



2.13 Portugal

FORMEM

Federação Portuguesa de Centros de Formação Profissional e Emprego de Pessoas com Deficiência

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2.13.1 *Methods of approach in carrying out the inventory*

In Portugal there is no great tradition of studies on Social Welfare and data surveys concerning those organisations who are involved in Job Rehabilitation are virtually non-existent. Having recognised this loophole, in 1996 FORMEM commissioned three researchers from the University of the Minho to draft an Audit and Standardisation report on Job and Training Centres for the Disabled. The study encompassed 46 organisations, 40 of whom are FORMEM associates, with the other 6 having been put forward by the IEFP (*Employment and Job Training Centre*). In view of the relevance of the information deriving from this research, a major part of the data submitted in the present inventory relate to the said study.

FORMEM – the Portuguese Federation for Job and Rehabilitation Centres for the Disabled is a Non-Governmental Organisation currently made up of 53 associated bodies. The latter are private entities who undertake ongoing Job and Training Initiatives for the Disabled. As this is the area which FORMEM, for obvious reasons, knows best, information about its associates are more accurate and detailed. Without neglecting this aspect, for the purposes of this project we have followed a strategy involving the presentation of an inventory containing the contacts, methods and experience of our associates, wherever possible putting this data into the context of Portugal today and of the other organisations involved in Job Rehabilitation.

We have attached data on the background and a list of the institutions who are FORMEM associates with their respective phone and fax nos. and addresses.



2.13.2 *Overview of Organisational Frameworks for User Participation: Economic and Legal Frameworks*

2.13.2.1 **Legal Framework.**

The right to form non profit-making Private Social Welfare Institutions is set out in Chapter II of the Portuguese Constitution (no.3, article 63). At the State's request these institutions can take action connected with the accomplishment of social security objectives, namely support to the Disabled (article 71). The remit of this supervision is not clear but it excludes extreme forms of control so as to prevent these institutions from becoming directly or indirectly State-run organisations.

These institutions may be asked to act insofar as the rights and duties incumbent upon the Disabled under the constitution (with the exception of those who are clearly incapacitated in accordance with no.1 of article 71) at the time of the formulation of a national policy for the prevention and treatment, rehabilitation and integration of the Disabled giving assurances of their rights in practice (no.2 of article 71).

In accordance with article 16 of Law no.9 enacted on May 2 (Rehabilitation Act), it falls to the State to see to the coordination and cross-referencing of all sectorial policies, measures and initiatives in this area, it being incumbent upon the National Secretariat for the Rehabilitation and Integration of the Disabled to ensure these duties nationally and at EU, European and International level as a coordinating body *par excellence* of national Rehabilitation policy. The National Secretariat for the Rehabilitation and Integration of the Disabled (SNRIPD) is a body endowed with administrative autonomy and its own assets under the supervision of the Ministry for Labour and Welfare.

Executory decision no.56 enacted on December 31 1997 set out the hierarchical structure of the (SNRIPD) based on the principles laid down in the Constitution, the Rehabilitation Act and the Executory Decision of the Ministry for Social Security and Welfare (approved by Statute Law no. 35 enacted on May 2 1996).

As stated in no.2, article 1 of the said statute law, the SNRIPD is designed to see to the planning, coordination and development and implementation of national policy on the rehabilitation, insertion and integration of the disabled.



2.13.2.2 Regulatory Norms

Rehabilitation Act

The Rehabilitation and Integration of the Disabled Act was published on May 2 1989 with a view to ensuring the exercising of those rights set out in the Portuguese Constitution (article 71). This Law defines the basic principles underlying rehabilitation policy, specifically Vocational rehabilitation, and makes an appeal for the adoption of measures designed to enhance the capabilities of Job Training structures and expand specific Vocational rehabilitation structures.

The State serves as the main guarantee of putting rehabilitation policy into effect in conjunction with families and government organisations. It falls to the State to coordinate any measures taken to this end.

In this Law, special attention is given to action taken by private institutions and cooperatives for the Disabled as partners with a vested interest in the aims of rehabilitation policy. However, it also quite clearly sets out the principle whereby any initiatives of this type taken by these institutions are to be subordinated to the measures defined by the State in this area as a means of safeguarding the interests of the disabled.

In accordance with the provisions of the said Law, the job training and orientation policy is aimed at the exercising of an activity (job), with technical and financial incentives for professional integration being envisaged in line with Employment policy.

Outline law on Rehabilitation

Vocational rehabilitation involves two main aspects: the employment market which is sometimes reluctant to integrate the disabled and the disabled themselves with their own characteristics and habits. The main concern of all technical measures taken in this area is to strike a balance between these two aspects and detailed knowledge of the latter is thus required. By comparing this set of variables with the active participation of the disabled person himself/herself, his/her family and professionals in the Vocational rehabilitation field, we can come up with the professional project which is best suited to the individual concerned. This generally leads to four different standard solutions: Job Training; Sheltered Employment;



Employment on the normal job market; and self-employment. For each of these solutions the law sets out possible support.

The Outline Law on Rehabilitation (Ministry of Employment and Social Security, Statute Law no. 247/89) was published on August 5 1989 and is subject to the provisions of Executory decision 99/90. The latter decree laid down the technical and financial support scheme for those promoting Vocational rehabilitation Programmes for the disabled. The aid in question suggests a broad-based strategy aimed at decentralisation, in the sense that the disabled, cooperatives, private bodies, local authorities and public bodies are all going to benefit (though not public bodies belonging to the central administration). Under article 2 technical and financial aid will be provided to programmes in the following areas: job preparation, training, guidance and rehabilitation including all fields of employment: normal employment market, Sheltered employment and self-employment. Incentives are also envisaged for those employing the disabled.

It is incumbent upon the managing body of the *Integrate* Subprogramme - Measure 3 to carry out the technical aspects and teaching of initiatives. The IEFP (*Employment and Job Training Centre*) is to play a prominent role in managing the Training structures created as part of protocols. The cooperation arising from protocols bestows a more lasting and stable nature upon the aid granted, whilst with cooperation coming about as a result of agreements, the setting out of guidelines and priorities is limited in time.

Basically, in spite of the range of areas considered by the aid scheme system, the structure of the latter is based on the initiative of the promoters.

As we are looking at integration in the normal employment market, financial aid shall be provided to employers in the form of subsidies (removal of architectonic barriers, adaptation of the workplace, personal company host allowance, compensatory allowance) or bonuses (integration and merit). As regards self-employment, aid is directed at the Disabled in the form of subsidies or interest-free loans.

As far as Employment is concerned, aid to experimental Employment programmes have been envisaged.



Sheltered Employment

The Sheltered Employment Scheme was created to meet the difficulties faced by those disabled people who require special Employment conditions owing to the type and degree of their disability, to a delay in, or even non-existence of, Rehabilitation procedure, and, last but not least, to the obstacles deriving from social prejudices.

Vocational rehabilitation, Training and Employment organisations can create Sheltered employment Centres (CEP) in accordance with the stipulations of Statute Law 40/83 and 194/85 and Executory decision 37/85 and qualify for technical and financial aid for this purpose.

This system seeks to endow the Disabled with the same legal status as other employees and takes three forms: Sheltered employment Centres (CEPs), Enclaves in companies with several employees and, in special circumstances, at the home of the Disabled.

To qualify for the Sheltered employment Scheme, you need to be of legal working age, be registered with a job centre, have personal and socio-professional independence and average production capacity equal to or greater than 33% of the average capacity of a non-disabled employee in the same workpost.

Under article 4 of Statute Law 40/83 Sheltered employment Centres (CEP) shall, wherever possible, allow transition to the normal employment market. They shall ensure training to anyone meeting the above conditions as well as a contract of employment, thereby providing them with a stable job and status as an employee.

The creation of CEPs is not only dependent on the will of organisations as State backing is required to make them feasible; consequently, preliminary studies need to be carried out. Under article 7 of the aforementioned Statute Law, a certain number of minimum requirements need to be guaranteed, namely a Vocational rehabilitation team with appropriate technical support.

CEPs shall be organised and operate along corporate lines, with suitable adaptations being made on a case-by-case basis. However, no more than 25% of employees shall be non-disabled.

Aid for the creation, setting up and operation of the CEPs has been provided in the form of State subsidies and/or interest-free loans as well as some technical aid.



Financial aid for contracting purposes under the Sheltered employment Scheme - i.e. remunerations and Social Security contributions – includes the payment of productivity shortfalls by CEP employees.

It falls to the authorities to oversee any aid granted; it is also incumbent upon them to assess whether disabled job applicants meet the requirements of article 2, Statute Law 40/83. This assessment is initially carried out by a technical team and at a later stage by specific assessment units.

Under the terms of article 4 of Executory decision 37/85, the CEP employment procedure seems to take several months.

Another form of Sheltered employment besides the CEP is the Enclaves. Under the terms of their creation (article 1 of Statute Law 40/83) organisations for the Disabled cannot form Enclaves unless they are endowed with production or service structures operating without disabled employees. The law is unclear as regards the role of organisations in the formation of enclaves as compulsory regulations on enclaves have yet to be published.

The law also considers the possibility of creating disabled home employment distribution services when Sheltered employment activities are being carried out at such homes. Again, regulations have yet to be published in this regard.

On the whole it would be fair to say that the set of norms regulating Sheltered employment is inadequate for several reasons including its failure: to provide rules in the event of economic difficulties; to set out specific management and organisational conditions; to envisage aid for making improvements to facilities; and to include costs defrayed on teams in the employment-related area and in the field of technical aid (medical, social, psychological and educational).

EU regulations and how they affect Portuguese legislation.

EU bodies have shown concern about the integration of the Disabled into the normal employment market, having made recommendations in this area and making use of various means from employer-friendly legislation to innumerable financial incentives.

Various EU regulations have allowed EU Vocational rehabilitation guidelines to be followed, backed up by structural funds in the context of the Community Support



Frameworks I and II. These regulations came about in the wake of the EU «Horizon» Initiative published in the Official Journal of the European Communities no. C 327 dated December 29 1990.

It is in this context that the ESF-funded Operating Programme – Health and Social Integration – «Integrate» Subprogramme, measure 3 - is currently in operation.

Continued support comprises the application of various EU regulations, namely no.2081/93 and no.2084/83. These are compulsory laws which can be applied directly in EU member-states.

Nationally speaking, the guiding principles underlying aid scheme regulations are set out in a complex series of legal provisions, to wit:

- Statute Law 99/94 and Ruling no.394/94 regarding the hierarchical structure of management, monitoring, assessment and control of the implementation of the Community Support Framework II.
- Executory Decision 15/96 (legal regulations governing aid for Job Training and Integration in the context of the ESF), Legislative Act 701/94 (deadline for funding applications), Statute Law no. 242/88 (trainee status), Legislative Act no.53-A/96 and Legislative Acts 464/96 and 465/94 (Expenditure on trainees and trainers and staffing costs).
- Specific regulations on access to ESF aid drawn up by the body managing measure 3 (socio-economic integration of the Disabled) of the «INTEGRATE» Subprogramme – Economic and Social Integration of Disadvantaged Social Groups, part of the Operational Programme – Health and Social Integration.

In this way the principles of transparency are adhered to in the allocation of structural funds, in the financial control of those initiatives undertaken and in the assessment and monitoring thereof (comparing stated objectives with accomplished objectives).

As regards the regulations for access to ESF programmes, it should be pointed out that, legally speaking, no distinction is drawn between the potential promoters of those initiatives which are to benefit from funding: private non profit-making organisations, central and local administration bodies and IEFV Vocational



Rehabilitation or Training Centres managed directly and/or in which a stake is held are all accorded equal status.

The basic requirements to be met by the aforementioned bodies in order to formalise their application include trustworthiness, the ability to organise, appropriate human and material resources, the promotion of Training in accordance with their corporate objective and compliance with tax requirements. This serves to demonstrate that they are sufficiently autonomous to undertake the initiatives concerned irrespective of any funds they may apply for. Which seems to be contradictory when the application for supplementary aid has been made owing to organisational structural shortcomings and can be justified on the same grounds.

The application formalisation procedure is laborious and bureaucratic in view of the fact that it has to be repeated on an annual basis and by dint of the number of particulars required and the detail in which they have to be provided.

It is endeavoured to base the decision arrived at - in the wake of an analysis of the applications – on the general objectives of the outline programme, any such decision being made within one month prior to the commencement of the initiatives concerned. In view of the latter aspect, we can see the logic behind the pre-requisites demanded of the promoters.

Notification of acceptance of proposals shall be provided within 15 days after the decision has been communicated.

EEC Regulation 2084/93 sets out funding for a wide range of expenditure and the following types of costs qualify: rental, hire and repayments, costs defrayed on staff, trainees and the preparation and putting into effect of initiatives. The following costs do not qualify: the purchase of depreciable assets, bank charges, interest and other non-compulsory financial expenses and costs defrayed on staff.

However, costs must not only fall within a category of eligible items but are also subject to a financial audit carried out to assess whether they are reasonable - undertaken by the managing body (DAFSE – European Social Fund Affairs Authority) – and to other provisions in accordance with Legislative Act 464/94



(trainee costs), Legislative Act 465/94 (staffing costs) and Legislative Act 53-A/96 (eligible costs defrayed on trainees and trainers who qualify for ESF funding).

This set of provisions stipulates sanctions to be imposed on promoting organisations who fail to comply; however, it does not envisage any penalisation of the managing body as this is already quite clear from the requirement to comply with agreed deadlines.

2.13.4 *Institutions, Organisations and Agents involved in Vocational Rehabilitation of the Disabled*

2.13.3.1 Background of Social Welfare Organisations.

For the vast majority of Social Welfare Organisations, the CRP (Vocational Rehabilitation Centre) is just one of many facilities on offer. For this reason, the problems connected with these units only constitute part of the various obstacles facing these organisations.

The majority of these organisations were formed on educational grounds. This explains why the State school model – particularly small-scale schools – has been used as a standard, having consequently been adopted by the said organisations.

Operating rules were defined in this way from the very outset; however, adjustments needed to be made to the style of teaching as regards the education of disabled children as this was an area which the adopted model failed to cater for.

To maintain these organisations, technical and administrative capabilities were required so as to overcome operating shortcomings deriving from the shortfall in State funding. To meet these difficulties, it was sought to raise funds through public appeals and by arranging subsidies in cash or kind from public/private bodies.

National and EU progress in social policies gave rise to structural changes in these organisations.

The development of the basic, integrated school model to insert the target population of these organisations, was to make the model originally adopted obsolete. However, these organisations became the focal point for all those whose needs were not being met by this school: severely disabled young people and adults and those who had, in the meantime, become too old to frequent Basic Compulsory Schooling.



These changes led to a perceived need for implementing an internally differentiated model which would allow intervention in various areas, thereby catering for disabled people of all ages and whenever possible. This was a matter of survival for the organisations themselves as in this way they would keep State funding, whilst proving more helpful to their users.

These organisations are financially dependent on the State to a large extent which can be put down to the fact that they are not recognised as service providers capable of putting a value on these same services, this generally being defined by the competent authorities. Besides this financial dependence, in the majority of cases there is also hierarchical dependence as the relevant authorities - as promoters of aid programmes for the Disabled – set out internal operating rules which serve as control mechanisms for the organisations.

The downside of this situation is that the specific individual needs of each organisation are ignored, meaning that the choices made are not always the most logical ones in terms of rational management.

According to available data, 18 centres (55%) were formed between 1989 and 1995 with 15 centres (45%) having existed prior to 1989. This growth can be put down to the favourable conditions for institutions and legislation (cf. 1. Legal Framework). The pressure exerted by the families of the Disabled, the heightening of public awareness of the problem of the Integration and Rehabilitation of the Disabled as well as the pressure exerted by the authorities through the creation of Training units nationwide were all contributory factors to this drive to construct CRPs and/or create Vocational Training units in the various organisations.

A recent article published by the IEFP¹, besides referring to the existence of a large number of these structures, also pointed out the shortfall in these centres in some regions of Portugal as has been illustrated here in table 1.

We can get a better idea of the size of this shortfall by comparing this information with IEFP data on the number of disabled people per district in 1994 (cf. attached table).

¹ «Employing the disabled» by Manuel Moura Fernandes in the magazine «Integrate», no.13, May/August 1997 (5-13).



	No. of bodies
North	16
Centre	33
Lisbon	42
Alentejo	14
Algarve	9
Total	114

Table 1

2.13.3.2 Legal and Economic Nature of Vocational Rehabilitation Centres

At present there is no general, systematic organisational report available on social welfare organisations or, to be precise, on organisations operating in the field of Vocational Training and Rehabilitation. From the very outset, any survey attempted in this area is complicated by the wide-ranging nature of these organisations who, for reasons of practicality, we will call Vocational Rehabilitation Centres (CRP). In fact, although these Vocational Rehabilitation Centres appear to be similar on the surface, they are actually quite distinct.

Firstly, a distinction can be made between those organisations working exclusively in the field of Vocational Rehabilitation and Training - who are in a minority – and a larger group of organisations for whom the Training and Rehabilitation unit is just one of many aspects.

These organisations, in which the Vocational Rehabilitation Centres are integrated, are not companies but social welfare organisations as their objective consists of the rendering of services to the community. Hence their classification, in general parlance, as non profit-making organisations; this does not mean no profit is made but simply that profit is not their main concern.

Two types of activity can be classified in this type of organisation:

- activities generating direct results of an industrial, commercial and agricultural nature which can be clearly differentiated between and are quantifiable;
- those activities where it is not possible to put a value on the economic benefit obtained since the economic activity concerned is justifiable on purely social grounds: revenue is sought for investment in factors (expenditure).



The data **FORMEM** obtained from the study commissioned to researchers from the University of the Minho demonstrates that these organisations' resources derive in virtually their entirety from sources other than the sale of goods and services, i.e. subsidies.

Of the 46 Vocational Rehabilitation Centres studied, 33 provided information about income for 1994, made up of 23 Cooperatives, 9 organisations with status as Social Welfare Organisations and Entities Equivalent to Corporate Bodies.

Of the 33 Vocational Rehabilitation Centres, 48.5% said they worked according to a memorandum of understanding signed with the Vocational Employment and Training Institute. Only 33.3% did not operate along these lines with 18.2% failing to provide an answer in this regard.

This data is intended to provide a general idea about the economic and legal nature of Vocational Rehabilitation Centres in Portugal. Since the FORTUNE project requires the identification of the institutions, organisations and agents involved in vocational rehabilitation, **FORMEM** and its associates also need to identify themselves. To this end, since the desire has been expressed to list the names and addresses of institutions and other agents featuring in the inventory, we have enclosed a list of those bodies who are our associates.

2.13.3.3 General characteristics of the CRP

Premises and number of professionals

The data submitted by the team of researchers from the University of the Minho provides information on the ownership of premises where the CRP are in operation, their localisation in terms of their accessibility and the number of professionals they employ.

Hence, over half of the premises belong to the organisations themselves (64%) with remainder being granted by the IEF (24%) and other institutions (12%).

As regards the localisation of the CRP, the vast majority of their managers (79%) believe their premises are in strategic locations, with 18% believing the location of the premises to be peripheral with the difficulties of access to public transport.



As regards human resources, average headcount at CRP is 16-30 professionals and 11 have an equal number or less than 15 professionals.

The organisational structure of the CRP

As has already been mentioned, the majority of CRP are part of multipurpose organisations of varying importance. In this regard, managers believe the organisational structure to be suitable but 12% are of the opinion that it should be more balanced or with greater inter-functional autonomy. As regards the proportion of CRP employees, this varies between 12% of total permanent staff to 64%.

The importance of the CRP varies greatly from organisation to organisation but the data submitted by the researchers from the University of the Minho demonstrate that the majority of these centres coexist with other functions without playing a prominent role; i.e. their importance is relative in terms of the organisation as a whole.

Almost all CRP are endowed with a training structure, implementing courses based on training schemes and adapted to trainees' individual needs.

2.13.3.4 CRP human resources

Recruiting professionals

The recruiting procedure entails the public advertisement of posts, with the relocating of staff from other areas also a frequent occurrence.

Great store is set by previous professional experience (study data indicates a figure of 72%). With regard to senior staff, lecturers and administrative staff, their previous work experience is very similar to the activity undertaken at the centres. This similarity is more negligible as far as general service staff, coordinators and monitors are concerned.

Whether or not there is any similarity with their previous posts, professional staff make full use of the know-how they have acquired whilst carrying out other assignments in line with their current functional needs; however, they are always faced with a relearning process when asked to perform new duties.



The CRP professional structure

In terms of age structure, the CRP have a very young corps of professionals. Over half are aged between 19 and 36, and 75% of the total are aged 42 or under.

In terms of gender distribution, 63% of total CRP members are female, i.e. 2 in 3.

A further feature of the CRP is the wide variety of professional categories which can be grouped into 9 distinct areas:

- - General service staff;
- - Administrative staff;
- - Monitors;
- - In-house training technical monitoring staff (TAFE);
- - Lecturers;
- - Paramedics;
- - Senior technical staff;
- - Coordinators.

In terms of distribution of permanent staff by professional group, the percentage of monitors (38%) as a proportion of all groups is worthy of particular mention.

Creating professional categories whose name serves to describe the duties actually carried out by CRP employees is difficult in view of the wide variety of designations involved. This is a clear demonstration of the lack of articles of association and professional careers. What happens is that each professional gives his activity the name he deems to be most appropriate in view of what his/her job actually involves.

Also worthy of note is the information on the level of education of CRP professionals. A major percentage of professionals are highly educated. The majority have a supplementary level of education (23%), 18% have secondary school education, 16% have a degree and 15% have a 3-year bachelor's degree course. The sum total of individuals with lower levels of education, namely primary/middle school education, amounts to 22%. This data is inextricably bound up with the age



structure of our target area. In fact, if cross-reference the data, it becomes clear that the older the professional is, the less well-educated he/she generally is.

By contrasting levels of qualifications with professional categories, it can be observed that senior technical staff and coordinators are the most highly qualified staff, at the opposite end of the scale from general service staff.

Another interesting data item is that concerning the rate of seniority which reveals that over 50% of professionals have been with the CRP concerned for less than 4 years whilst professionals with over 10 years' service number a mere 8%, fitting in with age patterns for CRP professionals. It should be noted that there has been a drive to recruit new professionals in recent years.

We can also add that professional groups who have been with the organisation for shorter time periods (5 years or less) are, in the main, senior technical staff (87%), in-house training technical monitoring staff and paramedics (both 69%) and coordinators (50%).

As regards position, there is great professional stability, one of the most marked characteristics of those CRP looked at here. In the last 4 years alone, there have been increasing signs of employment instability in that new employees have been admitted on short-term contracts.

However, this job instability is not generally true of all organisations and all professionals.

Administrative staff, general service staff and monitors enjoy the most stable contracts of employment, with senior service staff, in-house training technical monitoring staff, paramedics and lecturers (on secondment) who are most at risk.

There is a growing degree of professionalisation of existing technical staff. Volunteers account for a minor proportion of total staff (3%), reflecting the high degree of professionalisation of CRP's human resources.

Profile of CRP managers

Management posts are held by partners, technical staff and parents. Distribution by categories reveals that partners go to make up the greatest number of management posts, almost as many as technical staff, with parents accounting for a lesser number.



If we look at data on the characteristics of the chairmen surveyed, 37.5% are partners, 28.1% are technical staff and 25% are parents. This is the same order as for the categories of vice-chairman and secretary, although, self-evidently, in different proportions.

This leads us to conclude that parents are progressively leaving management posts, which are being taken up by technical staff. The upward trend in technical staff holding management posts is borne out by data provided by the University of the Minho for the period 1991-1996: 78% of technical staff were elected as chairmen, with 7 in 10 technical staff having under 5 years management experience in 1996.

As regards levels of education, it can be observed that managers are endowed with academic qualifications above the average for CRP professionals.

Table II illustrates how levels of education are distributed by management post.

Distribution of qualifications by management posts.

	Chairman	Vice-chairman	1 st Secretary	2 nd Secretary	Treasurer
Primary	6.4	6.9	-	12.5	10.0
Middle school	-	3.5	3.5	-	3.3
Secondary	16.1	10.3	10.3	8.0	10.0
Supplementary	16.1	3.5	17.2	12.0	13.3
Bachelor's degree	25.8	13.8	27.6	16.0	33.3
Degree	22.6	51.7	31.0	32.0	16.7
N/R	12.9	10.3	10.3	20.0	13.3

Table II

A trend accompanying the admission of more highly educated people into management posts is the reduction in the age of chairmen of the board, following the recent influx of technical staff into these posts.

The average age for a technical chairman is 41 compared with 51 for a non-technical chairman.



2.13.4 *Rehabilitation of the Disabled - Methods and Pilot Schemes*

2.13.4.1 **Overview of Rehabilitation of the Disabled in Portugal**

To achieve the Rehabilitation of a Disabled Person, it is vital that the latter be involved in a productive activity; and the importance of professional integration for social integration - besides being essential for economic independence - can never be stressed enough.

Recent literature on this area² points towards the fact that the growing importance of work in modern societies makes the consequences of the inability to do so all the more serious.

Rehabilitation will only succeed if it manages to provide the disabled person with a more independent and productive life.

In line with Employment policies, vocational training serves a dual purpose. Firstly, it deals with the integration of young people in the employment market and the reinsertion of the long-term unemployed (reduction in unemployment); secondly, it ensures an enhancement of the importance of human resources in an attempt to boost competitiveness, particularly with a view to facilitating the publicising and assimilation of new technologies.

Strictly speaking, we can say that these Vocational Training Programmes are primarily and ultimately aimed at «providing young people and adults with the know-how, capabilities and skills they need to get a job, to keep it and to achieve professional advancement³.»

When drawing up regulations and articles of association the emphasis is on the arrangement of individual Training/Education plans, providing the disabled person with access to less restrictive means of Training and Education for Employment purposes.

² Vd. Schneider & Ferritor (1982).

³ Vd. A.Charana «Managing programmes for pre-job preparation, training and employment» in Employment and Training, 5, 1988 (63-74).



Historically speaking, the Training system has undergone the same academic changes that have affected the school system. Nóvoa⁴ identifies three main movements for contesting the school model.

The first is called New Education and was at its height in the 20's, endeavouring to call into question the school model. This movement believed in student-focused education with the emphasis on «learning to learn.»

The second movement arose in the wake of the social crisis which occurred in the sixties and goes by the name of Ongoing Education. As the name suggests, this movement stresses the need to constantly update knowledge and hence the importance of ongoing Training. This movement led to the development of new techniques and teaching aids in the Training area.

A third movement is currently in vogue which seeks a new Training model whose outline has not yet become clear. Based on studies of life histories and biographical methods in adults, the idea emerges that the person trains himself/herself, this process being the product of the understanding that the individual has of his/her own life.

Training Centres for the Disabled are currently at the «second movement» stage: by meeting the individual requirements of the disabled, Training activities with close links to local business and industry are the order of the day, and the progress made in the trainee's performance allow him/her to carry out increasingly difficult tasks.

However, it should be borne in mind that Training is not restricted to the devising of tools and effective techniques for conveying the content of a particular programme. A useful definition of Training is provided by Dominicé⁵. According to the latter, Training is similar to a «process of socialisation during the course of which family, school and professional contexts constitute places for regulating specific procedures which become intertwined, providing an original form to each life history.»

⁴ A.Nóvoa & M.Finger (Eds); *The (Auto) Biographic Method and Training*; Ministry of Health, Lisbon, 1988;

⁵ Cf. P. Dominicé, «Methods of drafting and processing the educational biography. Biographical approaches to training», *Education Science Department Records*, 8, 1984 (p.60)



Professional Rehabilitation is regarded as being an all-embracing process and in this sense differs from the traditional role of education as practised by a normal or special school where user participation is more dependent and the latter's role more passive. In Vocational Training the trainee plays a more active part as Vocational Rehabilitation necessarily involves a productive lifestyle where work plays a pivotal role.

It is at the CRP that young people and disabled adults acquire new knowledge and skills. Empirical studies (Seifert, 1989, p.144) identify three problem areas in this context: the vocational option⁶, adjustment to Training and Employment and social adjustment.

The most recent line of research - into the Vocational Rehabilitation of the Disabled – tackles the acquisition and modification of skills in the context of Sheltered Employment and the CRP (Rusch, Schutz & Heal, 1983, p.455-456).

As regards those factors on which the success or failure of adjustment to Training and Employment depends, there is data available which would seem to indicate that such factors have more to do with the personal, interpersonal and social characteristics surrounding the disabled individual than with the latter's ability to carry out tasks.

Rusch, Schutz & Heal (1983) argue that the progress made in the area of Rehabilitation has come about as the result of good Training and Employment practices as regards the absorption of professional and psychosocial behaviour both in the context of Vocational Training as well as in the context of different types of Employment (competitive and sheltered).

In Portugal, as elsewhere, a flexible system was introduced with the twofold aim of cutting initial Training costs and increasing the effectiveness of the latter. This system comprised three Training practices: Centre Training (simulated Training), alternating Training (Training Centre and company) and on-the-job Training (company). It is designed to meet the Training needs of the mental and physically handicapped in Portugal. The table below illustrates population distribution by type

⁶ In this regard vd. Adelaide Claudino – *The orientation of young people with mental handicaps to Vocational Training*; National Secretariat for the Rehabilitation and Integration of the disabled.



of Disability in Mainland Portugal and based on estimates in line with 1991 census figures.

Population Distribution by type of Disability in Mainland Portugal

Disability	Disabled population (number)	Disabled population (%)
Physical (motor and skeletal deformation)	318 840	43.2
Mental	117,260	15.9
Visual	104,100	14.1
Hearing	101,100	13.7
Organic	59,800	8.1
Associated	36,900	5.0
Total	738,000	100.0

Table III

An analysis of the above data demonstrates that the second largest percentage relates to individuals suffering from mental handicaps, though no data is available on the classification of disabilities used here, nor as to distribution by gender or age group.

As regards the population covered by Vocational Rehabilitation for the period 1987-1994 for Portugal as a whole, it should be stressed that this figure stood at 493 people in 1993 (in vocational and assessment initiatives) with an estimated 650 people in 1994 (data as yet unconfirmed).

As far as Vocational Training is concerned, 4511 people were affected in 1993. This figure is set to rise to 4813 in 1994.

With regard to the type of disability targeted by these initiatives, the reference document drafted by the IEFP in 1994 does not provide any information.

In Portugal, those organisations specifically dealing with mentally handicapped and working in Vocational Guidance and Training are greater in number than those focusing on other types of Disability. One reason for this is probably the fact that this group is experiencing more problems achieving social integration and equality of opportunity.

The 70's saw the movement to create the CRECI (Education Cooperatives and the rehabilitation of Maladapted Children).



In the 80's the adoption of a new concept in rehabilitation policy – set out in the Outline Law on Rehabilitation (Ministry of Employment and Social Security, Statute Law no.247 enacted on August 5 1989) – permitted the construction of Training Centres and a large-scale increase Vocational Training programmes. In this particularly favourable context, in no small measure owing to the financial aid provided by the ESF, the creation of new Mentally Handicapped user services also underwent major development. As mentioned in the first part of the present document, the Government took on the lion's share of responsibility as regards the provision of technical and financial aid to programmes aimed at the professional integration of the Disabled.

Structurally speaking, the Portuguese Vocational Training in Rehabilitation system does not a rigid format and, as a rule, follows a personalised plan of action tailored to suit individual trainee needs. Course duration is thus dependent on this factor with the level of operation achieved at any time between the first and fourth year of training.

The three major moments of the Vocational Training process are: orientation/adaptation to a Vocational Training course; qualification; and specialisation.

Stage one lasts no longer than one year and involves an initial look at the selected area/course at the end of which period the trainee shall be capable of carrying out simple tasks in his/her chosen field.

Stage two is the longest stage (maximum duration: two years) and involves the acquiring and assimilation of specific contents for a profession with the trainee being capable of maintaining and developing the techniques and knowledge gained at stage one at the end of the first year. At the end of the second year the trainee should be equipped with more specific knowledge and techniques about more complex tasks.

The final stage consists of consolidation and may last one year. At the end the trainee is expected to be able to carry out the specific operations required by his/her workpost.

The courses at each CRP are either the result of empirical knowledge of the employment market of the region where they are located or a survey of the needs of the said market.



Training programme methodology shall follow the guidelines set out by the technical staff in charge of the CRP.

Different Training techniques shall be used at the vocational qualification stage, these varying from CRP to CRP, but which can be used simultaneously in the context of practical Training.

These techniques relate to: simulated practical Training, i.e. Training carried out under the guidance of a trainer; on-the-job Training supervised by an in-house employee who shall be called the tutor; and alternating Training which involves a combination of simulated practice and actual practice.

In addition to practical Training, trainees shall receive theoretical Training. Within this context we can distinguish between behavioural Training aimed at the personal development of individuals; and scientific/technological Training which is more concerned with acquiring the knowledge required to carry out a particular occupation.

The prior qualifications required will depend on the level of final professional qualifications, though in the majority of cases no pre-requisites of this kind are asked for.

Agewise, individuals are required to have achieved compulsory basic schooling in order to get onto a Vocational Training programme.

2.13.4.2 Training and Employment at the CRPs: the experience of our associates.

As we have already mentioned, the vast majority of CRPs provide their users with Training courses. Training is given in accordance with an individually tailored plan following attempts at vocational screening.

The individual Training plan is part of a general Training scheme which sets out operational objectives for each area in the implementation/acquiring by trainees of a range of tasks and procedures. In view of the difficulties faced by some of the latter, one or more tasks or procedures are chosen and this constitutes the so-called individual Training plan.

Mental Handicap is the main type of disability encountered at centres run by FORMEM's associates as can be seen in Table IV below:



Distribution of Trainees by type of Disability

Type of Disability	%
Mental	59.5
Motor	18.4
Visual	4.8
Hearing	3.5
Organic	0.7
Multiple disabilities	6.2
Mental illness	2.7
Others	4.2

Table IV

It thus becomes clear that the issue of trainee selection is extremely relevant here. The problem faced by CRP managers is whether, on the one hand, they should follow a principle-based strategy in which case they should «wipe the slate clean» as regards certain trainee characteristics constituting key success factors for his/her professional integration (independence, a certain degree of productive capacity, some behavioural stability) or whether, on the other hand, they should adopt a pragmatic stance according to which only trainee applicants able to find and hold down a job will be selected.

Initially, particular attention was paid to the age of the trainee applicant unless the latter suffers from an extremely serious Disability. There are no pre-determined criteria common to all CRPs as such criteria are defined by CRP management, coordinators and senior technical staff (usually psychologists). Usually, no attention is paid to the opinion of the monitors as to the trainee applicants' ability to carry out tasks specifically inherent in the area of Training to be given.

In any case, generalisations cannot be made here as there are great differences between the various CRP and even between the courses held at the CRPs.

It is also the question of eligibility which poses an problem as regards the placement of trainees in training posts. In view of the difficulties encountered in finding businessmen open to the idea of offering a placement to this sector of the population, unsuccessful placements cause serious damage; hence, great care must be taken in selecting trainees.

Despite the existence of these problems, the CRPs are still employing trainees with characteristics which constitute serious difficulties to their professional integration,



following the principle of «equal opportunities» and constantly seeking to provide solutions which envisage their integration into the employment market.

62 different courses were identified in the said study, embracing the following fields of activity: carpentry, locksmiths, civil construction, textiles, graphic design, the hotel business, laundries, gardening, agro-fisheries etc.

Training has two features which serve to complement each other: a theoretical aspect involving the acquiring/applying of information of a socio-cultural, scientific and technological nature; and a practical aspect designed to focus on the acquiring and development of vocational skills.

Theoretical Training is given in a classroom under the guidance of a trainer. Practical Training can take the form of simulation (at the CRP's), at the workplace (on-the-job) or alternating system.

The Training given at our associates' centres takes the form of alternating Training. There has been a growth in the practice of on-the-job Training and a corresponding reduction in simulated Training.

This growth serves as a good indicator of the effectiveness of this type of Training and also suggests a trend towards the deinstitutionalisation of Training.

It should be stressed that although Training the Disabled has traditionally been more linked to the area of know-how – closely connected with the development of work skills – interpersonal skills have begun to play a more prominent role, i.e. training psycho-social skills. This follows in the steps of the Humanist theories set out by Carl Rogers, the author of *Becoming a Person*. Without a shadow of a doubt this interest is not unconnected with the fact that this theory allows the creation of better conditions for successful integration, not only professionally but also socially (despite the fact that one thing follows on from the other).

One of FORMEM's associate institutions, CERCIFAF, announced an outstanding rate of integration, 81% of a total of 125 trainees, the majority of whom were mentally handicapped, and who benefited from its Training programmes between 1988 and late 1996.

Its managers are convinced that the *raison d'être* behind this success is «unbending compliance» with three guiding principles, to wit: maintaining and building up empathy with the local community; correct sizing; and an emphasis on personalised



treatment allowing the individual analysis of methodologies «so as to provide as much training in citizenship as possible».

Intervention in the field of personal Training serves to cement technical/scientific knowledge connected with the development of vocational skills. The CERCIFAF managers go on to say that «even if we are familiar with the state of the labour market, this will be of no use if we fail to focus our action on the personal training and the set of attitudes (work rates and habits, behaviour and interpersonal relations) required by a job.»⁷

As regards those issues looked at for the opening of Vocational Training courses, the data gathered in the study we have been referring to points towards a consensus concerning the importance of two factors: prospects for getting trainees employment in the employment market, the skills expected of trainees and the organisations' own resources.

Prospects for Employment in the job market are presented as the no.1 factor, acknowledging the actual value of a Job as a method *par excellence* of identifying the individual in our socio-cultural milieu, the source of his/her autonomy and his/her personal fulfilment. In this sense, professional integration is regarded as a strategy for facilitating *social* integration and the personal development of the individual.

This becomes self-evident with regard to the Mentally Handicapped; for the latter, entering the employment market involves their Rehabilitation as people to make an even greater conquest: winning back their self-esteem.

IEFP data on the number of people who have benefited from employment aid and incentive schemes in the normal job market is indicative of the growing recognition of the abilities of the Disabled: 62% have achieved professional integration, having signed long-term contracts (Integration Bonus) as can be observed in the table below.

⁷ Cf. «Integration is possible...» by Belarmino Costa, José Luís Ribeiro et al., «Integrate» no. 13, May/August 1997 (52-59).



	No. Of People Covered	Creation of Workposts	%
1990	177	52	29%
1991	340	201	59%
1992	372	247	66%
1993	487	297	61%
1994	401	264	66%
1995	453	289	64%
1996	503	348	69%
Total	2,733	1,698	62%

Table V

However, although financial incentives have been cited in some cases as being one of the factors enabling integration, they are not regarded as vital, neither does the maintenance of the workpost seem to be dependent on its continuity. The good results achieved by these employees are the best incentive and most effective means of promoting such workers to employers. However, they need to be given a chance and, as chances are few and far between, such financial aid is vital as it constitutes the means whereby employers can get to know the potential of these people.

2.13.4.3 Summary of some trials/ideas

There has been a tendency in the Rehabilitation area in Portugal towards on-the-job Training in addition to Personal Training at the CRPs.

The issue of pre- and post-contracting is also under discussion and, in this context, the role of the Integrating Agent, sometimes called the Job Mediator. Post-contracting monitoring is a recent concern arising out of the difficulties experienced by the Disabled in holding jobs down after Training and Integration. This debate raises many issues and a consensus is a long way away as it sets different models and concepts in the field of Rehabilitation/Training of the Disabled against each other.

The data published by our associate CERCIFAF in the aforementioned article provide a brief statement of their stance on these matters. Hence, the following points should be stressed:

- The CRP Training Structure has to place its faith in Personal Training.
- Personal Training can only be learnt through major experiences and not in the form of theoretical, pre-defined theories laid down by law. There is no room



for «quitters» in this process: all the agents involved in it, and particularly the trainers, are responsible for its success.

- Centre Training shall keep as closely as possible to real life situations in order to make the move to the company a success.
- On-the-job Training is the calling card of the disabled trainee and a basic condition for his/her employment as it allows recognition of his/her value.
- In order to promote aid to integration, empathy should be built up with the company and the surrounding community through a personalised relationship with businessmen, company employees, family and other social agents.
- Seeking to become familiar with the surroundings by meeting up with businessmen, publicising the CRPs and to those who work there; in brief: demonstrating what the CRPs are, what they have and what they do so as to lend credibility to their work.
- A climate of confidence in integration should be created: «confidence is linked to empathy and is based on credibility.» This can be achieved by defending company and trainee interests on an equal footing.
- Monitoring should be provided during Training and after employment.
- During on-the-job Training attention should be paid to any signs that the trainee has yet to assure his/her workpost. Action should be taken with a view to making the trainee effective and indispensable in those tasks for which he/she is responsible.
- When monitoring, a high profile is not required but rather compromise, allowing the company to form and adjust the profile of the trainee to the post he/she may fill. It falls to those responsible for monitoring to play the part of facilitators: «being there, supervising and not disrupting.»
- Pre and post employment monitoring shall be assured, thereby making the parties concerned feel secure.



The development of projects in the fields of information and communication technologies has also come to the fore in view of the fact that their day-to-day advantages for the disabled and the elderly are significant (from toys to the potential of telecommuting).

In this context, our associate CERCIAV is aiming to put into effect a multimedia system for Educating and Rehabilitating the Seriously Mentally Handicapped. «Multimedia Space» (EMA) aims to develop the sensory capabilities of the seriously Mentally Handicapped and to create a recreational facility for them using multimedia equipment with recreational and educational features. This initiative constitutes stage one in a broader, more ambitious project which this body hopes to promote: the ECO Project – Space for the Seriously Mentally Handicapped and their families to Socialise. The EMA project will lead to prototype equipment which can be installed at other institutions upon its approval.

Another interesting initiative, unprecedented in Portugal and Europe, was the creation of a group of companies run by the Disabled (called Social Companies) to provide services to the community. This group, comprising 5 shops which are all run by People suffering from Mental and Motor Disabilities, is located in Alcaide, Cascais and was opened on March 8 this year. The project has received support from Cascais Council, the ERDF, the community programmes Horizon, Creatif and Integrar and from some anonymous businessmen. The initiative was devised by the chairman of the Portuguese Association for the Disabled in Cascais, Manuel Casanova. The director of the Alcoitão Rehabilitation Centre, Rico Calado, took on responsibility for the monitoring the project and for selecting 12 individuals to run the establishments who received Training at the aforementioned Centre.

The five establishments are: a café, a cobblers, a stationers, a physiotherapy centre and a laundry. The managing partners of each establishment will receive a small monthly retainer from the Alcoitão Centre until they begin to make a profit. They will also receive support from monitors and psychologists.

This experiment constitutes a risk in view of the fact that it has never been tested before in any other country and it is not known how it will work out.



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