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PROMOTING SMART SPECIALIZATION ORIENTED ADULT LEARNING PATHWAYS IN SMALL AND MEDIUM ENTERPRISES (PULSE)

Summary of

Methodology for integration of
adult education into personnel
development measures of smart
specialization-oriented SMEs

Project number
2020

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Introduction

Project PULSE (Erasmus+, Promoting smart specialization oriented adult learning pathways in small and medium enterprises) has been developed with the overall objective **to develop innovative, high-quality, flexible adult learning pathways for smart specialization oriented SMEs** (further in text SSO SME's). Specific objectives include the identification of new patterns, how to cover a gap of knowledgeable and skilled human resources, development of high-quality, flexible approaches for unlocking potential of the available human resources, fostering implementation of new human resources management patterns and approaches in SSO SMEs and encouragement of integration of new adult education provision approaches into human resources management patterns.

Participants of the project are: adult education developers and providers, human resources development specialists in SSO SMEs, participants of stakeholders' groups (e.g. public institutions responsible for education guidance and counselling, education quality assurance, employers' associations, trade unions, adult education associations etc.)

The core activities of the project are an elaboration of the intellectual outputs - **Methodology for integration of adult education into personnel development measures of SSO SMEs and Guidelines on the application of the methodology** (see the process in Figure 1.)

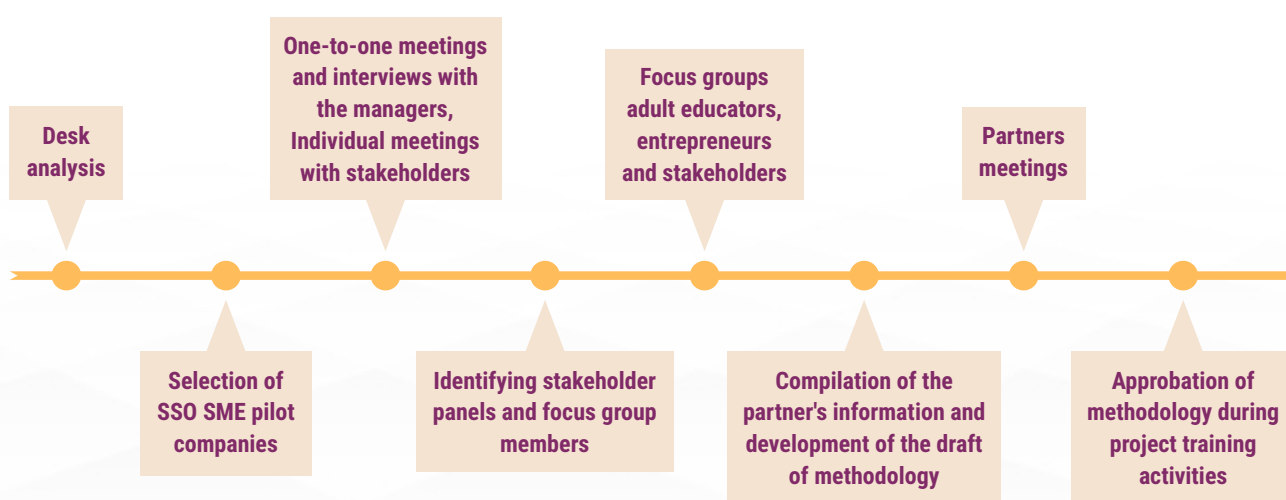


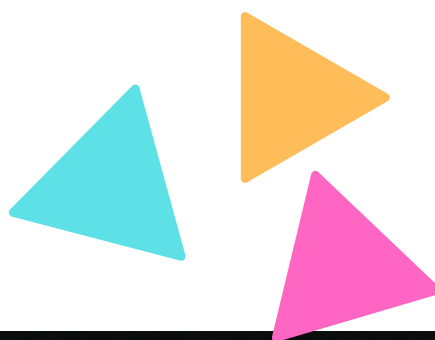
Figure 1. *Elaboration and approbation process of methodology for integration of adult education into personnel development measures of SSO SMEs*

The methodology for integration of adult education into personnel development measures of SSO SMEs has been developed within a PULSE project with the aim to solve existing HR challenges for the SMEs. During the project initial stage several HR strategic day-to-day management tools for SSO SMEs, adult educators and other stakeholders were selected. In the following stages tools will be tested and guidelines for usage and implementation of above mentioned target groups will be elaborated.

The Summary of Methodology for integration of adult education into personnel development measures of SSO SMEs will be used for piloting the training program designed in project PULSE as rational and compact information source about the selected HR strategic day-to-day management tools for SSO SMEs, adult educators and other stakeholders.

The methodology and following summary has been developed by the project PULSE partners: Vidzeme planning region (Latvia), Siauliai Chamber of Commerce, Industry and Crafts (Lithuania), Volkshochschule im Landkreis Cham e.V. (Germany), Chamber of Commerce, Industry and Shipping of Seville (Spain), JAMK University of Applied Sciences (Finland) and Estonian Education Forum (Estonia).

Methodology (full text) is available [here](#).



PULSE



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Key concepts

Smart specialization orientation (SSO) - an innovation policy concept that aims to boost regional or national innovation, contributing to growth and prosperity by helping and enabling regions/countries to focus on their strengths. Smart Specialization is based on partnerships between businesses, public entities, and knowledge institutions.

Small and medium size enterprise (SME) - Small and medium-sized enterprises (SMEs) are non-subsidiary, independent firms where the number of employees is less than 250 employees.

Knowledge - understanding of or information about a subject that you get by experience or study, either known by one person or by people generally.

Skill - the ability to do something well; expertise. All skills can be categorized in groups of **cognitive and non-cognitive skills**. **Non-cognitive skills** cover a range of abilities such as conscientiousness, perseverance, and teamwork. These skills are critically important to achieve. They form a critical piece of workers' skill sets, which comprise cognitive, non-cognitive and job-specific skills. **Cognitive skills** - the core skills used to think, read, learn, remember, reason, and pay attention.

Competence - ability to apply learning outcomes (knowledge and skills) adequately in a defined context (education, work, personal or professional development). The competencies include knowledge, skills and attitudes.

Adult education - in this document, the concept is used in the context of lifelong learning and describes adult formal, non-formal general and vocational education at all levels and types of educational institutions, as well as informal learning.

Adult educator - is the person (or organization) that practices facilitating the learning of adults by applying the principles of adult pedagogy. The broader terms as a trainer or expert is sometimes used for an adult educator when listing job categories. In the context of this document adult educator can be from inside of the organization or outside of the organization.

Strategic Human Resource Management (SHRM) - is the practice of recruiting, developing, rewarding, and retaining employees for the advantage of the employees as individuals and the organization as a whole. In strategic human resource management, the human resources play a vital role as a strategic partner when company policies are created and implemented. Strategic Human Resource Management is a preference for development of relevant organizational culture, enhancement of business performance through innovation and competitive advantage.

Dual Vocational and Educational Trainings (VET) - dual vocational education and training systems stand out due to the two learning venues company and vocational school. They are well acknowledged in Europe and established for example in Germany.

Information and Communication Technology (ICT) - technologies that provide access to information through telecommunications focuses primarily on communication technologies. This includes the Internet, wireless networks, cell phones, and other communication mediums.

1. Situation, challenges, arguments

SSO SMEs are working in rapidly changing times (see Figure 2.), when everything is dynamic, and change is the only constant. The business environment is challenging, and the company needs to take governance and risk issues seriously to adapt and prepare for these challenges. One of the main challenges for SSO SMEs, among countless others, is to create and maintain a culture of staff learning and creativity in the company in order to make the most of its resources for the company's growth.

An SME may not need full-time human resources or recruiting, but in times of peak growth, the key to a sustainable future is finding the right people and developing the right skills and competencies. As technologies change rapidly companies must innovate or be left behind, it means, that employers may need new kind of thinking, view, orientation, methods, tools.

Over the last 50 years, human resource management and development have received priority and growing attention, both globally and in the EU. In large companies, human resource management policy is relevant to companies' values and strategies. The process of management includes long-term and short-term planning in all top level areas, including human resource management, monitoring their implementation as a common practice. However, existing human resource management in large companies' development practices and experience, is unfortunately not easy to implement and integrate into SSO SMEs, especially with less than 50 employees. Given the role of these enterprises in economic development, it is worth looking into and looking for opportunities to address the problem not only within SSO SMEs themselves, but also to explore situation in context of adult education professionals and institutions, as well as other stakeholders.

There are a significant number of methodologies and tool to empower SMEs with human resource development tools, that concentrating not only on knowledge and skills in a specific field, but also on the capacity of SMEs to up-skill and empower their current and planned in the future human resources. Some of methodologies and tools are targeted catch challenges and opportunities. To work in trans-disciplinary and/or transnational teams, and to become flexible and multifunctional players, at the same time staying effective and not burning out. However, they are partially



Figure 2. Recent challenges as business environment context

outdated, and there is a need to develop them further, also it is a challenge for user to choose among many in recent intensive information flow.

In all project countries, there is a wide and diverse range of adult education for companies and their personnel provided by higher education institutions, vocational education institutions, public organizations and their associations, and private educational institutions. Educational services are offered as learning face-to-face, blended learning and online learning. It should be noted that in some of the project partner countries we have observed that adult education providers do not pay enough attention to the study of educational needs (demanded knowledge, skills and attitudes) in SSO SMEs, however it is clear that this responsibility shared among adult education provider and employer. In some cases, information on the educational needs of employers or employees is obtained indirectly, rather than through purposeful acquaintance with the situation in companies and the educational needs of employees in the workplace. The question is also whether training programs (based on needs analyses) ultimately meet the companies' actual staff growth needs (see Figure 3).

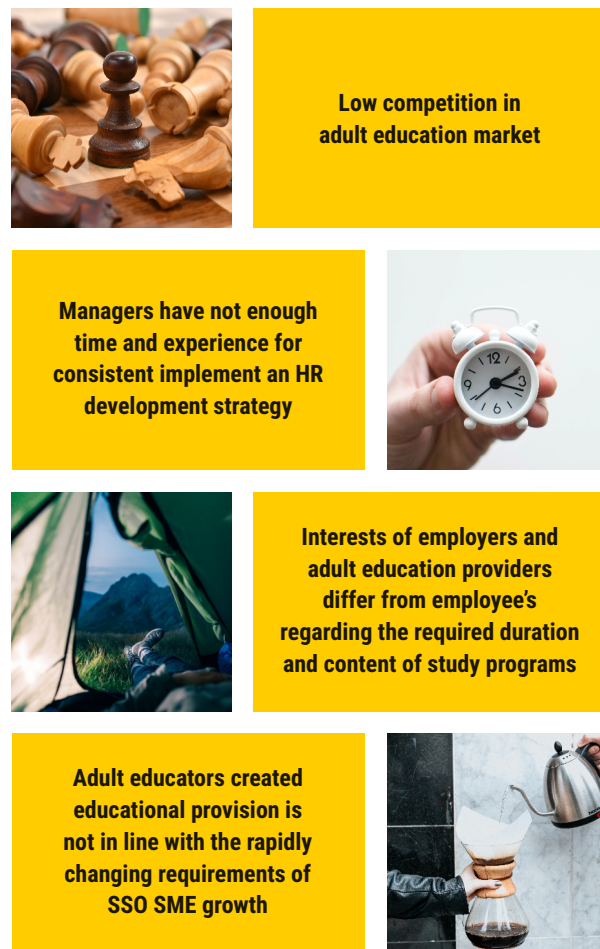


Figure 3. Recent challenges in adult education in the project PULSE partner countries

Stakeholders who directly and indirectly influence the offer and supply of adult education measures for SSO SMEs are public administration institutions, municipalities, professional associations, business associations, associations of adult education organizations, counselling networks (rural counselling service, forest service, business support centers, business incubators, clusters, etc.). Certainly, they are policy developers in adult education and lifelong learning or participate in its development at the national level can have the most significant impact on support for staff development in SSO SMEs. Systematic nature of national level planning documents in adult education, approach to administration of financial resources (centralized or decentralized), monitoring of policy implementation, which provides feedback information on the efficiency of resource investments in accordance with the set qualitative and quantitative indicators are important.

2. Description of tools

2.1. Conceptual view on the selected tools for SSO SME's Human Resource Management

Project partners have selected several tools addressed to adult educators, experts and SMEs to ensure different processes: 1) identification of educational needs; 2) assessment of adult educator skills, knowledge and competencies; 3) setting up strategic day-to day HR management and individual learning process plan (see Figure 4).

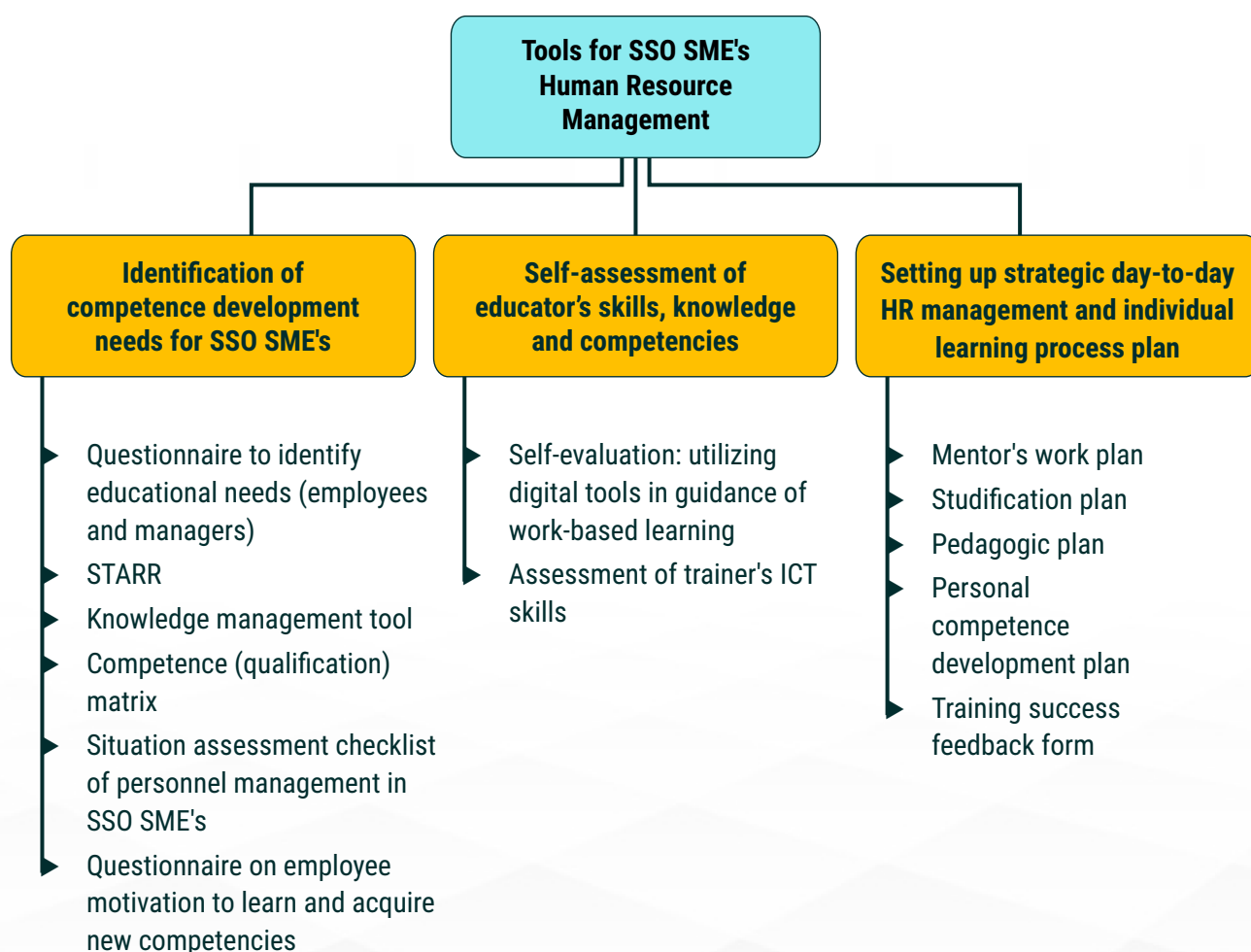


Figure 4. Tools for SSO SME's Human Resource Management structured by purpose of usage



Tools for **Identification of competence development needs for SSO SMEs** are addressed for both – adult educators (Questionnaire to identify educational needs (employees and managers), STARR) and SMEs (Knowledge management tool, Competence (qualification) matrix, Situation assessment checklist of personnel management in SSO SMEs, Questionnaire on employee motivation to learn and acquire new competencies) as direct users. The main aim of application of these tools is to identify the recent situation and future tasks in regards of human resource management. The result is data for analysis in different forms that later should be used in the development of strategic and tactical human resource management planning, including development of learning plans. For instance, adult educators can understand precisely the needs of companies in order to create a relevant educational offer and choose targeted tools and

companies can recognize what type of knowledge, competences and skills are already existing, and which ones have to be developed. As the best practices of data gathering in the context of mentioned tools Interviews (group discussion and individual interviews with representatives) and On-site visits and observations are highly suggested.

Tools for **Self-assessment of educator's skills, knowledge and competencies** are used by adult educators in the wider meaning of this term. The main aim of the application of these tools is to assess the relevance of the adult educator's competencies before learning process and evaluate performance of usage of certain aspects in learning process after completion of it with emphasis on ICT skills. In result adult educator can find out which skills one has to improve to ensure relevant learning process, especially in digital environment which is highly topical in recent situation. For the SMEs perspective application of these tools should result in the ability to choose the right expert (e.g., from a data base) in order to provide relevant support for SME for development of individual work plan to improve HR management (incl. specific competences and skills) in the company. Can be organized online.

Implementation of tools for **Setting up strategic day-to day HR management and individual learning process plan** should be done by strong collaboration of both - adult educators (provide suggestions, facilitate the process) and SMEs (decisions about content and form), as they include mutual agreements in organizational and individual level, too. The main aim of applications of these tools is to help a manager or responsible employee of HR in the company to set up strategic day-to day HR management and individual learning process plan. As the result SME has developed strategic day-to-day HR management system and is ready to provide learning and training process in accordance with learning plan. Form of application of the above mentioned tools is online sessions or face to face discussions.

2.2. Descriptions of tools

Further detailed descriptions about the tools of SSO SME's Human Resource Management are provided (starting on the next page). Descriptions contain general information about the tool, information about the form and content, main address (one who would apply the tool however – as stated before, the majority of them can be applied in good collaboration of **adult educators**  and **SSO SMEs** ) and link to the practical dimension of tool - templates, question lists, checklists etc.










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2.2.1. Identification of competence development needs for SSO SMEs

QUESTIONNAIRE FOR MANAGER








 About	Questionnaire contains open questions, that are both – qualitative and quantitative in nature.
 Aim	To identify knowledge and competencies which can be developed by implementation of educational events.
 User	Adult education providers 
 Content	<p>1. General (mostly qualitative) question themes</p> <ul style="list-style-type: none">- main education needs of your company- skills and knowledge from personnel perspective- skills and knowledge gaps- learning activity organization- main barriers or obstacles for education activities- further vision of implementation of educational activities <p>2. Specific questions</p> <ul style="list-style-type: none">- duration and form of the ideal learning process for employees- type of education <p>3. Recognition of prior learning and planning competence development</p> <ul style="list-style-type: none">- recognition of prior learning (incl. studification*)- current experience/opinion about studification- future vision of role of studification- the main obstacles or barriers for studification in your company? <p><i>*Studification means that a person studies by developing competences in professional tasks. Besides working in professional tasks, competences development may also take place in other activities.</i></p>
 Resources	Question list for managers (see Annex 1) 



QUESTIONNAIRE FOR EMPLOYEE








 About	Questionnaire contains open questions, that are both – qualitative and quantitative in nature.
 Aim	To identify knowledge and competencies which can be developed by implementation of educational events.
 User	Adult education providers 
 Content	<ol style="list-style-type: none"> 1. Current situation <ul style="list-style-type: none"> - current education, knowledge and skills meet the requirements of tasks and routines in your work - areas of expertise, that are most important to successfully run your tasks - special skills your company is expecting you to have or learn - education services that are available and useful 2. Future needs of competences (skills, knowledge, attitudes) <ul style="list-style-type: none"> - new skills and competences for future - current skills and expertise for further development - educational needs in near future - personal career goals - motivation to develop your skills, knowledge, and expertise 3. Possibilities and obstacles <ul style="list-style-type: none"> - the main obstacles/barriers for education activities in your company and personally - relevant setting of educational activities - key persons for decisions and operations
 Resources	Question list for employees (see Annex 2) 

STARR








 About	STARR is an abbreviation that comes from key aspects - situation, tasks, activities, results, reflection. It is a self-analysis tool for employee and can be used for both – individual learning plan development and organizational skill, knowledge and competence research.
 Aim	To assess employee's skills
 User	Adult education providers 
 Content	<ol style="list-style-type: none"> 1. Personal information 2. Situation (description of the place (e.g. workplace) associated with particular experience); 3. Activities (what has been done, motivation and arguments for choice of particular course of action, alternatives, methods/means); 4. Reflection.
 Resources	STARR template (see Annex 7) 



KNOWLEDGE MANAGEMENT TOOL








 About	The goal of managing knowledge is to improve organizational performance by getting the right information to the right people at the right time. Knowledge management is a cyclic process where value is derived from knowledge by making it accessible to everyone within an organization. Knowledge management is a process that requests creation of specific culture where the result is dependent on ability to devote time resource, personality specifics and process maintenance. This tool is associated with the initial phases of knowledge management as knowledge discovery and capture. The result of application of the tool provides ground information for phases of knowledge sharing and application.	
 Aim	To identify recent situation resources and gaps (particular employees) and ability level of potential knowledge management.	
 User	SSO SME	
 Content	<ol style="list-style-type: none"> 1. Individual information about employees 2. Defined skills (e.g. particular skills, by technical level etc.) 3. Assessment of each skill (e.g. learns, works with, but in slow pace, works independently, can teach others) 	
 Resources	Knowledge management skills matrix (see Annex 14) 	

COMPETENCE (QUALIFICATION MATRIX)








 About	Competence (qualification) matrix that provides an overview of desired, existing and missing competences in relation to every employee. A competence matrix is an effective visual tool that helps identify the strengths and weaknesses of own employees, and plan how to take advantage of some employees' strengths to improve the competencies of others.	
 Aim	To document the competences that the employees should possess is to develop.	
 User	SSO SME	
 Content	<p>The main information units in competence (qualification matrix) are:</p> <ul style="list-style-type: none"> - identification of all activity fields in business area of company - services, roles of employees - competence groups (e.g. trade oriented, personal, technical) - evaluation whether specific competence exists or should be developed - the rate of existing competence (%) 	
 Resources	Competence (qualification) matrix template example (see Annex 12) 	










SHRM SITUATION ASSESSMENT CHECKLIST

 About	This tool will help to determine the extent of adoption of the SHRM practices in the company. The tool is based on the evaluation of different items on SHRM practices by using a scale (from very low extent to very high extent).
 Aim	To identify the extent of adoption of SHRM practices for business success in SME
 User	SSO SME 
 Content	<ol style="list-style-type: none"> 1. Identified SHRM practices 2. Assessment of each practice by using (from very low extent to a very high extent)
 Resources	SHRM Situation assessment checklist template (see Annex 13) 

SITUATION ASSESSMENT OF PERSONNEL MANAGEMENT IN SSO SMES

 About	This tool will help to assess the situation of personnel management in company. When assessing the situation in your company, you can answer all the questions in checklist , or choose and explore in more depth the questions that reflect currently problematic area in the company, areas you would like to improve, areas you have never explored in depth.
 Aim	To assess the situation of personnel management in company.
 User	SSO SME 
 Content	<ol style="list-style-type: none"> 1. Information about company 2. Information about recent HR management practices 3. Information of future challenges and company's capabilities in regards of HR management
 Resources	Situation assessment checklist template (see Annex 11) 








QUESTIONNAIRE ON EMPLOYEE MOTIVATION TO LEARN AND ACQUIRE NEW COMPETENCIES

 About	Assessment of employee's motivations and internal communication is done in order to identify situation in the mentioned areas in the organization. Data should be used for strategic and tactical recommendations for the improvement of internal communication within the organization. It is envisaged to be filled in an interview conducted by the person responsible of the human resources in the company, but it may be also developed as a self-assessment questionnaire.
 Aim	To identify the situation in regards of employee motivation to learn and acquire new competencies.
 User	SSO SME 
 Content	Questionnaire contains 2 question sets: <ul style="list-style-type: none"> 1. Comfort level when expressing needs and ideas in the company 2. Adequacy and fluency of internal communication
 Resources	Situation assessment checklist template (see Annex 15) 










2.2.2. Self-assessment of educator's skills, knowledge and competencies

SELF-EVALUATION: UTILIZING DIGITAL TOOLS IN GUIDANCE OF WORK-BASED LEARNING

 About	Self-evaluation of utilizing digital tools in guidance of work - based learning is based on structured self-assessment.
 Aim	To identify levels of the skills of using digital tools in guidance of work - based learning.
 User	Adult education providers 
 Content	Self-evaluation aspects: <ol style="list-style-type: none"> 1) Informing, advising and guidance; 2) Ensuring and preparing competence development; 3) Assessing development towards learning goals (competence development); 4) Feedback and utilizing feedback.
 Resources	Self-evaluation template here (see Annex 4) 








ASSESSMENT OF TRAINER'S ICT SKILLS

 About	A tool that enables trainers to identify their strengths and possibilities for development in following several skill areas, according to The European Digital Competence Framework.
 Aim	To assess adult educators ICT skill level 
 User	Adult education providers
 Content	<ol style="list-style-type: none"> 1. Analytical and creative working, information management <ul style="list-style-type: none"> <i>Skill 1: Producing information</i> <i>Skill 2: information management</i> <i>Skill 3: Collecting information</i> 2. Practical skills and programming <ul style="list-style-type: none"> <i>Skill 1: Hardware and software management</i> <i>Skill 2: Programming and algorithmic thinking</i> 3. Responsible and safe activity <ul style="list-style-type: none"> <i>Skill 1: Responsibility, law and intellectual property rights</i> <i>Skill 2: Safety and risk management</i> <i>Skill 3: Ergonomics</i> 4. Interaction and networking <ul style="list-style-type: none"> <i>Skill 1: ICT (digital) interaction and communication skills and networking</i>
 Resources	ICT skills assessment template (see Annex 5) 










2.2.3. Setting up strategic day-to day HR management and individual learning process plan

MENTOR'S WORK PLAN








 About	<p>Along conventional personnel development measures, many companies now take advantage of mentoring activities. Mentoring is a tool to encourage professional development of staff, where more experienced staff members serve as advisors or counsellors for newcomers/less experienced colleagues. Throughout this process, the mentor and the mentee build a relationship where the latter feels safe enough to share whatever issues are affecting his or her professional and personal development. Mentors work plan implementation should end up with conclusions and recommendations of the most relevant tools for an organization or particular trainee. The tool is helpful in facilitation of planning of learning activities.</p>
 Aim	<p>To plan structure and review for mentor's work in regards of the learning process.</p>
 User	<p>Adult educators, SSO SMEs</p>  
 Content	<ol style="list-style-type: none">1. Mentors information;2. Diagnostics (problem analysis) stage. Mentor conducts an interview with the aim to set few development goals and the ways to achieve them, the measures that both the mentor and mentee pledge to undertake, timelines for goals, resources, success indicators;3. Actual implementation. Throughout the defined period of time, the mentor and mentee carry out their activities as planned, and meet on a regular basis (or keep in touch by phone or online communication tools) to evaluate the intermediate progress and adjust either the development goals, or the measures to achieve them;4. Final evaluation and planning follow-up activities. At the end of the mentoring progress, the parties assess the level of achievement of the goals (additionally, discuss a set of activities the mentee can do individually).
 Resources	<p>Mentors workplan template (see Annex 6);</p>



STUDIFICATION PLAN









 About	It is essential to have a plan for studification and take care of the documentation of realization of the plan. At the end competences are assessed in competences demonstration (competence tests). The tool is helpful in facilitation of planning of learning activities.	
 Aim	To prepare a realistic plan for studification	
 User	SSO SMEs, Adult education providers	 
 Content	<ol style="list-style-type: none"> 1. Learner information, working place information, trainer information. 2. Learning process (goals and aims, competences required in the study program, study process organization, feedback on learning, assessment procedure). 3. Description of studification (competences acquired in professional tasks, documentation planning, preliminary timetable, plan for acquiring theoretical information and understanding in professional tasks). 4. Demonstrating competences (how, when documentation, listing and updating all the documents that are part of competences demonstrations). 5. Guidance (meeting dates, themes dealt in guidance). 6. Data protection. 	
 Resources	Studification plan template here (see Annex 3)	

PEDAGOGIC PLAN









 About	Pedagogic plan helps to structure pedagogic process in SME. It is elaborated by adult educator or mentor after research of educational needs in SME and agreement about form.	
 Aim	To structure pedagogic process in SME, to ensure relevant employees personal development support and planning.	
 User	Adult educators, SSO SMEs	 
 Content	<ol style="list-style-type: none"> 1. Learning approach; 2. Didactical model / pedagogical approach (also, in a digital environment); 3. Characteristics and feedback of the target group; 4. Study contents; 5. Learning materials; 6. Assignments and study modes; 7. Technology; 8. Teacher's activities; 9. Feedback and assessment; 10. Other things that should be taken into account. 	
 Resources	Pedagogic plan template (see Annex 9)	



PERSONAL COMPETENCE DEVELOPMENT PLAN

 About	The tool is presented in a form of template, that consist of 10 questions and can be used when planning SME's personnel's competence development processes. The template is holistic in nature and covers the whole process of learning and training (competence development). Education service provider is responsible that all the questions presented in template are discussed and answered during the process. Discussions are held between a student and trainer.	
 Aim	To structure pedagogic process in SME, to ensure relevant employees personal development support and planning.	
 User	Adult educators, SSO SMEs	 
 Content	Question groups in template: <ol style="list-style-type: none"> 1. Personal information 2. Qualification 3. Planned modules of qualification 4. Recognition of prior working experience / skills. Working experience in the field of qualification 5. Other working experience 6. Prior qualification / examination 7. Assessment of prior learning 8. Current skills evaluation 9. Guidance and special support needed 10. Individual study guidance 	
 Resources	Personal development plan template here (see Annex 8) 	

TRAINING SUCCESS FEEDBACK FORM

 About	For training result or success measurement it is always important to gather feedback from participants, i.e. staff of the company in question (by asking them to fill in evaluation forms at the end of the course/session. In general – trainee has to evaluate satisfaction levels with different aspects of the training course.	
 Aim	To gather feedback about the learning activities.	
 User	Adult educators, SSO SMEs	 
 Content	Questions in feedback form should include such themes as: <ul style="list-style-type: none"> - Relevance of the promised content in the course description and reality; - General evaluation of the gains; - Evaluation of course teachers, facilitators, mentors etc.; - Materials, methods, atmosphere - Information about further contact. 	
 Resources	Feedback form for training participants (see Annex 10) 	


3. Recommendations for stakeholders

One of the project target groups are stakeholders (e.g. public institutions responsible for education guidance and counselling, education quality assurance, employers' associations, trade unions, adult education associations etc.). Currently, the planning process has only just begun, so it is difficult to judge what the final versions of the planning documents will look like in each of the project countries. However, right now, lifelong learning and adult education stakeholders have the opportunity to assess in general which measures and actions could be the most effective, what should be their impact and output indicators; how to change approaches of funds administration; how to balance the vertical and horizontal influence of EU fund; how to integrate solutions of cross-cutting issues (gender equality, reduction of all forms of discrimination and inequality, creation of equal opportunities for all) in the planned actions.

We recommend to use checklist: **Assessment stakeholder's opportunities and risks.**

Checklist that includes such question sets:

1. Assessment of the reflection of the human resources development of SSO SMEs in the long-term national development plans of the countries, in the development documents of various individual policies, including the lifelong learning and adult education policy documents;
2. Linkage and succession between the national development plans, various sectoral policy documents to promote the availability and development of human resources in SSO SMEs;
3. Direct and indirect impact of the current state education policy, including overall lifelong learning policy, higher, vocational, and adult education policies on the development of human resources in SSO SMEs;
4. Direct support from state and EU funds (current, planned in 2021-2027) for the development of competencies of SSO SMEs;
5. Ensuring the quality, diversification, territorial distribution of adult education providers' services addressed to the development of SSO SMEs' human resources and promoting the competitiveness of providers;
6. Access to career and educational counselling for employers and employees of SSO SMEs;
7. Assessment of SSO SMEs employees' learning motivation and actual opportunities for learning, including acquisition of higher formal education, continuing vocational education, non-formal education for the general and professional development;
8. Assessment of the necessary changes in the administration mechanisms of state and EU financial resources.

Resources: Checklist **(see Annex 16)** 



4. Thematically addressed methodological and institutional suggestions for involved parties

4.1. Adult educator's and experts

Methodological level:

- 1) **Develop and introduce the tools to identify the HR competence (educational) needs of a particular company:**
 - arrange visits to the company and conduct one-to-one interviews with the HR manager, managing director or any other person responsible for HR management and development.
 - use the existing templates or develop new ones to document the needs of the company.
 - Conduct interviews with the staff of the company, diagnosing their level of competence in a particular area to better tailor the contents of the educational activity to their needs.
- 2) **Adapt your offers to the needs of the company / peculiarities of its environment:** adapting to the needs of the company means not only considering the level of competence of the staff, but also taking into account organizational aspects, for example, working hours (regular 8-hour working days, shift work etc.). Some occupations hardly allow for off-site trainings, which means those could be substituted for work-based activities or online sessions/activities. Training formats could be: full-time in-class training (5-6 days a week), part-time in-class training (e.g., two times a week in the evening), online learning with several in-class training sessions (on weekends);
- 3) **Measure the success of the learning activity upon its completion by:**
 - a) gathering feedback from participants, i.e. staff of the company in question.
 - b) reaching out to the employer to check their level of satisfaction, and correspondence between initial expectations and the ultimate result;
- 4) **Offer "follow-up activities"** – this means that, e.g., within a month or so a client may contact the trainer or counsellor to get answers to emerging questions or receive feedback regarding the newly introduced practices, behavior patterns etc.;
- 5) **Conduct regular reality checks:** when developing a portfolio of educational services for companies, it is advised to check whether they are still in demand. To do so, one can compare the statistics regarding the participation rates over the last couple of years, the number of recurrent requests for the same activity or for new ones on similar topics submitted by the same company, etc.;
- 6) **Improve and update your digital skills on a regular basis and develop the portfolio of online/digital educational offers.** The level of digitalization in companies is growing day by day, and so is the number of digital tools they might potentially use for HR management and development purposes. To be able to advise companies on the use of those, an adult educator or counsellor has to be "digitally fit" themselves. This means, on the one hand, you have to be aware which free-of-charge and fee-based digital solutions there are on the market, and, on the other one, embed those in your own practices. This might enrich your methodological toolkit and diversify the modes of work with companies, which can result in attracting news clients, in the long run.



Institutional level:

- 1) Establish a **procedure for recruiting, selecting and retaining trainers**. Adult education centers often depend heavily on the work of external trainers, whereas the number of external trainers is low. Therefore, it is important to establish a procedure for recruiting and selecting suitable trainers, and retaining their loyalty afterwards;
- 2) Successful and mutually beneficial cooperation between adult education institutions/experts does not boil down to the development of relevant training programs and services. It requires a certain level of **networking with colleagues and representatives of companies** under question – whether in a working group, expert panel, trade-specific network, etc. This is especially important for the branches and field that were identified as “smart specialization” areas in the region;
- 3) Securing the presence of highly qualified staff should ideally start long before the job interviews and recruitment stage. There is an important role of **dual vocation education (VET) / dual apprenticeship** that is meant to create the bridge between theoretical knowledge and practical skills of a student and ensure smooth transition from training to the world of work. Sure it requires a strong commitment of VET stakeholders in the framework of Dual VET, therefore, co-decision and cooperation are promoted through formal mechanisms (where the interests of all parties are integrated);

4.2. SSO SMES

- 1) The first step to consistent and comprehensive personnel development is acknowledging the fact that the staff, its high competence and commitment, is one of the determining factors in any company's viability and success. Having that in mind, an HR manager, owner or managing director of a company should move on to the next step – **development of an HR development strategy**. In many cases HR development strategies boil down to a set of training activities for personnel without regard to the overall strategy of the enterprise, whereas strategic personnel development, personnel management strategy, HR recruitment and personnel marketing should form a comprehensive package in line with the global goals of the company. It is clear that the ability of each enterprise to invest money and effort in staff development would differ greatly. In this sense, an HR development strategy should comprise a basic set of measures and activities that will ensure steady and adequate development of personnel, on the one hand, and are in line with the company's capacities, on the other one.



The main steps in the development of an HR development strategy are:

1. Needs analysis	This step is meant to provide information about the current situation and expected changes. To that end, a detailed SWOT-analysis can be used. The sources of relevant data are: interviews with employees, official statistics, demographic studies, analysis of age differentiation at the enterprise, information about performance etc. The analysis includes two components: evaluation of external challenges, and assessment of the framework conditions of the enterprise.
2. Goal setting	During this step an example of the identified fields of actions should include information about the strategic field of actions, goals and measures. Once the possible lines of activities are identified, they have to be assessed against various criteria: required investments, risks, benefits, etc. Taking into account those criteria, one makes an overall assessment and identifies the priority of every field of action. It has to be taken into account that some of the suggested goals and activities might contradict each other: for example, some of the measures meant to contribute to cost optimization may interfere with the goal of strengthening customer loyalty.
3. Development planning	This step includes identification of the priority lines of activities are identified and arranged in a personnel development strategy. The identification of priority fields of action is only possible when one has a clear understanding of own business model and how it differs from its competitors.
4. Implementation	In this phase plan developed in the previous step is implemented. It can be done either single-handedly, or with the involvement of external experts.
5. Monitoring	The stage entails revisions and regular updates of HR development strategy and updated depending on external factors (e.g., market conditions) and internal framework conditions.

- 2) **Make up a list of knowledge, skills and competences** that each key occupation group in your enterprise should possess – this could be used to assess the competences of prospective employees during a job interview (and, ideally, while observing a candidate fulfilling test exercises), as well as to evaluate the current level of competence and/or the progress of “old-timers”. As a starting reference, one could use European or National Qualification Frameworks that outline the learning outcomes (in the context of knowledge, skills, responsibility and autonomy) for specific occupations.
- 3) **Maintain constant communication with the employees.** Now, this might seem as a very time-consuming activity, but, provided that the right tools are chosen, regular communication with the staff may contribute greatly to the positive working atmosphere and overall performance of the enterprise, in particular.
- 4) **Introduce the practice of regular one-to-one interviews with the employees** (at least once a year). Such meetings can be scheduled for the periods of economic quiet conditions when the consumer demand goes down a bit. One-to-one meeting present wonderful opportunities to share the feedback regarding the progress of an employee, provide recommendations for



further improvement and, ideally, jointly make a simple plan on how to achieve those improvement goals. On the other hand, during such meetings, an HR manager can also receive feedback of the staff member – in particular, their assessment of own progress, strengths and weaknesses, concerns and ideas for the improvement of working processes in the company, etc.

- 4) **Conduct training activities.** The form, frequency, duration and comprehensiveness of training activities depends on many factors – such as the capacities of an enterprise (incl. financial ones), the scope of the problem to be addressed by the training, the ability of employees to discontinue work for some time etc. There are several options how to organize, support and facilitate training activities:
- a) Motivating staff to single-handedly improve their knowledge and skills and encouraging collegial exchange;
 - b) Using the expertise of highly-experienced staff members to conduct on-the-job trainings (work-based learning activities);
 - c) Conducting external trainings, attending trade-specific events etc.

The options can be combined or used independently.

4.3. Stakeholders

- 1) **Ensure the timely exchange of information by using various communication channels.**
- 2) **Develop the portfolio of services meant to build the capacities of member organizations by:**
 - providing counsel to the development and implementation of advanced training for commercial professions, advanced training for adult educators and networking, examination-related services;
 - development of guidelines, manuals and supporting materials on different topics and in various program areas;
 - advanced training courses for the staff of adult education centers and trainers;
 - counselling on the topic "open course program", work with corporate clients, fundraising, etc.;
 - research and knowledge transfer (organization of events on the transfer of innovations and the best practices, studies of statistical data, strategies and research papers on the topics relevant for adult education centers);
 - lobby work and cooperation.

Those services are provided by various working groups that have various compositions depending on the topic and type of intervention.

- 3) **Create opportunities to exchange information and ideas.** Regular meetings can provide for the space to exchange latest news, concerns, developments, etc. Inviting the representatives of various sectors to such a meeting, both the companies and education providers, may enable the former to voice their needs and expectations, and the latter – to better adapt their educational services to the actual needs of enterprises.
- 4) **Encourage networking on a local and regional level, initiate the creation of cross-sectoral working groups**



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Annex

Annex 1

Questionnaire for managers

General (mostly qualitative) questions

- ▶ What are the main education needs in your company now (within a few months -next year) and in the future (within next 2-5 years)?
- ▶ Describe, how necessary each of them are for your company and its business operations? Which are most important, and why?
- ▶ What skills and knowledge your company's personnel find most important for successful business running and development of operations?
- ▶ Specify, what kind of skills and knowledge are lacking or needed to be enhanced? Management skills, business skills, ICT-skills, marketing and sales skills, communication skills, skills specific to your current and/or future business areas, etc.
- ▶ Estimate, how much working time and money is possible/realistic to allocate on personnel learning activities?
- ▶ What are the main barriers or obstacles that may inhibit the education activities in your company? Specify and estimate, how severe and enduring they may be?
- ▶ Can you see any possible obstacles to learning?
- ▶ What should be happening that the educational activities you consider important for the development and running your business, could be possible?

Specific (more quantitative) questions

- ▶ How long would be the ideal learning process for employees?
- ▶ An ideal length of the training program (days, weeks, months)?
- ▶ How many times and how often (e.g. 10 times once a week)?
- ▶ Duration of training? (e.g. 2 x 45 min)
- ▶ Type of education? (online, webinars, seminars, lectures, workshops, etc.)?

Annex 2

Questionnaire for Employees

Theme 1: Current situation

- ▶ Describe, how your current education, knowledge and skills meet the requirements of your tasks and routines in your work?
- ▶ What are the areas of expertise, that are most important to successfully run your tasks and make your working more efficient and meaningful for you and for your company?
- ▶ What special skills your company is expecting you to have or learn?
- ▶ Describe the current situation of education services that are available and useful for your purposes.

Theme 2: Future needs of competences (skills, knowledge, attitudes)

Describe, what new skills and competences you expect to need in future?

- ▶ If you could choose, would you prefer to develop your current skills and expertise further, or to learn new skills and areas of expertise?
- ▶ What could be your educational needs in near future?
- ▶ What are your personal career goals?
- ▶ Are you interested to develop your skills, knowledge, and expertise? If yes, when, and how? If no, why not?

Theme 3: Possibilities and obstacles

- ▶ Main obstacles/barriers for education activities in your company and for you personally?
- ▶ Possible obstacles raising from schedules, time resources, timing, content quality and responsiveness to competence development needs?
- ▶ What should happen or be done so that educational activities could be realistic?
- ▶ Who are the key persons in decisions and operations?

Annex 3

Studification plan content

1. Learner information (name, address, contact information).
2. Working place information (name, address/location, contact person, business field).
3. Mentor, tutor, trainer or/and adult education provider information (name, address/location, contact information).
4. Learning process goals and aims (competences, course, studies):
 - 4.1. competences required in the study program;
 - 4.2. what to study, when, where;
 - 4.3. modes of study (how to study);
 - 4.4. feedback of learning;
 - 4.5. when and how to assess.
5. Description of studification:
 - 5.1. what competences are acquired in professional tasks;
 - 5.2. how are the competences acquired and in what professional tasks;
 - 5.3. how is documentation planned and ensured;
 - 5.4. what is the preliminary timetable;
 - 5.5. what is the plan for acquiring theoretical information and understanding in professional tasks (what are the sources and methods).
6. Demonstrating competences:
 - 6.1. how (working in professional tasks, interview, demonstration etc.);
 - 6.2. when (dated for competence demonstrations);
 - 6.3. documentation (possible documents listed to competence demonstrations);
7. Documentation for competences demonstration (listing and updating all the documents that are part of competences demonstrations (portfolio, reports, blog, diary, competence demonstration in agreed date, etc.).
8. Guidance:
 - 8.1. guidance meeting dates (at the beginning, mid-term, at the end);
 - 8.2. themes dealt in guidance.
9. Data protection:
 - 9.1. data, documentation, and materials description (SME specific documentation listed);
 - 9.2. digital tools description;
 - 9.3. on-line communication (mail, platforms, on-line);

Annex 4

Self-evaluation: utilizing digital tools in guidance of work-based learning

Informing, advising and guidance	Not part of my tasks currently	Not familiar or not able to carry out	I can / are familiar in a very basic level	I can / are familiar very well	I can help others in these tasks
I can guide students to utilise digital resources and materials in planning their studies (study modes, funding of the studies, financial benefits for studying).					
I can guide employers or workplace instructors to digital resources concerning organising studies and studies in the workplace (study modes, funding, services available for workplaces).					

Ensuring and preparing competence development	Not part of my tasks currently	Not familiar or not able to carry out	I can / are familiar in a very basic level	I can / are familiar very well	I can help others in these tasks
I can utilise digital tools in planning apprenticeship (and other relevant contracts), guiding personal competence development plans, and training workplace instructors to their tasks.					
I can instruct employers, workplace instructors and students how to utilise different digital tools in cooperation and communication (i.e. Teams, Zoom, Skype)					

Assessing development towards learning goals (competence development)	Not part of my tasks currently	Not familiar or not able to carry out	I can / are familiar in a very basic level	I can / are familiar very well	I can help others in these tasks
I can utilize digital tools in assessing development towards learning goals and assessing competences in competence tests.					
I can train employer's representatives, workplace instructors and students on how to utilize digital tools in assessing learning and assessing competence tests.					
I can take data protection issues into account in utilizing digital tools.					
I can inform workplace instructors and students on data protection principles.					
I understand the importance of protecting company specific data and can in my part ensure data protection.					

Feedback and utilising feedback	Not part of my tasks currently	Not familiar or not able to carry out	I can / are familiar in a very basic level	I can / are familiar very well	I can help others in these tasks
I can utilise digital tools in collecting feedback.					
I can document information on feedback to digital systems.					

Annex 5

Trainer's (adult educator's) ICT-skills assessment

Theme 1 - Analytic and creative working, information management

Skill 1: Producing information

Not only searching, managing, applying and assessing Information is a relevant skill, also information and media production skills are relevant skills in the future. In basic education it is important that learners have the ability to produce new contents and they can utilize different software and tools in producing content and as self-impression tools. Ability to visualize information is essential.

Level 0	Level 1	Level 2	Level 3
The trainer does not guide learners to produce information utilizing ICT.	Learners get to know different ways to produce contents utilizing ICT. Learners get to know different styles in visualization.	Learners practice contents production and visualization in trainer's guidance.	Learners combine different methods in producing content. Learners act in collaboration and share results to other learners. Trainer guides learners to visualize produced information and assess, how different visualizations fit different contexts.

Skill 2: Information management

Description: Amount, availability and production of information has grown significantly. For learners it is important to learn to manage (save, archive and share) information. Ability to manage, design and combine information is essential in problem solving and in producing new information. Learners produce a portfolio from their own activities and self-assess development of their thinking.

Level 0	Level 1	Level 2	Level 3
A trainer does not offer learners different possibilities for digital information management (platforms, cloud solutions, shared folders) or even possibilities to get information regarding them.	The trainer offers information...	Learners utilize...	Learner generates new ways and share...

Skill 3: Collecting information

Due to the rapid growth in amount of information, efficient and reliable information collection is necessary. Practicing the use of different search engines and data storages, understanding their functional logics and ability to assess the reliability of information are important skills for learners. It is relevant to be aware of the variety of collecting information (other ways added to search engines) and to understand the importance of handling *and utilizing information*.

Level 0	Level 1	Level 2	Level 3
A trainer does not offer learners possibilities for practicing information collecting.	The trainer offers information on the most common search engines...	Learners utilize most common search engines and data storages/sources...	Learner generates together new ways to collect, combine and share information...

Theme 2 - Practical skills and programming**Skill 1: Hardware and software management**

It is important for learners to understand the functional logic and principles of different digital hardware and variety of software usage, and the relevant concepts related to them. Ability to recognize, select and utilize the various hardware and software is necessary for utilizing the benefits of various solutions and tools in learning and other activities.

Level 0	Level 1	Level 2	Level 3
A trainer does not plan learning in a way that would offer learners possibilities to learn digital hardware and software.	The trainer offers information...	Learners use in trainer's supervision...	Learner selects utilize independently and utilize widely...

Skill 2: Programming and algorithmic thinking

It is important for learners to recognize the essential concepts and practices of programming, and to understand how those are linked to their everyday life by planning processes of various machines and services. Learners should have equal opportunities and access for developing algorithmic thinking and programming skills for understanding and interpreting digital world and society. Algorithmic skills are helping learners to generate their own ideas and solutions. Learners also learn to see ICT possibilities in all possible areas and fields.

Level 0	Level 1	Level 2	Level 3
A trainer does not include in his teaching programming and algorithmic thinking themes.	Trainer guides learners to find algorithmic thinking themes from their environment and gives simple programming assignments.	Learners concentrate deeply to concepts and practices...	Learner concentrates deeply into the design processes of...

Theme 3 – Responsible and safe activity

Skill 1: Responsibility, law and intellectual property rights

It is important for learners to be aware and recognize the laws governing internet communication and to understand what is allowed and what is not (i.e. privacy, intellectual property rights). It is equally important to be able to critically study the history and background of intellectual property rights laws as an expressions of various interest groups and as including different outcomes to different groups.

Level 0	Level 1	Level 2	Level 3
A trainer does handle in his teaching laws governing internet communication.	The trainer provides information...	Learner studies...	Learner critically analyzes...

Skill 2: Safety and risk management

In internet there are many safety and protection issues and risks affecting individuals and information. It's important that in basic education learners are guided to recognize these risks and to safeguard their own activities in a proper way.

Level 0	Level 1	Level 2	Level 3
A trainer does handle safety issues in his teaching.	Trainer introduces discussion regarding safety issues...	In learning context, learners are guided to study their own safety issues...	Learners learn independently to study and evaluate...

Skill 3: Ergonomics

Good ergonomics is an important element in all levels of human activity. Ergonomics includes both physical and cognitive aspects. That is why it's important that a trainer takes care of his own and learners' working ergonomics and aims at guiding learners to be aware and self-directive in these matters.

Level 0	Level 1	Level 2	Level 3
A trainer does take into account ergonomics in teaching and guiding situations.	The trainer teaches...	Learners actively practice...	Learners can independently take care of...

Theme 4 – Interaction and networking

Skill 1: ICT (digital) interaction and communication skills and networking

Learners should be guided to safe and appropriate digital interaction. It is important to learn sound communication and interaction ways and manners in digital environments, and how these environments can be utilized in learning and in dialogue between homes and schools. For learners it's important to learn to use various collaborative services in a safe manner and to administrate their public user profiles accordingly. In education it's important to pinpoint the ways how digital social platforms can be used in learning and as a tool for thinking and information production.

Level 0	Level 1	Level 2	Level 3
A trainer does include communication tools or collaborative services in his teaching.	The trainer demonstrates...	Learners actively practice...	Learners utilize in diverse manner...

Annex 6

Mentor's work plan template

MENTEE'S PERSONAL DATA				
Name:		Email:		Qualification:
Date of birth:		Position:		Experience in the current position (years):
Phone number:		Department:		Key tasks of the position:
PROBLEM ANALYSIS (based on the initial interview with the mentee) 1. <i>The mentee does not cope with the whole scope of work on time and/or cannot deliver quality results.</i> 2. ... 3. ...				
DEVELOPMENT GOAL 1 (knowledge, skills or competences to be obtained/improved): <i>To introduce the mentee to various time-management and task prioritization techniques and enable him to try them out in practice to find the most effective one.</i>				
Mentee's activities	Mentor's activities	Target dates / milestones	Resources and support needed	Success indicators
1. <i>Get acquainted with presented time management and task prioritization techniques.</i> 2. <i>Try out at least 1 time management and 1 task prioritization technique throughout a week.</i> 3. <i>Reflect at the end of the week if the applied techniques improved work performance.</i>	1. <i>Introduce the mentee to simple and applicable techniques of time management and task prioritization (e.g. Eisenhower method, or the "urgency-importance" method).</i> 2. <i>Collect mentee's feedback about the use of specific techniques, provide alternative solutions if needed.</i>	1. <i>Offline meetings once in 2 weeks.</i> 2. <i>Evaluation session at the end of the mentoring programme.</i>	1. <i>Input about various time management and task prioritization techniques.</i> 2. <i>Ongoing communication via messaging services (upon request.)</i> 3. <i>Regular offline meetings, evaluation session at the end.</i> 4. <i>Clarification from superiors about the urgency/importance of allotted tasks.</i>	1. <i>The amount of overtime hours has reduced (general work-life balance has improved).</i> 2. <i>The mentee receives more positive testimonies about his work from superiors.</i>
PROGRESS EVALUATION DATE: _____ <i>Within 3 weeks, the mentee has tried out a number of time management and task prioritization techniques and identified those that help him arrange his working time and fulfil his job duties in the best possible way. As a result, the number of overtime hours has reduced, and the feedback of superiors about the quality of work has improved.</i>				
REVISED DEVELOPMENT GOAL 1: <i>revision is not needed</i>				

DEVELOPMENT GOAL 2 (knowledge, skills or competences to be obtained/improved):

Mentee's activities	Mentor's activities	Target dates / milestones	Resources and support needed	Success indicators

PROGRESS EVALUATION

DATE: _____

REVISED DEVELOPMENT GOAL 2:

DEVELOPMENT GOAL 3 (knowledge, skills, or competences to be obtained/improved):

Mentee's activities	Mentor's activities	Target dates / milestones	Resources and support needed	Success indicators

PROGRESS EVALUATION

DATE: _____

REVISED DEVELOPMENT GOAL 3:

FINAL EVALUATION

DATE: _____

FOLLOW-UP ACTIVITIES

Annex 7

STARR method template

1. Personal data (the collection of personal data depends on the needs and be decided case by case)

Name	
Family name	
Occupation	
Phone	
...	

2. STARR (Situation, tasks, activities, results, reflection) self-analyse

Situation	Where the experience was received (for example, the description of the workplace)
Task(s)	The employee's place in the organizational structure, regular duties, and level of responsibility
Activities	In the description of the activity, attention can also be paid to the aspect of the analysis, e.g. why this particular course of action was chosen and what the alternatives would have been, but also more broadly, e.g. based on which choices are made. The description must be written so that the reader can understand what has been done and what kind of methods/means has been used.
Results	If a longer period of work is described, the results that the employee considers to be particularly important can be highlighted here. From a learning perspective, it may be even more important than success to describe some results that were not as expected and prompted to analyze and change one's actions. However, it would be best to describe the results in a "before and now" way of thinking, where the applicant distinguishes the results achieved in the past from what he or she is now achieving and describes the difference between them.
Reflection	The analysis part is the most important in the application. In this section, the links between the competence or learning outcome sought and the experience described become clear. The analysis is a type of self-analysis based on what has been learned from experience. In the case of longer-term work experience, the analysis should describe in particular what has been learned and how it has developed during that period. The analysis must logically relate to the previous, descriptive parts. For example, it is good to link the results of your work with learning from experience. The analysis can also have a forward-looking perspective on what is still to be learned and developed.

Annex 8

Personal competence development plan

1. **Personal data (the collection of personal data depends on the needs and be decided case by case)**

First name		Last name	
Nationality		Language	
E-mail		Phone	

2. **Qualification**

Name of the qualification (or course)

3. **Planned modules of qualification**

Name of the study module	
Study period	
Date of beginning	
Approximate date of graduation	
Name of the institution of vocational education	

4. **Recognition of prior working experience / skills Working experience in the field of qualification**

Name of the employer / organization	
Assignment (tasks, job description)	
Date and duration	

5. **Other working experience**

Name of the employer / organization	
Assignment (tasks, job description)	
Date and duration	

6. **Prior qualification / examination**

Name of the qualification / examination	
Name of the institution	
Year of the graduation	

7. Assessment of prior learning. i.e. Competence related to the qualification that is acquired practicing different professions or recreational activities, or in some other way

Competences related to qualification in question	
Work certificates	
Assessor (teacher name and date)	
Assessor (company representative name and date)	
Decision on accreditation of prior learning	
The reasons for rejecting the application	

8. Current skills evaluation

Self-assessment (by student)

	Excellent	Good	Average	Poor (weak)
Mathematics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ICT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Guidance and special support needed

--

10. Individual study guidance

Date	
The issues considered	
Participants	
Way of communication	

Signatures and date _____

Date	
The issues considered	
Participants	
Way of communication	

Signatures and date _____

Date	
The issues considered	
Participants	
Way of communication	

Signatures and date _____

Date	
The issues considered	
Participants	
Way of communication	

Signatures and date _____

Date	
The issues considered	
Participants	
Way of communication	

Signatures and date _____

Date	
The issues considered	
Participants	
Way of communication	

Signatures and date _____

Date	
The issues considered	
Participants	
Way of communication	

Signatures and date _____

Annex 9

Pedagogic plan

1. Learning approach

What is the learning approach behind the training program and how is it implemented in training?

What does selected learning approach mean from a point of view of student and teacher?

Are digital tools aimed in a process in line with the selected learning approach?

2. Didactical model / pedagogical approach in a digital environment

What are the learning goals? What are activities of teacher/trainer? What are activities of students?

How do selected pedagogical methods support learning goals?

What are selected interaction and communication methods and tools (aims, between whom, what channels)?

3. Characteristics and feedback of the target group

What are the special characteristics of the target group? What is the starting level of students? What do students already know and what competences they possess? Are there differences in motivation? Are students used to work in a digital environment? Do students possess technological tools for attendance? How is feedback collected and dealt with? Are there specific needs in the target group?

4. Study contents

What are the contents and how are those structured? Do some contents require attendance in face-to-face training?

5. Learning materials

How the usability, functionality, substance relevance and other aspect of material quality are taken into account? How is it ensured that the material is easy to produce and update?

What is the structure of materials? Who is producing materials?

6. Assignments and study modes

What kind of assignment types are used in training? Are assignments in line with pedagogical principles, how? How are assignments supporting learning? How is web-based interaction carried out?

7. Technology

Networks, systems, solutions, applications, software and other tools.

Risk assessment for different scenarios.

8. Teacher's activities

What are the expectations from a teacher in different phases of training? When and how is a teacher available or reachable?

9. Feedback and assessment

How is feedback collected and assessed?

Who and how is self-assessment carried out?

10. Other things that should be taken into account





Annex 10

Evaluation form (example)

Dear participant, we kindly ask you for your assistance, as only when we know what you liked during the course and what caused inconveniences, we can make necessary changes and meet your expectations to a greater extent next time.

It goes without saying that this questionnaire is anonymous. Please put the filled in evaluation form in the prepaid envelope and send it within the coming days. Thanks a lot!

Course No _____ Name of the course _____ Date _____

				
1. To which extent does the description of the course in the course catalogue correspond to reality?				
2. Was the consultation provided by the VHS useful (in case you made use of such a service)?				
3. Were our contact persons friendly to you?				
4. How do you evaluate the venue and technical facilities?				
5. Did the trainer manage to motivate you and pass over the knowledge to you?				
6. Did you have enough opportunities to practice speaking in the foreign language during the course?				
7. How diverse and practice-oriented was the course?				
8. To which extent did the trainer manage to create a positive working atmosphere during the course?				
9. Are you satisfied with the exercise book (if used)?				
10. Are you satisfied with the supplementary materials used by the trainer?				
11. Was the proficiency level of the participants comparable?				
12. How do you assess the course so far?				

Other comments regarding the course: _____

What you have always wanted to tell us: _____

I would like to request a phone call from the VHS*: _____

* in this case we kindly ask you to provide your name and phone number: _____

Annex 11

Checklist: Situation assessment of personnel management in SSO SMEs

The following questions will help you assess the situation. When assessing the situation in your company, you can answer all the questions, or choose and explore in more depth the questions that reflect the currently problematic area in the company, areas you would like to improve, areas you have never explored in depth.

Consider:

- ▶ Is the current structure of the company and the available staff in line with the company's goals for the near future?
- ▶ Do you have a clear procedure for looking for the right staff (procedures, methods, tools)?
- ▶ Who is the right employee - does each position have a description of competencies / requirements?
- ▶ How many vacancies did you fill with internal candidates?
- ▶ Are new employees familiar with personnel management procedures and policies, i.e. Is there a "new employee guide" in the company?
- ▶ What were the costs of selection and recruitment of staff in the last calendar year? Internal selection / external selection.
- ▶ How do you analyze employee turnover in the company? Where do you store this information?
- ▶ Which are your key employees? In which positions is the turnover of employees the lowest? In which positions employee turnover is highest? Why? How much did it cost the company?
- ▶ Does each employee understand the competency requirements for performing their work in a high-quality and efficient manner?
- ▶ How often do employees receive / provide feedback on their activities and on increasing the efficiency of those activities? How many honest and frequent feedback conversations?
- ▶ What is the remuneration system in the company?
- ▶ Does the current remuneration system consist of a stable part of the remuneration and a variable part depending on the results of the work?
- ▶ Is it usual for people to move to entirely different positions in different sections within the company, where other skills, talents, and expertise they have can be deployed?
- ▶ Does the company support people in exploring all their options, all their possible career paths - even when those paths lead outside the organization?
- ▶ What competitive advantage do working people bring to the company?
- ▶ Will the company be able to cope with future challenges in its current form?
- ▶ Are performance levels high enough to meet demands for increased profitability, innovation, higher productivity, better quality, and improved customer service?
- ▶ What is the level of commitment to the company?
- ▶ Are there any potential constraints such as skill shortages or HR problems?
- ▶ What is the nature of the corporate culture? Is it supportive of the business?

Annex 12

Competence (qualification) matrix

Field	Service, role	Name	Competences (required / existing)	Trade-specific			Methodological				Personal			Existing
				Technology in handicraft industry	Office and production management	Customer service, attendance	Error diagnostics, problem solving skill	Process management	Project management	Quality management	Self-organisation, result-oriented performance	Communication, languages, teamwork	Customer orientation	Competence rate (index)
Execution	Installation, hot line, maintenance / Field service engineer	AB	REQ	9	1	4	9	4	2	6	5	5	5	
	Installation, hot line, maintenance / Field service engineer	AB	EX	9	1	4	9	4	2	6	5	5	5	100%
	Hot line, help desk, support, training	CD	REQ	7	2	5	9	6	3	6	5	5	5	
	Hot line, help desk, support, training	CD	EX	6	2	5	9	6	3	6	5	5	5	98%
	Logistics of spare parts / External partners	EF	REQ	4	8	6	3	6	2	7	5	5	5	
	Logistics of spare parts / External partners	EF	EX	4	8	6	3	6	2	7	5	5	5	100%
Planning	User support / application	GH	REQ	7	7	7	7	7	7	7	6	6	6	
	User support / application	GH	EX	5	1	3	7	7	7	7	6	6	6	82%
	New concepts, innovation / developers	IJ	REQ	8	8	8	9	9	9	9	7	7	7	
	New concepts, innovation / developers	IJ	EX	3	3	3	3	7	9	9	7	7	7	72%
Distribution	Consulting, alternatives, offers / Consultant	KL	REQ	5	8	5	7	6	6	6	8	8	8	
	Consulting, alternatives, offers / Consultant	KL	EX	5	8	5	7	6	6	6	8	8	8	100%
	Customer acquisition, information, prior analysis / Management	MN	REQ	5	7	6	5	5	5	5	9	9	9	
	Customer acquisition, information, prior analysis / Management	MN	EX	5	7	6	5	5	5	5	9	9	9	100%

Competence = Qualification + Skills + Experience

Measures

- Minor competence gaps - new tasks, adaptation to work
- Medium competence gaps - internal training, coaching
- Major competence gap - external training, coaching

Competence rate (index)

- 87% - 100%
- 78% - 86%
- 0% - 77%

Evaluation

- 1 untrained, less than 3 years of experience
- 2 internally instructed, less than 3 years of experience
- 3 trained, basic qualification, less than 3 years of experience
- 4 advanced qualification, less than 3 years of experience
- 5 mastered, more than 3 years of experience
- 6 mastered, more than 6 years of experience
- 7 mastered, more than 12 years of experience
- 8 suitable for difficult tasks
- 9 suitable for difficult tasks

Annex 13

SHRM practices for business success

Items on SHRM practices	Very High Extent	High Extent	Moderate Extent	Low Extent	Very low Extent
Recruiting suitable employees based on need.					
Placing new employees appropriately within the organization.					
Training and developing personnel to meet staffing needs of the organization.					
Using social activities to improve staff interaction.					
Spotting errors and effecting changes in subordinates through proper staff control.					
Keeping abreast of an utilizing new techniques of planning.					
Keeping adequate staff records.					
Acknowledging staff performance to motivate higher performance.					
Utilizing staff advice appropriately.					
Delegating authority to subordinates.					
Encouraging innovations through effective planning.					
Interacting and exchanging ideas with subordinates.					
Being polite when interacting with subordinates.					
Using clearly spelt out rules and regulations for duty performance.					
Avoiding preferential treatment in handling personnel matters.					
Establishing policies on staff matters.					
Using suitable criteria for staff appraisal.					
Showing appreciation for personnel' efforts.					
Providing necessary facilities to work.					

Annex 14

Knowledge management tool

XXX bar operations													Categories						
Technological operation complexity class			1	1	1	2	1.5	1	1	1	1	1	1	0.5	0.5				
Serial number			time-card number		Name Surname		1. Unpacking of components, including orders, their execution												
							2. Work with drilling machines according to order accessories												
							3. Work on the blasting machine												
							xxx												
							xxx												
							6. Work with contact welding machines												
							7. Work with welding machines (gas-electric)												
							xxx												
							xxx												
							11. Manual processing of various accessories for frames according to accessories												
							xxx												
							xxx												
							14. Cleaning of components before painting												
							Points												
							1												
							2												
							3												
							4												
					</														

Annex 15

Questionnaire on employee motivation to learn and acquire new competencies as well as for the improvement of internal communication within the organization

Preamble (in case of interview):

Thank you for taking the time to participate in this interview. This discussion will take no longer than 30 minutes. My name is XXXXXXXX; I am the responsible for Human Resources in the organization.

Before we start, I need to ask you to sign the informed consent document you have in front of you. I would like to remind you that you are free to withdraw from the interview at any time, without giving a reason. I will be asking you some questions and look forward to hearing your answers.

There are no right or wrong answers to these questions. I am looking for your opinion and what we are intending with these interviews is to enhance our company internal communication and better identify the training needs of our staff in order to improve the overall competitiveness of the company.

Before starting the formal questionnaire, a courtesy question like How are you? Do you feel comfortable in the company? These questions may also depend on the country context or social manners. If there is a problem, we may ask him/her to express if he/she wants.

1. Do you in general feel comfortable (feel listened, no fear of offence or rejection, etc.) when expressing your needs and ideas in the company?

Yes ☐

No ☐

Rate communication with the following partners by using a scale from 1 to 5, where 5 is absolutely comfortable and 1- not comfortable.

	1	2	3	4	5
To other colleagues in the same team					
To other Departments					
To superiors					
To staff in charge					
To others					

2. Due to your observations and experience, which aspects are improving in our organization due to internal communication? Rate aspects by using a scale from 1 to 5, where 5 "a lot" and 1 "not at all".

	1	2	3	4	5
Increase competitiveness					
Increase and exchange knowledge					
Improve the working environment					
Enhance team building					
Facilitate new business opportunities					
Improve employees' rights					

If there are other aspects, please specify _____

3. How do you think we could improve the internal communication in the company?

Now we are going to move forward to some questions oriented to our business activity and the training needs.

4. What do you think about learning in our organization? Why it is important?

5. In this moment, which knowledge do you consider you would need for work. Please, rate each option from 5 "most needed" to 1 "least needed".

	1	2	3	4	5
Updating existing knowledge					
Acquiring a new knowledge that would be positive for your work and company					
Acquiring a new knowledge that would be positive for upgrading your position within the company					
Anticipate to changes in the industry					
Enhancing your skills					

If considered, please, comment what kind of knowledge would you like to acquire:

6. Have you ever asked the employer for specific training when you feel you need to improve your competences/skills to properly perform your tasks in the company?

If yes, then – what was the situation? _____

If not, why? _____

7. Would you prefer internal training (the training is carried out by other employees/managers who already got the specific skills) or external training (the training is carried out by external specialist/ AE providers). Why? _____

8. What are your expectations about the organizational form of training (mark appropriate)?

Yes No Not important

Training is organized in working hours

☐ ☐ ☐

Training is organized in the facilities of our organization

☐ ☐ ☐

Why? _____

9. What would you need to take the training during the working hours? (e.g.: discontinue part of your work/tasks for some time) _____
10. Have you observed the younger employees are more motivated to take training than the elder ones? Why? _____
11. Do you think that those employees who have been working in the company for less time (e.g.: less than one year and a half or two years) are more motivated to take training than those who have been working in the company for a longer period? Why? _____
12. Would you like the company to provide and foster a space where employees can exchange ideas, news and new approaches? _____
13. How often do you think employees should meet to exchange ideas? _____
14. According to your preference, rate from 5 "most likely" to 1 "least likely" why you would like to take training:

	1	2	3	4	5
Improve your skills					
Improve your knowledge					
To strengthen cooperation with other employees					
Cover a time-off work of another employee with a different qualification or job position					
Fill a job vacancy					
Upgrade your position					
Access to further training or higher-level education (you need a previous training, which the company offers to you, to access a higher-level education)					

If any other reason, please specify: _____

Thank you for your time, we have finished. The information you have provided is very valuable and we will have it in consideration together with the ones of your colleagues. We would like to maintain a similar dialogue with you and the rest of the employees at least once a year, but we would kindly ask you to anticipate and take the initiative in case you consider a new training is required in order to adapt the company to the market evolution.

Annex 16

Checklist: Assessment stakeholder's opportunities and risks when planning investments in adult education for SSO SMES human resource capacity growth

1. Assessment of the reflection of the human resources development of SSO SMEs in the long-term national development plans of the countries, in the development documents of various individual policies, including the lifelong learning and adult education policy documents, as follows:

- 1.1. The National Development Plan
- 1.2. Smart specialization policy
- 1.3. ICT development policy
- 1.4. Economic policy
- 1.5. Entrepreneurship, including SMES policy
- 1.6. Employment policy
- 1.7. Sustainable environment development policy, including limiting climate change
- 1.8. Regional development policy
- 1.9. Demographic policy
- 1.10. Welfare and health policy
- 1.11. Education policy:
 - 1.11.1. Lifelong learning policy
 - 1.11.2. Adult education policy
 - 1.11.3. Vocational education policy
 - 1.11.4. Higher education policy
 - 1.11.5. Science and research policy

2. Linkage and succession between the national development plans, various sectoral policy documents to promote the availability and development of human resources in SSO SMEs:

- 2.1. How the overall, high-level policy documents are specified in laws and other regulatory enactments, strategies, long-term and operational (current year) plans, specialized sectoral or cross-sectoral operational programs, etc. in relation to the availability and development of human resources for SSO SMEs?
- 2.1. What are the main direct or indirect performance indicators of various policies, indicators that ensure monitoring of the availability and development of human resources in SSO SMEs?
- 2.2. Which state institution monitors the availability and development of human resources for SSO SMEs and based on which planning documents?
- 2.3. Which state institutions, regional and local government institutions, as well as institutions established by them in the country promote the availability and

development of human resources in SSO SMEs?

- 2.4. How is the availability of EU and state financial support for the development of human resources territorially and by economic sectors SSO SMEs ensured?

3. Direct and indirect impact of the current state education policy, including overall lifelong learning policy, higher, vocational, and adult education policies on the development of human resources in SSO SMEs:

- 3.1. Is public education policy a lifelong learning policy, i.e. whether all levels and types of education are perceived as part of a single lifelong learning system. If not, why not?
- 3.2. What institutions manage the development of lifelong learning as a unified education system at the national, regional, and local government level?
- 3.3. Do regional and local authorities have a delegated role in coordinating the activities of all types and levels of educational institutions (public, municipal, private, NGOs) to meet the educational needs of people of all ages (from birth to the end of their lives) using efficient existing infrastructure and human resources and the EU, state, local government funding for their operation?
- 3.4. What is the system of planning and monitoring the development of lifelong learning in state, regional institutions, and local government level?
- 3.5. How is the training and operational management of lifelong learning staff at all levels? Who in the country is responsible for this management process?
- 3.5. How does the state invest in the training of adult education specialists, including adult education management specialists?
- 3.6. Is the career and education counselling system one of the pillars of the national lifelong learning system? Is it modern, effective for planning and implementing an individual's education and work paths throughout life?
- 3.7. Does the infrastructure and specialists of the career and education counselling system contribute to the staff development of SSO SMEs?
- 3.8. Does the understanding of the structure of the educational needs of the population at all levels and in all forms of its management, regardless of the age of the target group, reflect the needs of value orientation, civic participation, social inclusion, sustainable development, employment?
- 3.9. Are comprehensive publicity measures regularly implemented in the country explaining lifelong learning and issues as follows:
- ▶ Lifelong learning,
 - ▶ Learning to learn,
 - ▶ Basic skills required,
 - ▶ Key skills required,
 - ▶ The responsibility of leaders and managers for the learning of their employees and followers,
 - ▶ The importance of employers learning in achieving strategic goals of the companies,

- ▶ The importance of education for human activity and well-being in the broadest sense in a sustainable development model,
- ▶ The role of learning and knowledge management in an economy and society based on smart specialization?

3.10. Are there differentiated publicity measures, campaigns aimed at the transition of companies to smart specialization and the necessary staff competencies?

4. Direct support from state and EU funds (current, planned in 2021-2027) for the development of competencies of SSO SMEs:

- 4.1. Business education for entrepreneurs (managers), for improving innovation management skills and accelerating the growth of companies:
 - 4.1.1. Tailor-made business management training programs with the involvement of teachers and entrepreneurs from other countries;
 - 4.1.2. Hackathons;
 - 4.1.3. Forums, conferences;
 - 4.1.4. Master classes;
 - 4.1.5. Mentoring programs;
 - 4.1.6. Coaching programs.
- 4.2. Innovation motivation and support measures for managers with an educational component:
 - 4.2.1. Business incubators;
 - 4.2.2. Support programs for start-ups;
 - 4.2.3. Participation of start-ups in exhibitions, conferences, and direct visits abroad;
 - 4.2.4. Innovation voucher support services;
 - 4.2.4. Support for commercialization of research results;
 - 4.2.5. Promotion of international competitiveness;
 - 4.2.6. Training programs for human resource management capacity and development and implementation of the company's human resource policy;
 - 4.2.7. State and other funders support for staff training for SSO SMEs:
 - 4.2.7.1. Support for the recruitment and training of highly qualified staff for SSO SMEs;
 - 4.2.7.2. Support for mentoring and training of medium-skilled employees inside and outside the company (including maintenance of salaries, scholarship, coverage of travel and subsistence expenses);
 - 4.2.7.3. Support for mentoring and training of low-skilled employees inside and outside the company (including maintenance of salaries, scholarship, coverage of travel and subsistence expenses);
 - 4.2.7.4. Support for foreign investors to attract qualified labor.

5. Ensuring the quality, diversification, territorial distribution of adult education providers' services addressed to the development of SSO SMEs' human resources and promoting the competitiveness of providers:

- 5.1. Introduction of company vouchers for training of employee groups (see p.4.) to increase the development and implementation of tailor-made programs in accordance with the strategic development needs of SSO SMEs;
- 5.2. Introduction of company vouchers for individual training of employee's programs in accordance with the strategic development needs of SSO SMEs;
- 5.3. Grant schemes for adult education providers in partnership with SSO SMEs for the introduction of mentoring in these companies;
- 5.4. Grant schemes - pilot projects for adult education service providers in partnership with SSO SMEs for the development and implementation of human resource management policies;
- 5.5. Grant schemes - pilot projects for adult education service providers in partnership with SSO SMEs to assess the competencies of employees and innovative solutions to increase them;
- 5.6. Vouchers for cooperation between SSO SMEs and formal education institutions (vocational, higher education) for the development and adaptation of new formal education and non-formal education curricula according to the needs of SMES;
- 5.7. Funding of regional programs for human resource development of SSO SMEs, implemented in cooperation between SSO SMEs, business associations, training (including adult education providers) and research institutions;
- 5.8. Funding for sectoral human resources support programs for SSO SMEs, the implementation of which involves interdisciplinary interactions, as well as cooperation between SSO SMEs, business associations, training (including adult education providers) and research institutions.

6. Access to career and educational counselling for employers and employees of SSO SMEs:

- 6.1. Is there a unified career and education counselling system in the country, which is available for children, young people, adults;
- 6.2. Does the existing infrastructure of the career and education counselling system ensure the availability of these services for children, youth, adults throughout the country and lifetime;
- 6.3. To what extent does the career and education counselling services offered promote entrepreneurship and employment in general, including the development of SSO SMEs human resources;
- 6.4. How do entrepreneurs assess the economic efficiency of career and education counselling services? What is it actually;
- 6.5. What measures financed by the state, local governments and EU funds promote the cooperation of career and education counselling service providers with employers and employees of SSO SMEs;
- 6.6. Do career and education counsellors compile information on barriers that prevent

employees from participating in training or are forced to stop it? How is this information used to develop regional, national, EU-funded adult education services;

- 6.7. Do career and education counsellors collect and analyse information obtained from clients on the quality and role of national and EU-funded education services in clients' employment and careers;

7. Assessment of SSO SMEs employees' learning motivation and actual opportunities for learning, including acquisition of higher formal education, continuing vocational education, non-formal education for the general and professional development:

- 7.1. To what extent is employees' motivation to learn affected by their income level and working conditions;
- 7.2. Is an adequate place and time of study chosen when organizing the training for SSO SMEs employees;
- 7.3. Is the average salary maintained during studies? If no, how its affect the participation in learning;
- 7.4. Are all training-related expenses provided by funders (scholarship, daily allowance, hotel expenses, flexible coverage of transport expenses (for public transport or car);
- 7.5. Do measures to support employee training really help to remove all or part of the objective and subjective barriers to learning;
- 7.6. How do the motivation of the participants be influenced by the design and quality of the implementation of the educational programs (teacher's experience, methods, teaching aids, equipment for practical training, materials, and learning environment).

8. Assessment of the necessary changes in the administrative mechanisms of state and EU financial resources:

- 8.1. How to determine the actual impact of EU and state funded adult education activities on the development of human resources in SSO SMEs, as the potential for innovation and cooperation of employees is important for adults - not just the acquisition of certain programs in a defined amount of hours;
- 8.2. Reorientation towards the actual impact of training on SSO SMES competitiveness locally and internationally, rather than choosing cheap costs as the only criterion (for training and support measures);
- 8.3. Abandonment of large quantitative indicators (e.g. number of participants in training) in favor of the quality and economic efficiency of training, the actual impact of their results on the employee's competences in the workplace;
- 8.4. Strengthen the measurement of the satisfaction of state and EU-supported training participants (employees and employers), as well as the monitoring of costs (taking into account the number of dropouts, the mismatch of acquired training programs with the competence deficit in the workplace and the competitiveness of the company as a whole;
- 8.5. Increasing diversity of financial resource administration mechanisms: increasing attention how administrative mechanisms ensure of funds territorial and sectoral distribution as well as increased number of involved stakeholders and cooperation among them.



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