

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

Employment and Women on the 21st century in Europe: From Household economy to SME economy (Small and Medium enterprises) – MUPYME Project

Guidelines for drafting the participant observation report

As agreed, once the observation is completed it shall be displayed on a report that summarizes the observation action together with other data; both describe what we call the *Professiograph* of the household work. The data, the cold figures, should be discussed by the analyst by making a critical interpretation. We will note possible answers in brackets, but the observer/commentator's reflections are especially interesting.

We remind you that every partner of the project should draft a report for each of the 5 observations that should be made. Afterwards, they will write a summary report for which drafting we will provide an appropriate guide.

1.- Identification

Descriptive data related to:

- Name (may be real or even a pseudonym if the woman doesn't want to give her real name)
- Place
- Analyst name
- Approximate time of the observation

2.- Context

Other data that may be useful for analysing the space where the observation takes place

- Type of town (population size)
- Local economy (agricultural, industrial, commercial, services)
- Local dynamics (enriched, impoverished, emergent)
- Referential cultural environment (urban, rural, intermediate)

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

3.- Profile

Information for the correct understanding of the selected woman as the subject of study

- Age
- Educational level (certified)
- Income level or estimated social class (low, middle, high)
- Type of household (members of the family)
- Work experience outside the household

4.- Subject assessment

Informal data that may help to understand the work performance inside the household

- Where and how did she learn to perform the household?
- How many years has she been working in the household economy?
- What does she consider to be the most and the least difficult task?
- What kind of things does she consider that would have facilitated her work performance?
- Has she given up to something in order to take care of the household?
- Would she have pursued other professional career in other circumstances?

5.- Most frequent tasks

This section has to be filled in by following the Tasks File form attached to these guidelines.

6.- The performance

This section has to be filled in by following the Job Analysis form (modified) attached to these guidelines.

7.- Summary and critical reflection

This section shall be used by the observer/commentator to note everything he/she considers to be important but does not fit in any of the aforementioned sections.

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

This part of the document should be finished with a summary of the observation in which the most relevant aspects of this analysis are underlined, together with their transfer to the SMEs economy.

ANNEX 1

TASKS RECORD FILE

ERASMUS+ Programme 2015 – KA2 Adult Education
 Project n°: 2015-1-ES01-KA204-015937
 Document name: Observation Report Guidelines
 Partner: FEUP
 Author: Emilio Jurado

TASKS RECORD

TASK	EXECUTIVE	MANAGEMENT	LEVEL OF DECISION	CRITICISM	IMPACT	CORRESPONDENCE	TIME
To pay the car insurance	Partial (20%)	Partial (80%)	Shared	three	Financial area. Family mobility.	Files management. Maintenance.	5% of the working hours.

Reviewed by: Montserrat Morales Corraliza

Code: 20160119_MU_O1_FEUP_1

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

TASK: Task definition. A brief description of it shall be done and it shall be assigned to the tasks group. For example: to do the laundry to the cleaning group of the household.

EXECUTIVE: To identify if it is an executive task carried out by the performer.

MANAGEMENT: To identify if the task requires a planning, time estimates, resources identification, to measure the impact, etc.; especially if it implies the starting up of third parties' activities (family, administration, friends, suppliers, etc.).

LEVEL OF DECISION: If the task requires the unilateral decision-making or if it is shared. In that case, by who?

CRITICISM: To know the urgency of the decision-making. It can be rated in and scale from 1 to 5, where 1= The decision-making can be postpone, and 5=The decision-making can't be postpone.

IMPACT: To what, who or how the decision-making affects.

TIME: Percentage of the total time assigned to this task. We propose a rate according to the following scale:

- 1- Never
- 2- Monthly
- 3- Weekly
- 4- Daily

CORRESPONDENCE: This identification parameter is the most complex to be established, since it is about setting up the correspondence of this task with its equivalent in the economics field outside the household.

The purpose of filling in a tasks record file is to classify the operations performed upon the execution of a professional activity.

These files are designed depending on the target that each one of these have. When the target is to improve the production process we tend to give details of every movement affecting the aforementioned production process and to determine the technologic framework in which the action and the tools are developed. When the target is to improve the security, the guideline focuses on the identification of the risk parameters and on the use of protective measures...and so on.

In our case we are going to develop a file or guideline for the **tasks record related with the decision-making process**. Therefore, we pay special attention to data used for the decision-making process and its impact on the evolution of household activity.

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

We start from the tasks structuring which comprise generic activities in the household, and an approach to its equivalent in the SMEs economy.

In generic sense we can set up the following groups of tasks:

1.- Cleaning and maintenance. This refers to the activities related to cleaning and maintaining the household (to sweep, to scrub, to clean the windows, to do the laundry, to iron the clothes, to tidy the wardrobes...). It can be compared to the maintenance tasks of the systems and installations in the SMEs economy.

2.- Care of the family unit. This refers to the activities related to the care of the personal aspect of the unit members, including the healthcare and the emotional state care. It can be compared to the tasks of Security, Leadership and Motivation.

3.- Expenses and Incomes Management. This refers to the activities related to the management of incomes (salaries and other incomes) and expenses (payments and economic forecasts). These tasks can be compared to the activities executed in the enterprise field (profit and loss account management).

4.- Inventories. This refers to the activities related to the control of the inventories state regarding food, furniture, consumer staples, etc. It can be compared to the stock management tasks and logistics tasks.

5.- Purchases and relation with the suppliers. This refers to the activities related to the purchases and provisions for the household members. These activities can be compared to the purchase management and the suppliers' classification in the SMEs field.

6.- Environment impact. This refers to the tasks related to the assessment of the use of certain products and also to recycling, recovery and reuse of every type of household products. These tasks can be compared to the SMEs economy.

7.- Education and training. This refers to the activities related to the children education and support to other relatives and neighbours. It can be compared to the management and development tasks of human resources and the SMEs economy.

8.- Decision-making process and conflicts resolution. This refers to the activities related to choosing certain actions in the daily life of the household activity. Everyday appear new situations which require a quick decision-making in addition to thoughtful decisions taken by consensus among members of the household. These are tasks which are assigned to the executive management of a SME.

This file will be definitely defined during the workshop. However, we suggest to the participants the following tasks record file (exemplified).

ANNEX 2

JOB ANALYSIS FORM

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

1. JOB IDENTIFICATION.

1.1 Occupation:

1.2. An approximation to the ISCO-08 classification. See the section related to Manager and operators of small business:

1.3. Place of work. To describe the hierarchical relation in the work among:

- Other members of the family.....
.....
- Neighbourhood.....
.....
- Social and administrative institutions.....
.....
- Educational, sanitary, recreational instituions, etc
.....

2 GENERAL DEFINITION OF THE JOB

2.1. Job goals:

2.2. The job consists of:

- Isolated.....
- In group or teamwork.....
- Simple coordination.....
- Line production.....
- Others.....

2.3. Autonomy, initiative and responsibility level (Scarce, medium, vast):

Reviewed by: Montserrat Morales Corraliza

Code: 20160119_MU_O1_FEUP_1

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

- Upon solving problems.....
- Upon making decisions.....
- Upon executing them.....

3. WORKING FACILITIES USED.

3.1. Of production:

- Machinery.....
- Tools.....
- Materials.....

3.2. Non-materials:

- Standard software systems.....
- Personal software systems.....
- Networks.....
- Others.....

3.3. Interesting features related to the means of production and their use:

3.4. ¿Is it perceived any kind of evolution upon the job performance? ¿In which sense, technological, societal, organizational?

4. INHERENT QUALIFICATION FOR THE JOB, AND, IF APPROPRIATE, REQUIRED TRAINING.

4.1. Level of inherent general qualification for the job (See the classification set up by the CEDEFOP [European Centre for the Development of Vocational Training] adapted to the structure of the different Member States of the EU. Rated from 1 to 5)

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

4.2. In detail, which is the specific qualification required for the job?

- Knowledge.....
.....
- Skills.....
.....
- Experience.....
.....

4.3 Does it require any kind of specific training or rather a wide range of knowledge?

We differentiate three levels (see the glossary)

- Basic training (to mention regulated studies, if possible).....
- Professional training, in the actual sense.....
- Occupational training, in the actual sense.....

ERASMUS+ Programme 2015 – KA2 Adult Education
 Project nº: 2015-1-ES01-KA204-015937
 Document name: Observation Report Guidelines
 Partner: FEUP
 Author: Emilio Jurado

5. JOB ANALYSIS

5.1. INTELLECTUAL AND PSYCHOLOGICAL APTITUDES REQUIRED FOR THE JOB

To rate from 0 to 3 the need of each required aptitude in this scale.

0- Inappreciable 1- Scarce 2- Medium 3- High

1. General intelligence required for the job (ease of learning, reasoning, judging, and drawing conclusions).....
2. Aptitude for solving problems.....
3. Calculation skills.....
4. Ease of communication.....
5. Spatial aptitude.....
6. Creativity, ease of participation and originality.....
7. Concentration skills.....
8. Movement coordination.....
9. Manual dexterity.....
10. Ability to differentiate colors, identify and combine them.....
11. Data, ideas or sentences memory.....
12. Spatial memory.....
13. Response capability.....

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

5.3. JOB CONDITIONS AND EFFORTS (SYNTHESIS)

1. Postured adopted at work (Description):

.....
.....

2. Main characteristics of the job conditions:

.....
.....
.....

3. Main physical requirements, including sense requirements:

.....
.....
.....

4. Working hours by day.....

ERASMUS+ Programme 2015 – KA2 Adult Education
 Project nº: 2015-1-ES01-KA204-015937
 Document name: Observation Report Guidelines
 Partner: FEUP
 Author: Emilio Jurado

To rate from 0 to 3 the need of each required aptitude in this scale.

0- Inappreciable 2- Medium

1- Scarce 3- High

0 1 2 3

- 6. Physical strain.....
- 7. Mental effort.....
- 8. Nervous effort.....
- 9. Hazardous effort
- 10. Toxicity.....
- 11. Environmental aggression.....
- 12. Risks.....

13. Frequent accidents, severity and frequency.....

.....

ERASMUS+ Programme 2015 – KA2 Adult Education
Project nº: 2015-1-ES01-KA204-015937
Document name: Observation Report Guidelines
Partner: FEUP
Author: Emilio Jurado

5.4. PERFORMANCE IMPROVEMENT

1. Is it possible to improve the job performance?

- By basic training.....
- By general profesional training.....
- By specific or occupational training.....
- Only by experimenting.....

2. Are there any possibilities of receiving some training in order to improve the job performance?

- Yes.....
- No.....
- No. Only training having an indirect relation.....