

**CENTRAL STATISTICAL OFFICE**

**SOCIAL STATISTICS DIVISION**

**EXPLANATORY NOTES**

**FOR THE LFS AD-HOC MODULE QUESTIONNAIRE ON**

***„LIFELONG LEARNING”***

Warsaw 2003

## **PART AND GENERAL REGULATIONS**

### **1. The legal basis of the survey**

The „*LIFELONG LEARNING*” module constitutes a part of the Labour Force Survey, which legal basis comprises the *Programme on Statistical Surveys of the Public Statistics for 2003*

### **2. General information on the survey**

The questionnaire survey „Lifelong learning” is a part of the programme of modules concerning labour force surveys in the European Union, covering the years 2001–2004 (Commission Regulation (EC) No. 1313/2002 of 19 July 2002).

### **3. Objective of the survey**

The main objective of the survey is obtaining information on participation of persons aged 15 years or more, in regular education, education outside the regular education system (non-formal education), and in informal education.

In particular, the survey results will be used to:

- identification of the field in which education or training was attended,
- determining the number and time of learning activities the respondent has attended during the last 12 months ,
- finding reasons for participation in training,
- evaluation of the extent of the training completion,
- identification of the most often applied methods of self-learning.

### **4. The form and range of the survey**

- 1) The “Lifelong learning” module is a one-time survey within the framework of the Labour Force Survey and is carried out as a sample survey on the sample of households drawn to the LFS in the II quarter of 2003.
- 2) The survey subjects are persons aged 15 years or more, members of the sampled to the survey households for which the ZD File was completed

### **5. Organization of the survey**

The proceedings according to § 4 of the “Explanatory Notes for the Labour Force Survey”.

## **6. General methodological rules**

The module survey is carried out through the additional LFS questionnaire „LIFELONG LEARNING”.

Questions included in the questionnaire should be answered by the person whom the questionnaire concerns. However, in some cases (e.g. temporary absence, inability to get in touch with this person), another member of a household may be interviewed, providing that he/she can supply relevant information within the scope of the survey.

## **7. Interviewer's proceedings during the interview**

The proceedings according to § 7 of the “Explanatory Notes for the Labour Force Survey”.

## **8. General rules of the forms filling**

The proceedings according to § 8 of the “Explanatory Notes for the Labour Force Survey”.

## **9. The way of proceeding in case of refusal or inability to perform an interview**

In case of respondent's refusal to participate in the interview, the interviewer should explain the objective of the survey and assure that obtained information will be used for statistical purpose only.

If the respondent continues refusing, or in any other case of inability to complete the interview, only the address part of the module questionnaire should be completed. Therefore, in item 7 one of the following symbols should be coded:

**1 – lack of ZD File and the module questionnaire,**

**2 – there is ZD File, but there is lack of the module questionnaire,** due to the **respondent's refusal to** provide information concerning lifelong learning ,

**3 - there is ZD File, but there is lack of the module questionnaire,** due to **absence** of the **person** whom the questionnaire concerns, and inability or unwillingness of other persons to supply information concerning lifelong learning of this person.

## **10. Obligation to keep statistical confidentiality**

The proceedings according to § 10 of the “Explanatory Notes for the Labour Force Survey”.

## PART II DETAILED RULES CONCERNING COMPLETION OF THE QUESTIONNAIRE

### 11. Address part of the questionnaire

The address part of the questionnaire is completed by the interviewer on the basis of the Household File, without asking the respondent. Thus, in the respective items should be inserted:

- 1) in item 01 – two-digit voivodship code,
- 2) in item 02 – the dwelling number assigned by the Regional Statistical Office (within voivodship dwelling number; the number that is inserted in the top, left corner of the ZG File),
- 3) in item 03 – within-dwelling household number assigned by the interviewer,
- 4) in item 04 - the ZD File number,
- 5) in item 05 – the number of the respondent from the ZG File,
- 6) in item 06 - respondent's gender code.

The item 07 – “*reason for lack of the questionnaire*” should be completed only in case of inability to perform the interview; one of the codes described in point 9 is used.

### Section 1. Educational attainment

12. The objective of **question 1** is obtaining information on the field of the highest level of education successfully completed by the respondent, previously mentioned in the ZG File (section 1 A column 10) and the ZD File (question 70).

The interviewer should insert one of the codes respective to the **field of education completed** by the respondent according to the rules mentioned in the further part of explanatory notes.

If the respondent attained several fields (programmes) at the same level, the field of the most recent educational attainment should be chosen.

If the respondent cannot specify the field of education, the interviewer should ask about the kind of school.

In case of primary school (completed or incomplete), lower secondary school, general secondary school, the answer “*general programmes*” should be coded (code **000**). If the answer for this question does not help, code **900** – “*I can't specify*” (not known) should be used, however, this code should be used as seldom as possible.

Code **900** should be used also in case of respondents without regular school education.

**Classification of education fields** for the survey was prepared on the basis of ISCED 1997 (International Standards of Classification of Education), using mainly broad one-digit fields (the other two digits being “00”): 100, 200, 300, 400, 500, 600, 700, 800.

**Exception** comprises three fields: 1) *Humanities, languages and arts (code 200)*, including the field *Foreign languages* (code 222), 2) *Social sciences, business and law (code 300)*, including the field: *Management and marketing* (code 349), and 3) *Science, mathematics and computing (code 400)*, including three fields coded on two-digit level (third digit being “0”) – *Life science* (code 420), *Physical science* (code 440); and *Mathematics and statistics* (code 460); also two fields coded with the most detailed three-digit code – *Mathematics and statistics* (code 481); and *Computer use* (code 482).

**The rule for coding is that the respondents’ fields (speciality) of education should be coded with the most detailed code possible and only with one code.** Thus, respondents educated in the field *Foreign languages* should be coded with 222 (and not with code 200). Others with field of attainment within *Humanities, languages and arts* should be coded with 200. Respondents with field of attainment “*Management and marketing*” should be coded with 349, while persons with other detailed fields, but within the broad field *Social sciences, business and law*, should be coded with 300. In case of broad field *Science, mathematics and computing* detailed fields *Computer studies* (code 481) and *Computer use* (code 482) should be considered first. If neither of them defines the respondent’s field of educational attainment, fields *Life science* (420), *Physical science* (440), and *Mathematics and statistics* (460) should be considered. Other programmes (specialities) within the presented broad field are coded with 400.

The other, except the mentioned, fields are coded with one digit (second and third digits are replaced by “00”).

If the respondent’s field of attainment combines two (or more) of the mentioned in classification groups, it should be coded with the field that took longer to complete. In case of the same duration of education, the field with less detailed code (one- or two-digit code) should be coded.

In order to facilitate selection of the relevant field, the more detailed description of programmes (specialities) falling within the field of particular codes is presented below:

**100 - *Teacher training and education science*** - covers education of teachers of general, vocational and other subjects (e.g. languages, arts) on various levels of education, as well as pedagogy.

**222 - *Foreign languages*** - covers philology and linguistics within the range of foreign languages.

**200 - *Humanities, languages, arts*** – this broad field covers arts (e.g. painting, sculpture), music and scenic arts (e.g. acting, dance, circus, directing), audiovisual techniques and media production (e.g. photography, organization of film and TV production, sound operators), designing, crafts (artistic), religion, Polish philology, history and archaeology, philosophy and ethics.

*349 – Management and marketing* – this field covers marketing and advertising, management and administration.

**300** - *Social sciences, business and law* – is a broad field covering, beside programmes with code 349 mentioned above, also such programmes and specialities as: psychology, sociology, ethnographic studies, political science, economy, journalism and social communication, library science, information, archives, trade, finance, banking and insurance, accountancy and taxes, secretariat and office maintenance (service), law (administrative, commercial, labour, criminology).

**420** - *Life science* – this field includes *Biology* (biochemistry in Life science, biophysics, microbiology, zoology) and *Environmental science* (ecology).

**440** - *Physical science* – this code ten covers such educational programmes and specialities as Physics (astronomy, molecular and technical physics, optics), Chemistry and biochemistry in Chemical science, Earth science (geodesy, geography, geology, oceanography).

**460** - *Mathematics and statistics* – this field includes Mathematics, operational research, numerical analysis, statistics and related sciences.

**481** – *Computer science* – this field covers network administration, analyse and designing of computer systems, operational systems.

**482** - *Computer use* – includes education within the framework of maintaining databases, Internet programs, and software development.

**400** - *Science, mathematics and computing* - this code should used only if the programme included in this field couldn't be coded with any of the previously described more detailed fields.

**500** - *Engineering, manufacturing and construction* – covers, i.a. the following programmes and specialities: machine and steel industry, electricity and energy, electronics and automatics, chemical processes, mechanical vehicles, ships and aircrafts, manufacturing and processing, mining and quarrying, architecture and town planning, land construction and the like.

**600** - *Agriculture and veterinary* - covers education within the scope of crop and animal production, gardening, forestry, fishing, and veterinary.

**700** - *Health and social welfare* – includes medicine (e.g. anaesthesiology, surgery, obstetrics, psychiatry), nursing, medical diagnostics, therapy and rehabilitation, pharmacy, child and youth care and social work (welfare).

**800** - *Services* - covers education within the field of individual service for population, hotels and restaurants, travelling, tourism and vacation, sport and physical culture education, domestic services, transport service, environmental protection, protection of persons and property, safety and health at work, and armed forces and national defence.

**000 - General programmes** – code should be used for persons who obtained only general education on primary (complete or incomplete) or secondary level.

**900 - Unknown** (answer “*I can’t specify*”) – this code covers cases without any information on the field of education (programmes, specialities); it is also not known whether this education profile was general, vocational (professional) or other.

## **Section 2. Participation in regular education**

13. The objective of question 2 is finding, whether the respondent was a student/attended school during the last 12 months, or still is a student/attends a school.

Persons who answered:

- „yes – *I am a student*” – move to question 5,
- „yes – *I was a student*” - move do question 3,
- „no” - move do question 7.

14. **Question 3** should be coded with code respective to the respondent’s level of school education, i.e. kind of school the respondent attended during the last 12 months. The rules applied to this question are similar as in the „Explanatory Notes for the Labour Force Survey” (point 68, page 37).
15. **Question 4** should be coded with the system of education the respondent participated during the last 12 months. The rules for coding of this question are analogous to the „Explanatory Notes for...” (point 69 page 37).
16. **Question 5** is answered by the respondents who are studying or completed education during the last 12 months (question 2 answer 1 or 2). The objective of this question is identification of the ownership form of the school that the respondent attended. Two forms are specified: public (state owned) (answer 1) and non-public (answer 2). Among the categories codes with 2 should be counted both private and community schools.
17. **Question 6** concerns the field of education the respondent is attending or attended during the last 12 months. The same rules as in question 1 (detailed description is included in point 12) are applied to this question.

## **Section 3. Education or training outside regular school education system**

18. **Question 7** is targeted at finding whether the respondent participated in education or training outside the regular education system during the last 12 months .

**Education or training outside the regular education system** – hereafter mentioned as „**taught activities**” – covers educational activities organized in a form of courses, instructions (both: in or outside a workplace), seminars, conferences, or lectures for which the respondent has applied and participated in (also correspondence ones), as well

as private lessons (e.g. foreign languages). **All kinds of taught activities carried out under the tutelage of a teacher (instructor)** are included here. Activities may be in a form of courses or training improving job related knowledge or skills. They may also lead to acquisition of skills needed in the social life (e.g. self-defence course). The courses can be attended to improve skills for personal purposes, intellectual development or a hobby (e.g. cooking course, lectures on history of art, course in modelling). This includes both courses leading to certificates and courses not leading to certificates. If the course comprises two or more modules (units) each module is considered a separate activity (and it should be coded separately) if you can join each of them independently and have to register (apply) for each of them to attend them. If you on the contrary only can attend all of the modules as a whole and only have to register (apply) once for the whole series of modules, they are all considered as one activity..

**The undertaken activity may exceed the reference period** (the last 12 months) – it could begin earlier (than the reference period) or may be completed later (i.e. at the time of the interview the respondent is participating in taught activity – **the important fact is participation in taught activity** in the observed period, i.e. **during the last 12 months** . If the respondent participated during the last 12 months in one, two, or maximum three taught activities, after coding the appropriate number of courses go to question 9. Whereas, if the number of activities was 4 or more, move to question 8. The respondent who answers “no” (code 5) moves to section 4 (question 15).

19. **Question 8** covers only these respondents who participated in four or more taught activities during the last 12 months (i.e. gave answer with code 4 in question 7).

The objective of this question is obtaining information on the **total number of training hours** in all taught activities the respondent participated in during this period. If taught activities were held regularly for several days at the same hours, the number of days should be multiply by the number of hours. Short breaks between lectures that took place on the same day are not excluded, while the hours outside classes, or those spent on travelling time and homework should be excluded. If training started earlier than during the last 12 months, only time spent **during the last year** should be included in the total number of hours.

20. **Question 9** concerns only these persons who during the last 12 months participated in at least one taught activity training (i.e. in question 7 gave answers with code 1, 2, 3 or 4). Respondents who participated in more that three taught activities, (question 7, answer 4), describe in detail the last three ones – according to the rules stated below.

The objective of question 9 is obtaining information on the **number of hours the respondent spent in each taught activity** during the last 12 months, i.e. in answer for question 9 should be given the total number of hours that the respondent has spent on



participating in classes, seminars, conferences, lectures, tutorials etc. or receiving instruction or advice. Only the hours of instruction should be included in the total time spent in taught learning, which means that travelling time and homework should be excluded – the rules of calculation of time spent in taught learning are the same as in question 8.

In columns of the table are mentioned **learning activities A, B, C**, for which respective answers are coded. If the respondent participated **in one learning activity**, its description should be coded in column marked with **letter A**. If the respondent participated in two activities, **the answers related to the most recent activity (training) are coded in column A, while in column B are coded answers referring to the taught activity that started earlier**. If the respondent participated in three taught activities, column A contains information concerning the most recent one, column B – the second last, while in column C is included the third last.

**In case of at least two activities that were carried out at the same period, the order is decided by the starting date of the taught activity.** As the last activity – coded with the letter A – should be considered this **taught activity that started later**. For example: one activity started in December 2002, the other – in January 2003, and both were still being carried out at the time of interview. The activity that started in January should be coded as A, while the one started in December – as B.

#### **NOTICE!**

In order to facilitate completion of the module questionnaire if the respondent participated in more than one taught activity (training) over a year, it is recommended that questions 10 to 14 are asked separately for each form of taught activity (training) defined in question 9; A-the most recent one, B-second last activity, C-third last activity). This way of performing the interview will limit error possibility.

Moreover, it is recommended that question 15 (section 4) should be asked only after completing information on each taught activity (training).

**21. Question 10** covers reasons the respondent for participating in taught activities/training. Each activity/training A, B, C should be coded with one of two codes:

- 1** – job related (professional) reasons
- 2** – personal or social reasons.

The main **job related reason** covers situation when respondent participated in activity in order to obtain knowledge and learn new or increase hitherto skills needed in a current or a future job. It may improve job and/or career opportunities in a current or another field and generally improve respondent's opportunities. **Social reason** covers situation when

the respondent participated in taught activity in order to gain respect (acknowledgement) in his or her environment (community), to develop competencies required for community or social purposes (e.g. the first aid course). Whereas, **personal reasons** are related to development of respondent's own interests (hobbies), recreational or domestic purposes.

22. **Question 11** is targeted at identification of the field of each taught activity (training): A, B, C, in which the respondent participated during the last 12 months. The particular field code should be assigned to each taught activity (training). The same rules as in question 1 are applied in this question (detailed description is included in point 12).

The examples of some taught activities and their respective fields are given below:

- courses related to teacher's career development programme, courses comprising pedagogy of early school and pre-school teaching (**Teacher training and education science – 100**),
- foreign language course (English, German, Spanish etc.), courses preparing for Cambridge First Certificate in English, or similar, leading to certificates confirming fluency in a foreign language (**Foreign languages - 222**),
- fast reading course, course developing reading skills (it concerns only native language), dancing course, photography course, interior designer course (**Humanities, languages and arts - 200**),
- course in effective sale, course in marketing "effective planning and practice", course in human resources management (**Management and marketing - 349**),
- accountancy and bookkeeping courses, course in secretariat service, customer service course, lawyers applications (**Social sciences, business and law - 300**),
- network administrator course, computer system projecting /operational systems/ (**Computer science - 481**),
- course in maintaining computer software (e.g. text editor MS Word, calculation sheet MS Excel), course in maintaining databases, course in maintaining internet related programs (e.g. creating websites) (**Computer use - 482**),
- courses authorising to operate specialist equipment in construction, including operating machines and devices such as: lifts, cranes, fork-lift truck, courses in safety at work in difficult conditions, i.e. on heights, underground, courses in sewing, needlecraft and embroidery /in manufacturing/, courses in modelling (**Engineering, manufacturing and construction - 500**),
- courses organized by Gmina Offices and Agricultural Advisory Centres concerning new developments in mechanization, seed production, agricultural techniques, etc. (**Agriculture and veterinary - 600**),
- specialisation courses for doctors in medicine, first aid course, paramedic course, course in rehabilitation, massage (**Health and welfare – 700**),

- cooking course (hotels, restaurants, as well as home cooking), sewing courses, embroidery and needlecraft courses (if skills obtained from the course will be used for providing individual service or in a household), self-defence course, courses in social games, round games, like monopoly, bridge, chess, concerning recreation and leisure (**Service-800**).

23. The objective of question **12** is finding which of the previously mentioned forms of taught activity was carried out during paid working hours.

Each taught activity A, B, C should be coded with respective code.

**Answers coded 1 - 4** cover situations when respondent had a job at the time he/she participated in the learning activity. If the respondent had no job at the time when he/she participated in taught activity, then for the respective activity A, B or C (or all of them during the last 12 months) code **5** should be inserted.

If **the time spent in the learning activity** were **exclusively** during paid working hours it should be coded with answer *The time spent in the learning activity were only during paid working hours (code 1)*. This answer should be also coded if the learning activity was outside working hours, but the respondent has received payment for the hours or additional leisure hours. If **most** of hours spent in the learning activity were during regular working hours, or the respondent has received payment for the hours or additional leisure hours, the answer should be – *The time spent in the learning activity were mostly during paid working hours (code 2)*.

The self-employed persons should be treated as employed, while contributing family workers (without the contracted pay), participating in taught activities – should be coded with *The time spent in the learning activity were only outside of paid working hours (code 4)*.

If the respondent participated in the long-lasting course (training ) and had a job during a part of it, while was without a job during the other part, the longest period should be considered (within the observed 12 months). If a jobless period was longer – it should be coded with *The respondent had no job at the time when the learning activity took place (code 5)*.

24. **Question 13** concerns a level of completion of taught activity (training). Respondent is given a choice between three answers:

- I'm still participating in taught activity
- I've stopped participating in taught activity
- I have completed taught activity

Similarly to the previous questions, the interviewer should insert the respective answer code for each taught activity that the respondent participated in during the reference period.

In case the first or the second answer was marked - go to question 15, if the respondent **have completed training** - go to question 14.

25. The objective of question **14** is finding whether the respondent obtained a written confirmation of training completion, e.g. in a form of a diploma, certificate or written attest.

This question concerns only this taught activity that has been already completed (w question 13 was marked the answer with code 3).

#### **Section 4. Participation in informal learning**

26. **Section 4** concerns informal learning (non-taught learning), i.e. self-taught learning carried out by the respondent with the purpose to gain knowledge or improve skills. As self-taught learning should be understood **knowledge development** by the respondent **without participation of a teacher (or instructor)**. This form of education and training is maintained irrespective of both: organized (regular) forms of school education and non-formal – taught activities (taught learning outside regular school system, thus it should not include any courses, or lectures with the instructor.

27. The objective of question **15** is obtaining information whether the respondent has participated in the mentioned forms of self-taught learning during the last 12 months. The interviewer should read each of the mentioned four methods of learning, and code either 1 - “yes” or 2 - “no” in each case. The answer “yes” should be coded if the respondent used any particular kind of didactic materials (printed or electronic), available in a particular place (library, online, television) with the purpose of self-taught learning, irrespective of the length of this form of learning.

*Self studying by making use of printed material* refers to reading of professional literature published in a traditional printed form (books, text books, professional magazines, e.g. “Law Gazette”) with the purpose to increase knowledge (improve skills). The respondent organised the learning him/herself, it wasn’t part of a taught activity or program of studies recommended by a teacher/instructor (it wasn’t part of homework).

*Online internet based web education (beyond institutionalised education)* refers to making use via internet (on-line) of various guide books, books, professional magazines, language courses. If the respondent read previously mentioned “Law Gazette” on the internet based web, the answer 2 should be coded 2. It means that the respondent makes use of various opportunities presented by internet based web in order to improve his/her knowledge in a particular field.

## **Section 5. Supplementary information**

28. In **question 16** it should be notified whether information was supplied directly by the person whom the questionnaire concerns - (code 1), or whether it was supplied in his or her stead by the other member of the household - (code 2).