-family-personal life-balance?

May I ask you if you are living a stable partnership? Are you responsible for children or other relatives of yours? How easy is it for you to balance job requirements with family obligations and your other personnel interests? How does it work out for you in what is called job-family-life-balance? Please describe what you do to balance your efforts for your educational program and the other spheres of your current live? Please assess how easily you are able to adjust to the efforts of the program? What helps you to meet the requirements? What is particular difficult for you?

[P-D.4.2] How may the interplay between the workplace and the educational offers be improved?

[P-D.4.3] How should employers in general improve their support for employees participating in formal education?

[P-D.4.4] What are your recommendations for improving the possibilities to participate in formal education?

[P-D.4.4.1] What kind of educational offer would you look for or recommend establishing in the future?

[P-D.4.4.2] What are the factors making participation in educational programs particular difficult?

[P-D.4.5] What are your educational plans for the future?

Speaking of your career as an adult learner, do you plan to take further learning activities in the future? Please describe them...

[P-D.4.6] What are your long-term goals within your profession career?

Speaking of your professional career, have you any visions of the next steps to be achieved? Please describe your goals that you intend to pursue.

[P-D.4.7] How would you assess the impact of your formal education on your professional competences, compared to the impact of other training activities or learning experiences made while working?