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LEARN: Towards a Holistic Transformation of Organisations into Learning Workplaces

Class A Activities

MMC Mediterranean Management Centre

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Class A Activities

CA1: Job Rotation

BB1

BB1 Encourage employers to adopt a learning culture that supports career-long learning

1.1. Activity Code

CA1: Job Rotation

1.2. Building Block on which the activity is based

- ☑ Encourage employers to adopt a learning culture that supports career-long learning [Holistic approach through differentiation of work tasks] (BB1)

1.3. Type of Activity or Tool

- ☑ Other

1.4. Field of improvement

- ☑ Employee On-the-Job Skills

1.5. Scope of the activity

Through *Job Rotation*, employees within an organisation/a company undertake new tasks and responsibilities and acquire new knowledge and skills by shifting between different job positions or by exchanging job positions.

The benefits of job rotation become visible when the personnel within an organisation/a company becomes multi-skilled and interchangeable, which contributes to the organisation/company's greater adaptability thanks to the mobility and increased knowledge and skills' exchange that it entails. For the employees involved, it can be of great interest because of the variety of tasks that they undertake.

Employees who rotate accumulate more knowledge than others by being 'exposed' to a wide range of experiences. In return, organisations/companies learn more about their own employees, as they can observe how they perform different tasks. In this way, they can identify formal, non-formal, and informal forms of learning that they could make use of, regardless of the department that their employees work for and their expertise, or the number of employees they have, which can contribute significantly to the development and improved performance of employees.

1.6. Who should lead the activity?

The HR Department in collaboration with the management of the organisation/company.

1.7. Who should attend the activity?

The middle management and the employees.

1.8. Description of the activity

Job rotation is about establishing a systematic process of transitioning employees between job positions including exchanging employees in specific job positions, and periodically evaluating the development of the employees involved.

This can be achieved by either moving employees from one department or department unit of the organisation/company to another or by exchanging job positions between employees working at different departments or department units.

It is important to ensure that the involved departments/department units interact and/or the job positions of origin and destination entail similar tasks and/or requested skills. Job positions that entail different tasks or request different skills can be exchanged too, but it is recommended that in such case voluntary employees are involved and a monitoring system is always in place.

From an organisational point of view, employees' rotation implies appropriate training of the individuals involved in order to carry out new tasks and gain new knowledge, while the organisation/company acquires greater knowledge of their capabilities by observing their performance in different positions.

1.9. Duration and frequency of implementation of the activity

- One to two weeks to invite the staff or part of the staff to participate in job rotation and to receive applications for participation.

- One week to develop a record of employees who have applied for job rotation, including their job position description, qualifications, and skills as well as suggested 'pairs of employees' (in case of job exchange).

- The period of job rotation depends on the needs of the organisation/company and the departments/department units involved. A minimum duration of two weeks for each job rotation is suggested.

- One to two weeks for the participants to evaluate the activity and the composition of an annual report on the job rotations implemented.

Calls for participation in *Job Rotation* can be announced throughout the year depending on the organisation/company's needs.

1.10. Minimum and maximum number of participants in the activity (if applicable)

No limits are foreseen. However, it is recommended to have a small number of employee transitions, which can be increased if the organisation/company is experienced in rotating its personnel.

1.11. Prerequisites for participating in the activity (if applicable)

Job rotation is recommended for employees who will voluntarily express their interest in moving from one job position to another or exchanging job positions with other employees, or employees recommended by the HR department or the management.

1.12. Resources for the activity

- Job Rotation/Exchange Application Form (Annex 1)
- Employee Job Description and Matching Record (Annex 2)
- Annual Record of Job Rotations (Annex 3)
- Annual Record of Employees Exchanging Job Positions (Annex 4)
- Job Rotation Evaluation Questionnaire (Annex 5)
- Job Rotation and Exchange Annual Report (Annex 6)
- Internal communication tools: bulletins, online newsletters, e-mails etc.

1.13. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

Through a reaction evaluation questionnaire (Job Rotation Evaluation Questionnaire, Annex 5) to be filled out by the employee at the end of the job rotation or exchange period.

1.14. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

When establishing a system of job rotation, this must be monitored. It is important to evaluate the results of the activity but also to avoid possible deterioration of the relations among employees. It should be noted that the transitions/exchanges will not only affect the employees involved but also colleagues working close to them.

Therefore, it is a good practice to explain well in advance to all the staff in the departments concerned how job rotation will take place, for how long, and to invite them to consult with the HR Department and/or the management, when necessary.

The complete information on the activity and the invitation to participate will be either addressed directly to the staff or to the Heads of Departments in order to propose who should participate in the activity.

Applications for participation (*Job Rotation/Exchange Application Form, Annex 1*) are received by the HR Department and/or the management with an indication of the desired destination department, and a record of employees interested in participating in job rotation (including information such as their job position description and related qualifications and skills, as well as justification for applying for job rotation) is developed (Employee Job Description and Matching Record, Annex 2). Possible 'employee matches' can be also included in case job rotation will take the form of job position exchange.

As soon as the employees' record is completed, two different records are developed: one for job rotations (*Annual Record of Job Rotations, Annex 3*) and one for job exchanges (Annual Record of Employees Exchanging Job Positions, Annex 4), depending on the decision taken by the HR department or the management for each request received. The selected employees are notified about their participation in the activity and a training session is organised on the nature, objectives, and obligations of the activity.

For a specific period of time depending on the complexity of the new tasks undertaken, the participating employees can be assisted by employees at the same job position or employees with whom they have exchanged positions (the one to explain the basics of their work to the other). Then, the period of rotation starts.

When the period of rotation finishes, a satisfaction survey is conducted (Annex 5) and an annual report on job rotation and/or exchange is composed by the HR Department and/or the management (*Job Rotation and Exchange Annual Report, Annex 6*).

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

Anonymously through an evaluation questionnaire (Learning Diary Evaluation Questionnaire, Annex 3), which will be distributed to the participants at the end of the year.

Also, feedback on the participants' satisfaction with keeping learning diaries will be collected through discussion as part of the annual appraisal interview/annual performance review meeting of the organisation.

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

The learning outcomes related to the learning diary activity will be evaluated by the employer as part of the annual appraisal interview/annual performance review meeting with employees. A section named 'Learning' should be added to the organisation's form on employees' annual appraisal.

Examples for learning evaluation questions to be posed in the appraisal interview/annual performance review meeting:

- Based on your learning diary, can you name three challenges that you faced in the workplace this year?

- Based on your learning diary, can you name three things that you learnt (by confronting the respective challenges) in the workplace this year that are important for you/your job?

- Through your learning diary, have you identified any training needs of yours (for the next year)?

  Additionally, self-evaluation of the learning will be done through the fourth section of the learning diary, in which the employee comes to conclusions on his/her learning progress with regards to achieved and non-achieved learning goals.

1.17. List of annexes

Annex 1: Job Rotation/Exchange Application Form
Annex 2: Employee Job Description and Matching Record
Annex 3: Annual Record of Job Rotations
Annex 4: Annual Record of Employees Exchanging Job Positions
Annex 5: Job Rotation Evaluation Questionnaire
Annex 6: Job Rotation and Exchange Annual Report

1.18. List of documentation for the certification

1. Job Rotation/Exchange Application Forms
2. Employee Job Description and Matching Record
3. Annual Record of Job Rotations
4. Annual Record of Employees Exchanging Job Positions
5. Job Rotation Evaluation Questionnaires
6. Job Rotation and Exchange Annual Report

CA2: Knowledge to Share

BB1

BB1 Encourage employers to adopt a learning culture that supports career-long learning

1.1. Activity Code

CA2: Knowledge to Share

1.2. Building Block on which the activity is based

- ☑ Encourage employers to adopt a learning culture that supports career-long learning [Holistic approach through provision of learning] (BB1)

1.3. Activity or Tool

- ☑ Activity

1.4. Type of Activity or Tool

- ☑ Activity for Informal Learning

1.5. Field of improvement

- ☑ Organisation Learning Culture

1.6. Scope of the activity

• To transmit the knowledge of the speaker (manager, senior employee etc.) to the internal value chain of the organisation/-company.

• To distribute new knowledge within the organisation/company and integrate knowledge from outside the organisation/company.

• To improve the provision of internal feedback within the organisation/company.

• To improve collaboration and develop empathy among the employees of the organisation/company.

• To boost both horizontal and vertical communication within the organisation/company.

1.7. Who should lead the activity?

Experienced members of the organisation/company's staff (with a minimum work experience of 3 years) (e.g., managers, senior employees etc.) as speakers and a member of the management staff (manager, supervisor etc.) as the moderator of the activity (the speaker and the moderator can be the same person). Alternatively, an external speaker (expert on a specific topic) can be invited.

1.8. Who should attend the activity?

Anyone from within the organisation/company. Employees from other organisations/companies can be invited and attend the sessions, too.

1.9. Description of the activity

Knowledge to Share is a concept based on the collaboration between people who are committed to mutual understanding and the transmission of knowledge within an organisation/a company, in which experienced members of the personnel (managers, senior employees etc.) willing to share a special personal or professional experience of theirs are encouraged to present and discuss their experience with other employees, or an external speaker is invited to share their knowledge on a specific topic.

It builds on a "transmission-of-knowledge" approach in which different members of the staff/other people provide sessions principally on their area of expertise to support other employees and provide them with advice through their experience.

1.10. Duration and frequency of implementation of the activity

Minimum 1 hour for presenting the experience (sharing the knowledge) and discussing its content.

Throughout the year, every time a worth-presenting experience is identified or an employee wishes to present a special experience of his/hers; at least once a year, either at department or at organisation/company level.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Any number of employees, 1 speaker, and 1 moderator (the speaker and the moderator can be the same person).

1.12. Prerequisites for participating in the activity (if applicable)

For the speaker, to have a minimum work experience of 3 years.

1.13. Resources for the activity

- Computer (optional)
- Projector (optional)
- PowerPoint Presentation / Flip Chart and Markers (optional)
- Sheets of Paper and Pens (optional)
- Knowledge to Share Participant List (Annex 1)
- Knowledge to Share Evaluation Questionnaire (Annex 2)
- Knowledge to Share Evaluation Report (Annex 3)

1.14. Instructions for implementing the activity

The moderator of the activity (probably the person sharing his/her knowledge) informs his/her co-workers well in advance about the organisation of a knowledge-to-share session and its topic. Interested employees should notify the moderator of their intention to attend the session, so that s/he knows the exact number of participants. The knowledge to share (topic of the presentation) can pertain to the professional but also to the personal life of the speaker, given that it has affected somehow his/her career.

In a comfortable space, the participants in the activity sit either in a circle or in rows having with them some sheets of paper and pens for note-taking. The moderator (or speaker) asks from the employees to complete the Knowledge to Share Participant List (Annex 1) and starts by explaining the idea behind the activity. Then, s/he gives the floor to the speaker to present his/her experience (through a PowerPoint presentation or just by talking to the participants).

Before starting the presentation, the speaker can ask a first question to the participants:

· What do you expect to learn from today's activity?

After some of the participants answer, the main part of the activity starts, as follows:

1. Self-introduction of the Speaker

Name, years of work experience in the organisation/company, and current and previous job positions.

2. Presentation of the Experience to Share, e.g., "Career Development of the Speaker"

- First years in the organisation/company (or in specific job position):

How did you start working for the organisation/company?
What was your first position in the organisation/company?
What do you remember from those early days and years?

- Career milestones (when s/he decided to develop himself/herself professionally and advance):

What are your career milestones?
What skills have favoured your development?
What opportunities have you been able to take advantage of?
What obstacles had you have to overcome?

- Being a Good Example for Others

How can others follow the same/a similar career roadmap to professional and also personal development?

3. Q&A and Discussion

As soon as the "knowledge-sharing" part is completed, a discussion between the speaker and the participants starts. First, the speaker invites the participants to ask questions and makes clarifications or elaborates further on the topic. Subsequently, s/he poses questions to the participants on his/her experience or asks them if they have had or have heard about similar experiences. At this point, s/he can make again use of the guiding questions in section 2 above.

Before closing the session, the moderator distributes an evaluation questionnaire for the activity (Knowledge to Share Evaluation Questionnaire, Annex 2) to all the participants.

1.15. Evaluation (Reaction) - How do you evaluate whether the participants are happy with the activity?

Through an evaluation questionnaire for the activity (*Knowledge to Share Evaluation Questionnaire*, Annex 2). The collected results will be used for the development of an evaluation report (*Knowledge to Share Evaluation Report*, Annex 3) on the satisfaction of the participants with the activity.

1.16. Evaluation (Learning) - How do you evaluate whether the participants have learnt new things from the activity?

Through the same evaluation questionnaire (Knowledge to Share Evaluation Questionnaire, Annex 2) the learning achieved through the activity will be also assessed. The collected results will be used for the development of an evaluation report (Knowledge to Share Evaluation Report, Annex 3) which will also draw conclusions on how the participants assimilated the shared knowledge and linked it with their own professional experience.

1.17. List of annexes

Annex 1: Knowledge to Share Participant List
Annex 2: Knowledge to Share Evaluation Questionnaire
Annex 3: Knowledge to Share Evaluation Report

1.18. List of documentation for the certification

1. Knowledge to Share Participant List
2. Knowledge to Share Evaluation Questionnaires
3. Knowledge to Share Evaluation Report
4. PowerPoint presentation used by the speaker (optional)
5. Photos and/or videos of the meeting (optional)

CA3: Post-mortems

BB1

BB1 Encourage employers to adopt a learning culture that supports career-long learning

1.1. Activity Code

CA3: Post-mortems

1.2. Building Block on which the activity is based

- ☑ Encourage employers to adopt a learning culture that supports career-long learning (BB1)

1.3. Activity or Tool

- ☑ Activity

1.4. Type of Activity or Tool

- ☑ Learning Tool

1.5. Field of improvement

- ☑ Employee On-the-job Skills

1.6. Scope of the activity

Post-mortems activity aims to work through what happened and collect the lessons learnt after an incident. Its objective is to define the cause of an incident, explaining why it occurred, its impact, what actions were taken to mitigate it and resolve it (both direct and indirect actions), and what should be done to prevent it from happening again.

1.7. Who should lead the activity?

The Heads of the department(s) involved in the incident (managers or supervisors).

1.8. Who should attend the activity?

The employees of the department(s) involved in the incident.

1.9. Description of the activity

A post-mortem is a process intended to assist in learning from past incidents. It typically involves blame-free analysis or open discussion soon after an event has taken place.

1.10. Duration and frequency of implementation of the activity

Five days to two weeks, depending on the complexity of the incident.

The process should start within maximum two days after the occurrence, so as to ensure that important information can be taken into consideration.

1.11. Minimum and maximum number of participants in the activity (if applicable)

The number of participants in the activity depends on the number of people involved in the incident (main actors and individuals directly and indirectly affected by the incident).

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

- Post-mortem Report (Template and Guidelines) (Annex 1)
- Post-mortem Checklist (Annex 2)
- Post-mortem Review Meeting Report (Annex 3)
- Post-mortem Evaluation Questionnaire (Annex 4)
- Annual Post-mortems Record (Annex 5)

1.14. Instructions for implementing the activity

Whenever an incident occurs, the post-mortem process is initiated with the aim to investigate the incident and start developing a post-mortem report (*Post-mortem Report (Template and Guidelines)*, Annex 1). In the investigation team, all the employees involved in the incident participate or some of them, depending on the case, coordinated by the Head(s) of the department(s) (managers or supervisors) in which the incident took place or which were involved in any way in the occurrence.

Through the post-mortem process, a detailed incident timeline is created that includes a chronological breakdown of events, departments or people involved, information available at the time, and decisions that were made. An analysis of the incident is conducted in order to identify its impact and its root cause. The post-mortem report's content is reviewed by the investigation team leader.

After the investigation period of 5-14 days, a review meeting is scheduled between the key actors of the incident and the management of the organisation/company. During the meeting, the incident is discussed based on the key findings of the investigation included in the post-mortem report, with an emphasis on the planned actions to avoid similar incidents in the future. The most important information about the meeting is recorded in a meeting report (Port-mortem Review Meeting Report, Annex 3).

Each time an incident followed by investigation through the post-mortem process takes place, the *Annual Post-mortems Record* is updated, which is kept on a yearly basis.

1.15. Evaluation (Reaction) - How do you evaluate whether the participants are happy with the activity?

Through the *Post-mortem Evaluation Questionnaire* (Annex 5), which is sent to all the participants in the activity after the post-mortem review meeting.

1.16. Evaluation (Learning) - How do you evaluate whether the participants have learnt new things from the activity?

Through the *Post-mortem Report (Template and Guidelines)* (Annex 1, Part D) and the Post-mortem Review Meeting Report (Annex 3), which are prepared during and after the post-mortem process respectively, presenting, among other useful information, the lessons learnt from the investigated incident.

1.17. List of annexes

Annex 1: Post-mortem Report (Template and Guidelines)
Annex 2: Post-mortem Checklist
Annex 3: Post-mortem Review Meeting Report
Annex 4: Post-mortem Evaluation Questionnaire
Annex 5: Annual Post-mortems Record

1.18. List of documentation for the certification

1. Post-mortem Reports
2. Post-mortem Review Meeting Reports
3. Post-mortem Evaluation Questionnaires
4. Annual Post-mortems Record

CA4: Retrospective

BB1

BB1 Encourage employers to adopt a learning culture that supports career-long learning

1.1. Activity Code

CA4_Retrospective

1.2. Building Block on which the activity is based

- ☑ Encourage employers to adopt a learning culture that supports career-long learning (BB1)

1.3. Activity or Tool

- ☑ Activity

1.4. Type of Activity or Tool

- ☑ Learning Tool

1.5. Field of improvement

- ☑ Organisation Learning Culture

1.6. Scope of the activity

The *Retrospective* activity aims to examine ways to define best practices, make use of lessons learnt, and improve processes followed by a team/department through analysing a project or an activity undertaken by the employees of that team/department.

1.7. Who should lead the activity?

A senior or high-ranking (project) team member (e.g., a supervisor or manager).

1.8. Who should attend the activity?

Employees of the organisation/company involved in a project, an activity, or a process.

1.9. Description of the activity

A “retrospective” is a meeting held by a team at the end of a project, an activity, or a process followed to discuss what was successful about the project, activity, or time period (of maximum 6 months) covered by that retrospective, what could be improved, and how to incorporate successful practices and make improvements in future projects, activities, or processes.

1.10. Duration and frequency of implementation of the activity

Two hours for a meeting at the end of a project, an activity, or a process (or a milestone of them).

The activity should take place every 6 months maximum, i.e., twice a year. If a project, activity, or process has a longer duration than this, after a 6-month period of implementation of the project/activity/process, a retrospective meeting should take place.

In case of medium-sized or large organisations, the activity should be implemented twice a year, by all the departments of the organisation/company.

1.11. Minimum and maximum number of participants in the activity (if applicable)

All the employees involved in the project, activity, or process being examined.

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

- Retrospective Survey Questionnaire (Annex 1)
- Retrospective Meeting Participant List (Annex 2)
- Retrospective Brainstorming and Conclusions Form (Annex 3)
- Retrospective Reaction Evaluation Questionnaire (Annex 4)
- Retrospective Learning Evaluation Questionnaire (Annex 5)

Also, the following will be needed:

- Whiteboard
- Marker
- Sticky notes
- Pens

1.14. Instructions for implementing the activity

The *Retrospective* activity should be implemented as follows:

Two days before the retrospective meeting, a survey on the project/activity/process for which the retrospective activity takes place is being carried out. The survey questionnaire (Retrospective Survey Questionnaire, Annex 1) is sent to all the actors involved in the project/activity/process. As soon as the questionnaires are completed, the data collected is analysed.

Subsequently, a date is set for the retrospective meeting, which is facilitated by the project team leader/activity supervisor/involved department manager, and all the individuals involved in the activity/project/process are invited to participate.

The retrospective meeting has the following structure:

1.Meeting opening
At the beginning of the meeting, the Retrospective Meeting Participant List (Annex 2) is completed.

Then, the achievements of the team are presented and acknowledged; an ice-breaker follows and the purpose of the meeting is explained.

2.The findings of the survey are presented.

3.Information collection during the meeting
On a whiteboard, the facilitator of the meeting collects remarks on the following: what the team members have done well, what they could do better, and what they have learnt from the process they had followed. Everyone writes down at least one comment for each aspect of the discussion on sticky notes distributed by the facilitator.

4. Brainstorming during the meeting
The participants are asked to determine the reasons why they believe specific processes, tasks, etc. went well, there is room for improvement for them, they were able to learn new things through them (new ideas), and also what they can do better in the future (actions). The brainstorming results are being recorded in a form provided to this end (*Retrospective Brainstorming and Conclusions Form*, Annex 3) and are also presented on the whiteboard.

5.Action
Everyone is allowed three votes in order for the team to conclude on the top three things that need to change in future team projects, activities, or processes followed by the team (or the department). The facilitator counts the votes and discuss with the participants the voting results.

6.Meeting conclusion
Based on the discussion, a shared "frame of reference" is created between the team members for upcoming challenges, in the form of meeting conclusions. The concluding remarks are also recorded in the *Retrospective Brainstorming and Conclusions Form* (Annex 3).

1.15. Evaluation (Reaction) - How do you evaluate whether the participants are happy with the activity?

Through an evaluation questionnaire on the satisfaction of the participants with the activity (*Retrospective Reaction Evaluation Questionnaire*, Annex 4).

1.16. Evaluation (Learning) - How do you evaluate whether the participants have learnt new things from the activity?

Through a learning evaluation questionnaire for the activity (*Retrospective Learning Evaluation Questionnaire*, Annex 5).

1.17. List of annexes

Annex 1: Retrospective Survey Questionnaire
Annex 2: Retrospective Meeting Participant List
Annex 3: Retrospective Brainstorming and Conclusions Form
Annex 4: Retrospective Reaction Evaluation Questionnaire
Annex 5: Retrospective Learning Evaluation Questionnaire

1.18. List of documentation for the certification

1. Retrospective Survey Questionnaires
2. Retrospective Meeting Participant List
3. Retrospective Brainstorming and Conclusions Form
4. Retrospective Reaction Evaluation Questionnaires
5. Retrospective Learning Evaluation Questionnaires

CA5: Buddy Programme

BB2

BB2 Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning)

1.1. Activity Code

CA5: Buddy Programme

1.2. Building Block on which the activity is based

- ☑ Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning) (BB2)

1.3. Activity or Tool

- ☑ Activity

1.4. Type of Activity or Tool

- ☑ Activity for Informal Learning
- ☑ Other

1.5. Field of improvement

- ☑ Employee Sensitisation on the Importance of Learning

1.6. Scope of the activity

To introduce new employees to the workplace and workplace culture, as well as to put them in a pathway of workplace learning.

1.7. Who should lead the activity?

The HR department or a manager/the general manager in smaller organisations/companies that will be responsible for “matching” buddies with new employees and monitoring the process.

1.8. Who should attend the activity?

All new employees in an organisation/company as well as employees who have been working in the organisation/company for more than 2 years and will take the role of *buddies*. In the best case, the latter should be volunteers willing to introduce new colleagues to the organisation/company’s environment and culture, including its learning culture.

1.9. Description of the activity

A *Buddy Programme* is a system for onboarding and orientation of new employees as well as for knowledge sharing. The buddy is an employee with adequate work experience who guides new colleagues during their first months in the job. This system should not only encourage new employees to dive into the challenges of their job position, but also to share knowledge from their previous job positions and their education.

Goal

This activity should facilitate the first weeks/months of new employees in the organisation/company.

How to Do it

At the beginning of the year (or at a predefined time every year) existing employees are chosen/are volunteering for the *buddy* position. It is important that these employees work for the organisation/company for at least two years. Buddies should, on the one hand, introduce new colleagues to the organisation/company (processes, procedures, culture, etc.) and the workplace learning environment, and on the other hand, to encourage new employees to share knowledge from their prior engagements and introduce it to their new workplace.

During the "buddying", it is necessary for the *buddy* and the new colleague to be given the opportunity for having several meetings. Especially at the beginning of the activity, the onboarding process definitely requires much time from both sides.

1.10. Duration and frequency of implementation of the activity

From the time an employee starts working for the organisation/company up to 3-6 months, depending on the progress made. It is at the discretion of the *buddy* (and the manager/HR manager monitoring the process) to decide the exact duration of the "buddying".

Once for each new employee and ideally, once for each experienced employee (*buddy*).

1.11. Minimum and maximum number of participants in the activity (if applicable)

1 new employee and 1 experienced employee (*buddy*). Also, 1 manager/HR manager for "matching" the employees and monitoring the process.

1.12. Prerequisites for participating in the activity (if applicable)

The *buddy* should be working in the organisation/company for at least 2 years. No special competences are required.

1.13. Resources for the activity

Buddy Programme – List of Potential Buddies (Annex 1)
Buddy Programme Meetings Record (Annex 2)
Buddy Programme Evaluation Questionnaire – New Employees (Annex 3)
Buddy Programme Evaluation Questionnaire – Buddy-Employees (Annex 4)
Buddy Programme Evaluation Report (Annex 5)

The most important resource for this activity is time. It is necessary to consider a few hours per month for the *buddy* and the new employee to meet up.

1.14. Instructions for implementing the activity

Step-by-Step Process

• Preparation of a list of potential *buddies* at the beginning of the year (e.g., through a call).

• Delegation to one person (e.g., from the HR department) of “matching” the buddies with new employees (*Buddy Programme – List of Potential Buddies*, Annex 1).

• Announcing of the assignment to the buddy and asking for his/her consent for the “buddying” process to start.

• Implementation and documentation of the “buddying” process (*Buddy Programme Meetings Record*, Annex 2):

1st month (Weeks 1-4): short daily meetings (around 15 minutes each) during Week 1 to get the new colleague accustomed with the new working and learning environment. **Weeks 2-4:** meetings (around 15 minutes each) twice a week for checking on the new employee (if there are any problems, needs, etc.). During this month (weeks 1-4), at least one meeting per week should be recorded (*Buddy Programme Meetings Record*, Annex 2).

2nd month (Weeks 5-8): one meeting per week and at least one informal feedback talk (meeting) about the first few weeks in the new position (around 15 minutes each). During this month (weeks 5-8), at least one meeting per week should be recorded (Annex 2).

3rd-6th months (Weeks 9-20): the frequency of meetings (around 15 minutes each) depends on the new colleague and how this person is fitting into the new environment. During months 3-6 (weeks 9-20), all the meetings taking place between the “buddies” should be recorded (Annex 2). For the final meeting, 4 open-ended questions have to be posed and discussed between the *buddy* and the new employee (Annex 2, final page).

Responsibilities/Tasks of the *Buddy*:

• Introducing the new employee to colleagues.
• Explaining the organisation/company's culture (processes, procedures, policies, etc.).
• Showing the new employee around.
• Introducing the new employee to the workplace learning culture and the learning activities implemented within the organisation/-company.
• Checking on the new employee regularly and being open to comments and constructive feedback.
• Providing advice and constructive feedback to the new employee.
• Documenting the whole process (Annex 2) and particularly the final meeting (Annex 2, last two pages).
• Deciding on when to complete the "buddying" process after the third month (the maximum duration of the activity is six months).

- Documentation of the final meeting and evaluation of the learning achieved from the activity based on the guiding questions provided (Annex 2, last two pages).

- Evaluation of the *Buddy Programme* by the new employee (Annex 3).

  After completing the Buddy Programme, provision of feedback on the whole activity is requested by the new employee (use the evaluation questionnaire provided as guidance: *Buddy Programme Evaluation Questionnaire – New Employees,* Annex 3 and add any other questions, if necessary). Alternatively, the collection of feedback can be carried out through an interview with the use of the questions of the above-mentioned questionnaire, conducted by either the buddy or the manager/HR manager monitoring the process.

- Evaluation of the *Buddy Programme* by the buddy (Annex 4).

  After completing the Buddy Programme, provision of feedback on the whole activity is requested by the buddy, too (*Buddy Programme Evaluation Questionnaire – New Employees*, Annex 4).

- Development of an evaluation report for the *Buddy Programme* (Annex 5).

  Based on the results collected by the two evaluation reports as well as by the questions posed to the new employee in the final meeting, an evaluation report is developed by the buddy or the manager/HR manager for the activity (*Buddy Programme Evaluation Report*, Annex 5).

  The “buddying” process should be monitored by the manager/HR manager that made the “match”, who can intervene and provide advice, if necessary. The *buddy* is also responsible for monitoring the process and ensuring its smooth implementation.

Documentation

Documentation should be kept through meeting records (*Buddy Programme Meetings Record*, Annex 2). Feedback on the final meeting should be collected in the same document (Annex 2, last two pages), using the predefined questions.

During the whole process, the *buddy* is required to document all meetings with the new employee. It is sufficient for the *buddy* to mention only the date, time, and duration of each meeting, but it is recommended that the “Progress Made” and the “Goals for the Next Meeting” are documented too for monitoring purposes. Detailed information is not required, unless serious issues are identified during the onboarding.

1.15. Evaluation (Reaction) - How do you evaluate whether the participants are happy with the activity?

In the end of the “buddying” process, new employees are required to fill out the *Buddy Programme Evaluation Questionnaire – New Employees* (Annex 3) and the *buddies* are required to fill out the *Buddy Programme Evaluation Questionnaire – Buddies-Employees* (Annex 4).

The aggregate results collected are included in the *Buddy Programme Evaluation Report* (Annex 5).

1.16. Evaluation (Learning) - How do you evaluate whether the participants have learnt new things from the activity?

In the final meeting of the 3-6-month process, the new employee is asked about the learning achieved through the activity, with the use of 4 questions included in the last section of the *Buddy Programme Meetings Record* (Annex 2). Additional information on the learning of the new employees can be extracted from the comments provided in the end of each meeting as well as by the feedback provided in the final meeting (see respective columns in the *Buddy Programme Meetings Record* (Annex 2)).

A summary of the new employees’ views on their learning from the activity are included in the *Buddy Programme Evaluation Report* (Annex 5).

1.17. List of annexes

Annex 1: Buddy Programme – List of Potential Buddies
Annex 2: Buddy Programme Meetings Record
Annex 3: Buddy Programme Evaluation Questionnaire – New Employees
Annex 4: Buddy Programme Evaluation Questionnaire – Buddy-Employees
Annex 5: Buddy Programme Evaluation Report

1.18. List of documentation for the certification

1. Buddy Programme – List of Potential Buddies
2. Buddy Programme Meetings Records (including feedback on the learning of the new employees in the last section)
3. Buddy Programme Evaluation Questionnaires – New Employees
4. Buddy Programme Evaluation Questionnaires – Buddy-Employees
5. Buddy Programme Evaluation Report

CA6: E-Learning Courses

BB2

BB2 Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning)

1.1. Activity Code

CA6_E-LearningCourses

1.2. Building Block on which the activity is based

- ☑ Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning) (BB2)

1.3. Activity or Tool

- ☑ Activity

1.4. Type of Activity or Tool

- ☑ Learning Tool

1.5. Field of improvement

- ☑ Employee Transversal Skills
- ☑ Employee On-the-Job Skills

1.6. Scope of the activity

This activity aims to meet specific training needs of employees through their participation in e-learning courses. After conducting a training needs' analysis and defining learning objectives, employees are directed to acquire knowledge through the use of technology and electronic media. This provides them with the opportunity to make use of self-paced learning and choose their own learning environment.

1.7. Who should lead the activity?

The Human Resources department or the Managing Director.

1.8. Who should attend the activity?

All the employees of the organisation/company.

1.9. Description of the activity

The most important thing to consider before making a decision on taking an e-learning course is to analyse your learning needs and conclude on if they can be covered by a specific learning programme. The next step is to choose the appropriate e-learning platform and the appropriate training provider.

1.10. Duration and frequency of implementation of the activity

1 day – 1 month for each e-learning course. The courses can be structured in modules (1 day – 1 month).

1.11. Minimum and maximum number of participants in the activity (if applicable)

A minimum of 15% of the personnel of the organisation/company covering part of their training needs through e-learning courses (for the activity to be considered for the "Learning Workplace" certification).

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

- Training Needs Analysis Results Form (Annex 1)
- E-Learning Needs and Courses Matching Tool (Annex 2)
- E-Learning Action Plan (incl. for Budget) (Annex 3)
- Hints & Tips for E-Learning (Annex 4)
- E-Learning Course Certificate (Annex 5)
- E-Learning Evaluation Questionnaire (Annex 6)
- Learning Progress Evaluation Questionnaire (Annex 7)
- Computers
- Good Internet connection

1.14. Instructions for implementing the activity

Step 1: Conduct a training need analysis (with the use of any available activity or tool) (Annex 1).

Step 2: Ensure that the learning needs can be satisfied through e-learning.

Step 3: Choose the right training tools and courses.

Step 4: Produce a budget and an action plan (Annex 3). After you have set a goal and selected the tools, it is much easier to estimate your future e-learning investments. The expense sheets should include not only the cost of the e-learning software/course, but also, in some cases, buying new computers. After the budget is established, it is time to create an action plan (. Break down the current goal (to launch e-learning) into clear, actionable steps and set deadlines for each step.

Step 5: Motivate and support employees to access e-Learning courses. Provide flexible working conditions to facilitate e-learning. Also, provide the employees with advice for effective e-learning (Annex 4).

Step 6: Monitor the use of e-learning for the year (Annex 2).

Step 7: Evaluate the e-learning course and the progress made through e-learning with the use of evaluation tools (Annexes 6 and 7).

Step 8: Provide the employees who have completed e-learning courses with certificates of course completion, which can also serve as an incentive for them (Annex 5).

1.15. Evaluation (Reaction) - How do you evaluate whether the participants are happy with the activity?

Through the *E-Learning Evaluation Questionnaire* (Annex 6), evaluating e-learning at module/session, course, and delivery level.

1.16. Evaluation (Learning) - How do you evaluate whether the participants have learnt new things from the activity?

Through the *Learning Progress Evaluation Questionnaire* (Annex 7), in which trainees are asked to answer questions on their learning achievements after completing the course.

1.17. List of annexes

Annex 1: Training Needs Analysis Results Form (based on the selected and used TNA activity or tool)
Annex 2: Annual E-Learning Needs and Courses Matching Tool
Annex 3: E-Learning Action Plan (incl. for Budget)
Annex 4: Hints & Tips for E-Learning
Annex 5: E-Learning Course Certificate
Annex 6: E-Learning Evaluation Questionnaire
Annex 7: Learning Progress Evaluation Questionnaire

1.18. List of documentation for the certification

1. Training Needs Analysis Results Forms (based on the selected and used activity or tool)
2. Annual E-Learning Needs and Courses Matching Tool
3. E-Learning Action Plans (incl. for Budget)
4. Hints & Tips for E-Learning
5. E-Learning Course Certificate
6. E-Learning Evaluation Questionnaires
7. Learning Progress Evaluation Questionnaires

CA7: Mentoring

BB2

BB2 Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning)

1.1. Activity Code

CA7: Mentoring

1.2. Building Block on which the activity is based

- ☑ Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning) (BB2)

1.3. Activity or Tool

- ☑ Activity

1.4. Type of Activity or Tool

- ☑ Learning Tool

1.5. Field of improvement

- ☑ Employee Transversal Skills
- ☑ Employee On-the-Job Skills

1.6. Scope of the activity

Lifelong learning, professional and personal skills' development, etc. can be supported by mentoring that focuses on areas such as workplace "acculturation", priority setting, networking, career planning and counselling related to the individual's (mentee's) identified goals towards advancement in their field. The mentoring activity can be used as a follow up to other activities, such as the *Buddy Programme*.

1.7. Who should lead the activity?

The Human Resources department that is responsible to assign mentees to mentors.

1.8. Who should attend the activity?

Any employee of the organisation/company can attend. Depending on their experience and the department at which they work, employees can take the role of mentors or mentees.

Senior or higher-level employees should undertake to prepare junior or lower-level employees to move ahead in their careers through mentoring.

New employees are suggested to attend the *Buddy Programme* activity instead.

1.9. Description of the activity

The mentoring process for career advising and identification of learning needs should take place in groups of 1 mentor and 1-2 mentees and follow the steps below:

1) Initial Session

Mentors:

- Introduce the mentees to the purpose of mentoring activities and the relationship between a mentor and a mentee
- Present the format of the mentoring sessions and how these will work
- Explain to what they will commit as well as their role
- Explain what is expected from the mentees and their role

2) Mentoring Sessions (Regular Meetings with Mentors)

Mentors:

- Review the experience of the mentees
- Identify career and learning objectives for the mentees
- Provide feedback to the mentees
- Identify strengths and achievements of the mentees
- Identify areas of career (and personal) development of the mentees
- Explore options of learning opportunities for the mentees
- Provide coaching to the mentees on required areas
- Discuss professional issues with the mentees
- Agree on needs of the mentees for support in career and learning objectives
- Set goals with the mentees for future actions in career planning
- Create opportunities for the mentees to gain learning experience

3) Concluding Session

Mentors:

- Identify when the mentor-mentee relationship reaches a natural end
- Review and sign off objectives
- Help the mentees identify their next steps (possibly, also their assignment to a new mentor)
- Self-reflect and review the effectiveness of the relationship, while the same is being done by the mentees

1.10. Duration and frequency of implementation of the activity

Each mentoring session should have a duration of 30 minutes to 1 hour, depending on the discussion topic.

Mentoring sessions should be held regularly, e.g., once a month, for a period of at least 6 months, depending on the goal set for the activity. Throughout a year, at least 6 sessions must be held.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Each mentor should be assigned 1-2 mentees maximum.

1.12. Prerequisites for participating in the activity (if applicable)

A mentor should have the following attributes:

• Working experience (adequate and/or related to the work area of the mentee)
• Motivation to succeed
• Willingness to share experience
• Time management skills. A good mentor must be talented/skilled at time management to commit enough time to make mentoring worthwhile.
• Good organisational skills
• Good communication skills
• Positive attitude
• Respect
• Honesty
• Confidence

A mentee should have the following attributes:

• Being in need to be guided (new at the job; being assigned new tasks etc.)
• Motivation to succeed
• Willingness to learn
• Time management skills. A good mentee must be talented/skilled at time management to commit enough time to make mentoring worthwhile.
• Good communication skills
• Positive attitude
• Respect
• Honesty
• Confidence

1.13. Resources for the activity

- Mentoring Agreement (Annex 1)
- Mentoring Action Plan (Annex 2)
- Mentoring Evaluation Questionnaire (For Mentees) (Annex 3)
- Mentoring Evaluation Questionnaire (For Mentors) (Annex 4)
- A quiet room/space for mentoring sessions' implementation

1.14. Instructions for implementing the activity

Goal – The mentor gets the mentee to focus on the future and on what the MENTEE wants to achieve as an individual.

Current Situation – The mentor questions to help the mentee realise where they are now. If the mentor works with the individual directly, they may need to give feedback on their actual performance. If this is not the case, the mentor should encourage the individual to get feedback on their performance from their direct line manager. This will help the mentee to identify their current working performance.

Options – The mentor can help the mentee to identify what different options are open to them and ask questions to help them explore the possibility of realisation each of these options. The mentor can also share their own experiences, if the mentee struggles to identify sufficient options.

Way Forward – The mentor encourages the mentee to elaborate on an action plan for the mentoring which they co-design, and they help them to set SMART objectives: objectives that are specific, measurable, achievable/attenable, realistic, and time-bound.

Managing the Sessions – The mentor should take on the role of a facilitator during the sessions using questions and a non-directive, non-judgemental approach (a helpful model for coaching could be, for example, the GROW model).

A session can take place on one or more of the following purposes:

- Reviewing and identifying the mentee's work experience
- Helping the mentee to identify individual strengths and areas for development
- Discussing with the mentee professional and work issues
- Agreeing with the mentee on what support is required for them
- Exploring the options open to the mentee
- Coaching of the mentee on improving specific skills
- Supporting the mentee to set achievable, realistic, and stretching action plans

However, mentoring sessions is not the only form of contact with the mentee. Telephone calls, e-mails and brief on-the-job discussions can be also part of the process, but the mentor should have an agreed number of scheduled sessions with the mentee set, fitting around the action plan of the mentee and around specific points for their development.

Making the Sessions Work

1. The sessions should have a clear purpose. Before the session, the structure and time parameters should be considered. These should be agreed during the initial session, when the mentor contracts with the mentee (*Mentoring Agreement*, Annex 1). A clear structure and purpose will be the best and most effective use of the time of both parties (***Mentoring Action Plan***, Annex 2, Section A – Mentoring Information).

2. The content of the meetings should be decided beforehand. There should be a balance between looking back and reviewing the mentee experiences and reviewing if objectives set have been met or, if not, why they have not. There should also be a balance between discussing current issues and thinking about the future and ensuring that the mentee sets realistic objectives for their action plan.

Shorts descriptions of the content of the 6 main mentoring sessions should be provided from the beginning of the activity (*Mentoring Action Plan*, Annex 2, Section 2 – Mentoring Session's Log) and can be enriched before each session, based on the results of the session that precedes.

3. The dates and time frames set should be adhered. At least for the minimum 6 mentoring sessions that are obligatory for the activity, the scheduling should be done from the beginning (Mentoring Action Plan, Annex 2, Section 2 – Mentoring Session's Log). It is easy to let the day job get in the way, but the parties should try to focus on the benefits to everyone (including the organisation/-company) of engaging in this process. The mentoring should be given the priority it requires to be successful.

4. The sessions should be an enjoyable experience for both the mentor and the mentee.

Ending the Mentor-Mentee Relationship

It is important to consider how the mentoring relationship will end. The mentor should discuss the reasons for ending the relationship with the mentee. In certain situations, the end date is agreed in the initial meeting, but it is not always possible to be able to conclude on a specific end date from the beginning. The reasons for ending a mentoring relationship may vary:

• The relationship has achieved its objective.
• The mentor feels that the mentee has become confident and is ready to move on.
• The mentor has put much effort, but the mentee is not responding to mentoring.
• The activity is concluding.
• The relationship is not working successfully and both parties wish to move on.

It is useful and a good practice for the mentor and mentee to revisit the original goals and objectives, and compare them with actual outcomes. This allows both parties to review what progress has been made and to acknowledge what has been achieved. It is useful to encourage the mentee to find another mentor for the next stage of their "journey" and individuals that the mentee may like to approach can be suggested by the mentor. The mentee should take time to evaluate how they feel they have developed during the relationship and what lessons they have learnt.

At the end of the activity, a mentoring summary (*Mentoring Action Plan*, Annex 2, Section 1 – Mentoring Information) has to be provided, including the positive aspects of the mentoring, the goals achieved, possible next steps, challenges and barriers and how they were overcome, etc.).

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

By using the *Mentoring Evaluation Questionnaire* (for Mentors/-Mentees) (Annexes 1 and 2), the mentors and mentees can give feedback on the success of the mentoring activity as whole (after the completion of all the mentoring sessions) and if they are satisfied with the results.

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

The learning achieved from the activity can be evaluated through the comments provided by the mentor in the Mentoring Action Plan (Annex 2, Section B – Mentoring Sessions' Log) for each mentoring session. If progress is recorded from session to session and the learning objectives set are met, the learning evaluation of the activity will be high.

1.17. List of annexes

Annex 1: Mentoring Agreement
Annex 2: Mentoring Action Plan (incl. Sessions Log)
Annex 1: Mentoring Agreement
Annex 2: Mentoring Action Plan (incl. Sessions Log)

1.18. List of documentation for the certification

1. Mentoring Agreements
2. Mentoring Action Plans
3. Mentoring Evaluation Questionnaires – For Mentees
4. Mentoring Evaluation Questionnaires – For Mentors

CA8: Learn 4 Free

BB2

BB2 Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning)

1.1. Activity Code

CA8: Learn 4 Free

1.2. Building Block on which the activity is based

- ☑ Ensure that adult learning in the workplace puts learners on a lifelong learning pathway (supported by guidance systems and a validation of prior learning) (BB2)

1.3. Activity or Tool

- ☑ Activity

1.4. Type of Activity or Tool

- ☑ Skills' Anticipation Tool (including for long-term goals)

1.5. Field of improvement

- ☑ Organisation Learning Strategy

1.6. Scope of the activity

One of the principal reasons that organisations/companies do not offer many training opportunities to their employees is the cost of the trainings.

However, the free-of-charge offer of training courses (provided on online platforms but also with physical presence in some cases) is nowadays huge, which can be of good quality, if they are carefully selected.

Since anyone with basic digital literacy skills can freely access this type of trainings on the subject of their choice, this activity is dedicated to make it easier for organisations/companies to target and promote free trainings relevant to their interests and areas of operation to their employees.

In this way, the organisation/company can encourage its employees to get trained at no cost. In return, they may consider offering some kind of compensation to employees: time off, increased promotion possibilities etc.

1.7. Who should lead the activity?

Ideally, the Human Resources department in collaboration with the management of the organisation/ company. Alternatively, a department manager assigned this task.

1.8. Who should attend the activity?

All the employees of the organisation/company, independent of hierarchy level or job description.

1.9. Description of the activity

The activity is based on establishing a systematic process for searching, selecting and, incorporating free training of the interest of the organisation/company into its training offers to employees.

There are thousands of free training courses on the Internet, usually offered by universities (e.g., Harvard University, Oxford University, etc.) or technology companies (e.g., Google, Microsoft or Facebook). Trainings can be found on all types of topics: foreign languages, programming languages, office software, image processing, psychology, robotics, marketing, social networking, economics, environment, etc.

The organisation/company (e.g., the HR department, a department manager, etc.) should first make a search for free (online) training courses through a selection process on predefined criteria (topic, duration, provider, etc.) and then, offer to employees those courses in a structured way, encouraging their participation in the activity and providing any kind of support.

Finally, each training course attended as well as the activity as a whole (provision of free training courses) should be assessed.

1.10. Duration and frequency of implementation of the activity

Each training course starts and ends according to the course description. Trainings can be attended individually at any time of the year, depending on the schedule and work load of the employees.

Before starting the activity, some time for preparation is needed; also, some time is needed after the completion of each training course and the end of the activity as a whole for evaluation purposes:

· 1 week to create an annual record of free training courses.
· 1 week to inform about the activity, receive requests for participation in the training courses (and update the annual record), and ask for necessary support, if needed.
· 1 week after the completion of each training course to collect the evaluation questionnaires for the course.
· 1 week after the end of the whole activity for the analysis of the data collected through the evaluation questionnaires and the development of an annual report on the free training offers of the year.

1.11. Minimum and maximum number of participants in the activity (if applicable)

A minimum of 15% of the personnel of the organisation/company covering a part of their training needs through free training courses online or with physical presence (for the activity to be considered for the “Learning Workplace” certification).

1.12. Prerequisites for participating in the activity (if applicable)

Availability of employees to participate in trainings (to be confirmed by the supervisor/manager of each employee).

1.13. Resources for the activity

- Learn-4-Free Training Offers Record and Participant List (Annex 1)
- Learn-4-Free Training Course Evaluation Questionnaire (Annex 2)
- Learn-4-Free Activity Annual Report (Annex 3)

For suggesting training courses to employees, any training needs’ analysis tool of the organisation/company can be used or templates of the E-Learning Courses activity to conclude on their actual training needs.

Also, internal communication tools will be needed to inform the employees about the activity: e-mail, internal bulletins/newsletters, etc.

1.14. Instructions for implementing the activity

Before starting the activity

HR/other department managers periodically carry out research for publicly available free training offers (training courses on e-learning platforms and elsewhere) and select the activities that are of interest to the organisation/company, which they register on the *Learn-4-Free Training Offers Record* and Participant List (Annex 1). If the number of identified training courses is large, the most promising offers are selected (minimum 10, so as for employees to have many options). It is also recommended for the organisation/company to sing up for newsletters that promote free training offers, which can enrich the online search results. In order to have a more targeted search, department managers and supervisors can be asked to state the training needs of their departments or the results of the training needs' analysis tools used by the organisation/company can serve as a basis for the online search.

Start of the activity (provision of free training courses)

The completed record of free training courses is shared with the staff (e.g., via e-mail, an internal learning platform, bulletins/newsletters, etc.), along with a call for employees to take part in free trainings. The possible "compensation" for employees who decide to participate in offered courses should be indicated in the record or can be documented in a 1-to-1 agreement between the employee and the manager/supervisor. On this record, the employees state their interest in participating in one or more of the registered courses and can also ask for support, if needed.

If the employees need assistance when attending a training course, the HR department or the department(s) coordinating this activity are responsible to "buddy up" staff members to provide support or one or more employees can be assigned this task based on their background and the course topic (for example, the *Buddy Programme* or *Mentoring activities* can be used for this). Also, the department or managers responsible for the activity monitor regularly how the trainings go.

Finalisation and evaluation of the activity

1. After the completion of a training course, the participating employees need to prove that they have met all the requirements of the course by providing a certificate of attendance and successful completion of the course (or any other evidence for this offered by the course provider) to the HR department and/or the manager/supervisor).

2. After the employees' full participation in the training course is confirmed, the *Learn-4-Free Training Course Evaluation Questionnaire* (Annex 2) is sent to them to assess the specific course.

3. For the participants to receive the agreed "compensation", both the certificate of attendance and successful completion of the training course and the evaluation questionnaire for the course have to be at the disposal of the responsible department(s).

4. At the end of the year, the department(s) responsible for the activity or the management develop an annual report on the free training offers of the year (*Learn-4-Free Activity Annual Report*, Annex 3), including conclusions on how successful the activity was and recommendations for the next year.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

Through an evaluation questionnaire which is sent to the employees every time a training course they attend is completed (*Learn-4-Free Training Course Evaluation Questionnaire*, Annex 2) as well as through the conclusions in the annual report on the free training offers of the organisation/company (*Learn-4-Free Activity Annual Report*, Annex 3).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

The potential learning of employees can be documented through their attendance in training courses that correspond to their identified learning and training needs (e.g., as indicated with the use of training needs' analysis tools before their participation in the activity; the more training courses they attend in areas they need to get improved, the more their potential learning can be), and can be proven through observation by their manager/supervisor who can come to conclusions on whether the training has helped them in practice.

1.17. List of annexes

Annex 1: Learn-4-Free Training Offers Record and Participant List
Annex 2: Learn-4-Free Training Course Evaluation Questionnaire
Annex 3: Learn-4-Free Activity Annual Report

1.18. List of documentation for the certification

1. Learn-4-Free Training Offers Record and Participant List
2. Learn-4-Free Training Course Evaluation Questionnaires
3. Learn-4-Free Activity Annual Report
4. Training needs' analysis data (from TNA tools used by the organisation/company) proving the need for employees to participate in specific training courses
5. Certificates or any other evidence of successful completion of training courses (copies)

CA9: Draw and Analyse your SWOT

BB4

BB4 Ensure effective coordination between all stakeholders and agree on roles and responsibilities

1.1. Activity Code

CA9: Draw and Analyse your SWOT

1.2. Building Block on which the activity is based

- ✓ Ensure effective coordination between all stakeholders and agree on roles and responsibilities (BB4)

1.3. Activity or Tool

- ✓ Tool

1.4. Type of Activity or Tool

- ✓ Other

1.5. Field of improvement

- ✓ Organisation Learning Strategy

1.6. Scope of the activity

This activity enables employees to identify their strengths and weaknesses or the strengths and weaknesses of their job position/department as well as the opportunities for learning in the workplace and all relevant threats (that prevent learning) in relation to the identified strengths and weaknesses.

More specifically, it helps the different department managers or the Training and Development or HR manager to:

· check the needs for adult learning in the workplace.

· assess whether the employees of the organisation/company bear the necessary hard and soft skills.

· develop a learning strategy to address the identified needs through suggested solutions (opportunities), in order to cope with the threats preventing learning in the workplace.

1.7. Who should lead the activity?

The department managers or the Training and Development or HR manager.

1.8. Who should attend the activity?

All the employees of the organisation/company.

1.9. Description of the activity

Employees in sessions of maximum 10 participants have to fill out the Draw and Analyse Your SWOT table with the supervision of a member of the management team. The sessions can be conducted either at department level or not at organisation/company level, depending on the size of the workplace.

First, this will allow employees to realise their learning needs by identifying their strengths and weaknesses as well as the learning opportunities for them and threats to their learning in the workplace.

Secondly, it will allow the department manager/Training and Development/HR manager to analyse the learning needs identified and re-adapt the learning strategy of the organisation/company in order to tailor it to the current learning needs of the staff and cross check that the organisation/company currently "gathers" the necessary hard and soft skills (i.e., that the different job positions match the people).

1.10. Duration and frequency of implementation of the activity

1 hour (2 x 30 minutes: session for filling out the table and debriefing session).

1 day for the department manager/Training and Development/HR manager to analyse the content of the tables filled out by all the employees of the group and come to conclusions that will be taken into consideration for adapting the organisation/company's learning strategy to address the employees' weaknesses and face relevant threats.

The activity should be repeated every 6 months for new learning gaps to be identified.

1.11. Minimum and maximum number of participants in the activity (if applicable)

All the employees of the organisation/company should attend the activity. Depending on the size of the workplace and the number of employees, sessions with 10 employees maximum should be organised.

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

- Draw and Analyse your SWOT Participant List (Annex 1)
- Draw and Analyse your SWOT (Annex 2)
- Draw and Analyse your SWOT Evaluation Questionnaire (Annex 3)
- Draw and Analyse your SWOT Results Report (Annex 4)
- Draw and Analyse your SWOT Evaluation Report (Annex 5)

1.14. Instructions for implementing the activity

First, a group of maximum 10 employees is created at department/organisation/company level, depending on the size of the workplace and/or the target of the activity (groups of employees from different departments can bring out other kinds of results).

The activity should be moderated by a member of the management team, who will give instructions to the participants at the beginning of the first session (30 minutes) and will facilitate the discussion during the second session (30 minutes). At this stage, the *Draw and Analyse your SWOT Participant List* should be filled out by the employees (Annex 1).

In the first session, the participants will have 30 minutes to fill out the Draw and Analyse your SWOT table (Annex 2, all four cells):

STRENGTHS: What are my strengths with regards to my job position in terms of knowledge, skills, and competences?

WEAKNESSES: What are my weaknesses with regards to my job position? What kind of knowledge, skills, and competences do I lack and I should acquire?

OPPORTUNITES: What opportunities do I have which can help cover my learning gaps? Are there any internal opportunities? What about external opportunities? Which methods/solutions/options could I suggest for my learning? What is the time needed and the cost?

THREATS: Do I see any threats to my job position deriving from the identified learning gaps? Do I see any threats from my employer's side related to investing in my learning?

As soon as the first session ends, a debriefing with the entire group will follow with a duration of 30 minutes, in which clarifying questions and reflection on the tables' content will be asked.

Optionally (but highly recommended), the management representative can subsequently take some minutes with each participant to debrief and analyse their own table.

At the end of the activity, the moderator will collect all tables and dedicate one day to analyse the collected data and develop a report (Draw and Analyse your SWOT Results Report, Annex 4), including a summary of the results, conclusions, and suggestions for adaptation of the learning strategy of the organisation/company, in order for it to be in alignment with the identified learning needs of the employees.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

An evaluation questionnaire will be completed by the participants on their satisfaction with the activity (Draw and Analyse your SWOT Evaluation Questionnaire, Annex 3) and an evaluation report will be developed on the collected results (Draw and Analyse your SWOT Evaluation Report, Annex 5).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

If the participants become aware of their strengths, weaknesses, learning opportunities, and threats to learning through the activity, they will be in a position to easily and effectively complete the *Draw and Analyse your SWOT* table the next time the activity will take place, that is, in 6 months' time.

1.17. List of annexes

Annex 1: Draw and Analyse your SWOT Participant List
Annex 2: Draw and Analyse your SWOT
Annex 3: Draw and Analyse your SWOT Evaluation Questionnaire
Annex 4: Draw and Analyse your SWOT Results Report
Annex 5: Draw and Analyse your SWOT Evaluation Report

1.18. List of documentation for the certification

1. Draw and Analyse your SWOT Participant List
2. Draw and Analyse your SWOT Tables
3. Draw and Analyse your SWOT Evaluation Questionnaires
4. Draw and Analyse your SWOT Results Report
5. Draw and Analyse your SWOT Evaluation Report

CA10: Learning Agreement

BB4

BB4 Ensure effective coordination between all stakeholders and agree on roles and responsibilities

1.1. Activity Code

CA10: Learning Agreement

1.2. Building Block on which the activity is based

- ☑ Ensure effective coordination between all stakeholders and agree on roles and responsibilities (BB4)

1.3. Activity or Tool

- ☑ Tool

1.4. Type of Activity or Tool

- ☑ Skills' Anticipation Tool (including for long-term goals)

1.5. Field of improvement

- ☑ Organisation Learning Strategy

1.6. Scope of the activity

Adult learning in the workplace involves many stakeholders, who have specific characteristics and capacity that can stimulate adult learning. To make the most of this capacity, stakeholders need to establish collaborative agreements.

1.7. Who should lead the activity?

The Human Resources Department in collaboration with the management of the organisation/company.

1.8. Who should attend the activity?

· Middle management and employees who participate in learning activities organised by stakeholders.
· Middle management and employees who are able to provide training for stakeholders' activities.
· Stakeholders' staff or students who participate in internship programmes in the Learning Workplace.

1.9. Description of the activity

The purpose of a Learning Agreement is to "provide a transparent and efficient preparation of the exchange to make sure that students receive recognition for the activities successfully completed abroad"
(Erasmus+, https://erasmus-plus.ec.europa.eu/resources-and-tools/mobility-and-learning-agreements/learning-agreements).
This tool aims to foster the collaboration of Learning Workplaces with stakeholders involved in training activities, through the signature of training agreements.

The field of collaboration may take the form of any activity related to the aim of both entities and may refer, among others, to:

· Granting of training aids
· Involvement of professionals in the teaching activities
· Participation of professionals in the co-direction of students' projects
· Internships for students or for stakeholders' staff

A model of training agreement is provided. It is based in an agreement among a company and a university, but it may be adapted to other types of organisations, such as public agencies, companies, training providers, trade unions, sectoral organisations, technologic institutes, public employment services etc.

Other templates for different types of agreements (e.g., scholarship, internships etc.) could also be included as additional Annexes.

1.10. Duration and frequency of implementation of the activity

The duration of the agreement shall be fixed by the entities signing the agreement. It can be also set to be automatically renewed.

It is suggested an annual review and/or update of terms, if needed.

The agreement could also specify the duration of the covered activities. For instance:

· Internships of 3-6 months
· A range for teaching hours for professionals

1.11. Minimum and maximum number of participants in the activity (if applicable)

Not Applicable

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

• Learning Agreement Example (Annex 1, which can change depending on the case)
• Learning Agreements Record
• Learning Agreement – Learner Feedback Form (Evaluation Questionnaire)
• Internal communication tools: e-mail, newsletters, internal bulletins etc.

1.14. Instructions for implementing the activity

As a first step, the Learning Workplace should identify possible partners for a training agreement, according to its interests. If this selection activity is complex, a tool or activity aimed at decision making may help.

Once potential partners have been selected, they will be invited to enter into an agreement and a meeting will be held to establish the scope and the field of the collaboration.

The agreement should include a mechanism for managing and monitoring the activities, such as a joint committee, which will make common decisions and ensure the quality of the training activities.

The main document to support the activity will be the Learning *Agreement X* (for example, Annex 1). Other documents such as minutes of the meetings, a record of the activities carried out in collaboration with the other entity, or a record of the participants in the common activities can be kept (see last page of Annex 1), depending on the case. Also, the organisation/company should keep a record of all its ongoing learning agreements on an annual basis (*Learning Agreements Record*, Annex 2).

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

The renewal of the agreements and the minutes of the meetings will be the source of such information.

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

The renewal of the agreements and the minutes of the meetings will be the source of such information.

Three months from the signing of the learning agreement, the two stakeholders (contributing parties) are called to assess the activity and the effectiveness of their agreement. This will be carried out by filling out an evaluation questionnaire (Learning Agreement – Learner Feedback Form, Annex 3).

1.17. List of annexes

Annex 1: Learning Agreement Example
Annex 2: Learning Agreements Record
Annex 3: Learning Agreement – Learner Feedback Form (Evaluation Questionnaire)

1.18. List of documentation for the certification

1. Signed Learning Agreements
2. Minutes of Meetings (depending on the case)
3. Records of Activities carried out in collaboration with the other entity (depending on the case)
4. Participant Lists/Records of Participants in common learning activities (for example, see last page of Annex 1)
5. Learning Agreement – Learner Feedback Forms (Evaluation Questionnaires)

CA11: Inquiry-Based Learning

BB5

BB5

Communicate about adult learning in the workplace using the language of those who need to be encouraged

1.1. Activity Code

CA11: Inquiry-Based Learning

1.2. Building Block on which the activity is based

- ✓ Ensure effective coordination between all stakeholders and agree on roles and responsibilities (BB4)

1.3. Activity or Tool

- ✓ Activity

1.4. Type of Activity or Tool

- ✓ System for Strategic Learning (not ad hoc learning)

1.5. Field of improvement

- ✓ Employee Transversal Skills
- ✓ Employee On-the-job Skills

1.6. Scope of the activity

Inquiry-based learning is a form of active learning that starts by posing questions, problems or scenarios. It contrasts with traditional education, which generally relies on the teacher presenting facts and their own knowledge about the subject. The objective of this activity is to provide theemployees with analytical skills, self-directed learning skills, and critical thinking skills through assignments that relate to:

· Identification of information (research)
· Analysis and synthesis
· Proposition of solutions
· Presentation of solutions

1.7. Who should lead the activity?

Managers or supervisors should assign inquiries to their team with specific instructions and timeframe.

1.8. Who should attend the activity?

All employees (preferably once a year).

1.9. Description of the activity

The supervisor will assign a task (problem-based one) to one or more members of a team. This task should at least include the following:

· Research on information
· Analysis of the information and relevant conclusions
· Synthesis of solutions or propositions
· Presentation of the solution to the team (project team, management team etc.)

1.10. Duration and frequency of implementation of the activity

The duration of the activity depends on the type of inquiries and should be agreed together with the manager or the supervisor.

The activity should be repeated every year.

1.11. Minimum and maximum number of participants in the activity (if applicable)

This is an activity that each employee will do either individually or as a member of a team, depending on the inquiry.

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

- Inquiry-Based Learning: Inquiry Form (Annex 1)
- Inquiry-Based Learning: Inquiry Record (Annex 2)
- Inquiry-Based Learning: Inquiry Reflection Log (Annex 3)
- Inquiry-Based Learning: Inquiry Evaluation Questionnaire (Annex 4)

1.14. Instructions for implementing the activity

1. The inquiry should be presented orally but also delivered in writing (Annex 1).

2. The time frame for implementation of the inquiry must be realistic and the opinion of the employee regarding the time frame should be taken into consideration. The objective is not to stress the employee but to provide him/her with an opportunity for creative learning, through the development of different skills.

3. The manager, the supervisor, or a member of the team should be available for support and coaching, if and where needed. The objective is the successful completion of the inquiry.

4. The final result of the inquiry should be a presentation of the process followed and the results of the process, including conclusions and relevant suggestions. For this, a meeting date should be set between the employee or group of employees and the manager/supervisor the day of assignment of the inquiry. On that day, the employee(s) should provide the manager/supervisor with the inquiry form (Annex 1) and also with the reflection log for the inquiry, if s/he/they would like to (Annex 3).

A record of the inquiries delegated throughout the year to the employees should also be kept (Annex 2).

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

Through an evaluation questionnaire which will be handed out to the individuals implementing the inquiry (Annex 4).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

Through a reflection log where the employee will indicate the lessons learnt from the inquiry (Annex 3).

1.17. List of annexes

Annex 1: Inquiry-Based Learning: Inquiry Form
Annex 2: Inquiry-Based Learning: Inquiry Record
Annex 3: Inquiry-Based Learning: Inquiry Evaluation Questionnaire
Annex 4: Inquiry-Based Learning: Inquiry Reflection Log

1.18. List of documentation for the certification

1. Inquiry Forms (Annex 1)
2. Inquiry Records (Annex 2)
3. Inquiry Reflection Logs (Annex 3)
4. Inquiry Evaluation Questionnaires (Annex 4)

CA12: Brainstorming on Training Needs

BB7

BB7 Ensure that workplace learning is tailored to adult learners needs

1.1. Activity Code

CA12: Brainstorming on Training Needs

1.2. Building Block on which the activity is based

☑ Ensure that workplace learning is tailored to adult learners needs (BB7)

1.3. Activity or Tool

☑ Activity

1.4. Type of Activity or Tool

☑ Other

1.5. Field of improvement

☑ Employee Transversal Skills
☑ Employee On-the-job Skills

1.6. Scope of the activity

This is a training needs analysis activity. The scope of the activity is to identify the training and learning needs of the members of an organisation/company, based on the knowledge and competences required for the fulfilment of its activities and operations.

1.7. Who should lead the activity?

The manager of each department or team leaders of the different departments.

1.8. Who should attend the activity?

All members of the management, team leaders, and employees from all the departments of the organisation/company.

1.9. Description of the activity

This is a simple-to-implement activity to identify training and learning needs across the different departments/teams within the organisation/company, using creativity techniques, such as brain-writing, brainstorming etc.

Goal

The goal of the activity is to identify crucial learning gaps for which corresponding training and learning solutions are suggested for each department/team. The gaps can be related to either transversal skills or on-the-job skills.

1.10. Duration and frequency of implementation of the activity

2-3 hours for each session, depending on the number of participants and the discussion progress.

It is suggested that the process is implemented at least once a year, before setting up the training & development strategy of the organisation/company.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Minimum 3 participants.

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

For online sessions: online collaboration tools, brainwriting/brainstorming tools etc.

For face-to-face sessions: flip charts, flip chart paper, cards, sticky notes, marker, pens, glue dots etc.

- Brainstorming on Training Needs Participant List (Annex 1)
- Brainstorming on Training Needs Guide (Annex 2)
- Brainstorming on Training Needs Evaluation Questionnaire (Annex 3)
- Brainstorming on Training Needs Results Report (Annex 4)
- Brainstorming on Training Needs Evaluation Report (Annex 5)

1.14. Instructions for implementing the activity

The brainstorming/brainwriting session should be held at least once a year. It is important that the date of the session is announced well in advance, so that potential participants make sure they have time to attend. The brainstorming/brainwriting sessions should be open to all employees. One person – a team leader, department manager or head of department – should take the role of the facilitator, being responsible for the organisation, preparation, and implementation of the session.

Before the session starts, all the participants have to fill out the Brainstorming on Training Needs Participant List (Annex 1).

Each session should be structured as follows (this is an indicative list; further elements can be added, if necessary):

• Welcome and Introduction – Goal of the workshop

• Brainstorming session: *What are your (individual/team's) training and learning needs?*

• Discussion (using the guiding questions provided in Brainstorming on *Training Needs Guide*, Annex 2):

· *Where do you spot a gap in your knowledge and skills that prevent you from performing your current duties in the best possible way?*

· *Where do you spot a gap in your knowledge and skills that prevent you from supporting the organisation/company to meet its future goals in the best possible way?*

· *How would you prefer to receive training (in classroom, through synchronous electronic learning, through outdoor, experiential activities, etc.) in order for your knowledge and skill gaps to be fulfilled?*

In case of a brainstorming session, the participants discuss what comes first to their minds when the afore-mentioned questions are posed to them; if a brainwriting session takes place, they write down on paper sheets/sticky notes etc. their first thoughts.

The discussion results should be documented by the facilitator on a flip chart paper of which a photo will be taken, through a video/audio recording, a mind map, an online tool such as Mural, Padlet, etc. If the thoughts of the participants have been written down on paper sheets/sticky notes etc., a photo of them all together can be taken instead.

The identified training and learning needs should subsequently be clustered by the facilitator in wider categories (according to skill types, means of knowledge acquisition etc.) (during the session with the support of the participants or at a later stage) and the most relevant training and learning needs should be highlighted for possible training or learning solutions to be suggested (*Brainstorming on Training Needs Results Report*, Annex 4).

• Closure and Evaluation (Brainstorming on Training Needs Evaluation Questionnaire, Annex 3).

In the *Brainstorming on Training Needs Results Report* (Annex 4), the conclusions of the session will be summarised, in order for the organisation/company's future trainings and learning solutions to address the identified training and learning needs. The report has to be sent to the head of the department in which the training needs' session has been carried out as well as to the Training and Development and/or the Human Resources department, depending on the case. The heads of the involved departments are responsible for "matching" the identified training and learning needs with existing or new trainings and learning activities.

Six months after the brainstorming/brainwriting session, the facilitator has to check whether the identified training and learning needs were addressed effectively (fill out the last section of the *Brainstorming on Training Needs Results Report*, Annex 4) and provide the updated report to all the involved departments (Training and Development and/or Human Resources Department as well as the affected department). In case of unaddressed training and learning needs, the heads of the afore-mentioned departments will be responsible to include these pending tasks as a high priority in their agenda, so as for relevant training/learning activities to be planned as soon as possible.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

After each brainstorming session, the participants should evaluate it (*Brainstorming on Training Needs Evaluation Questionnaire*, Annex 3).

The questionnaire should be sent out to all the participants via e-mail or a link to the questionnaire should be distributed. Alternatively, it can be handed out to the participants in paper form. The facilitator is responsible to collect and analyse the data and report it to the management (team leader/department manager/head of department) through the *Brainstorming on Training Needs Evaluation Report* (Annex 5).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

The learning of the participants in the activity cannot be evaluated; what can be observed is whether their existing learning gaps have been covered by the training and learning solutions suggested upon their identification and documentation, in the next brainstorming/brainwriting session that will take place with the same participants.

1.17. List of annexes

Annex 1: Brainstorming on Training Needs Participant List
Annex 2: Brainstorming on Training Needs Guide
Annex 3: Brainstorming on Training Needs Evaluation Questionnaire
Annex 4: Brainstorming on Training Needs Results Report
Annex 5: Brainstorming on Training Needs Evaluation Report

1.18. List of documentation for the certification

1. Brainstorming on Training Needs Participant List
2. Brainstorming on Training Needs Guide (adapted, if necessary)
3. Brainstorming on Training Needs Evaluation Questionnaires
4. Brainstorming on Training Needs Results Report
5. Brainstorming on Training Needs Evaluation Report
6. Evidence for the identified training and learning gaps/needs (photos of flip charts, links to relevant online tools etc.)

CA13: Communication Skills Assessment Tool

BB7

BB7 Ensure that workplace learning is tailored to adult learners needs

1.1. Activity Code

CA13: Communication Skills Assessment Tool

1.2. Building Block on which the activity is based

☑ Ensure that workplace learning is tailored to adult learners needs (BB7)

1.3. Activity or Tool

☑ Tool

1.4. Type of Activity or Tool

☑ Training Needs Analysis Tool for Soft Skills

1.5. Field of improvement

☑ Employee Transversal Skills

1.6. Scope of the activity

This activity aims to identify the existing level of communication skills of employees in order for training needs analysis to subsequently take place and a learning pathway for the improvement of their communication competence to be suggested, if necessary, which will help them be more effective in their work.

1.7. Who should lead the activity?

The Training and Development department, the Human Resources department, or the supervisor who has been trained to perform training needs analysis.

1.8. Who should attend the activity?

All the employees of the organisation/company independent of the hierarchy level.

1.9. Description of the activity

Communication is “the successful conveying or sharing of ideas and feelings”1.

“The transmission of a message from the sender to the recipient can be affected by a huge range of things. These include our emotions, the cultural situation, the medium used to communicate, and even our location […]. This is why good communication skills are so desirable by employers around the world: accurate, effective and unambiguous communication is actually extremely hard”2.

Good communication skills at the workplace can contribute to effective exchange of information both internally (between departments, between the staff, and between the staff and the management) and externally (between the company and partners or clients); it can also improve teamwork and support conflict resolution, increase efficiency, productivity, and staff retention, and establish a better business reputation both in terms of quality of goods and/or services and as a place to work for.

The *Communication Skills Assessment Tool* (Test) is used for evaluating the communication skills of all the employees of the organisation/company, which is required to be at a very good level. Based on the results of the test, the organisation/company will conclude on a learning pathway for each employee, including non-formal and informal learning, so as for their communication skills to improve. While formal learning is linked with training courses leading to official certifications and qualifications, non-formal learning is connected with training courses and other learning activities that do not award any certifications or qualifications, and informal learning covers learning through interactions with colleagues, friends, and family.

The test consists of 4 exercises including true/false questions, multiple-choice questions, matching questions, and a case study.

• If the score achieved in the test is **under 65%**, training on communication is considered necessary.

• If the score achieved in the test is **65-80%**, the implementation of supporting (experiential) activities (see Communication Skills Supporting (Experiential) Activities, Annex 3) is suggested, so that employees improve their communication skills.

• If the score achieved in the test is **over 80%**, observation by a supervisor or manager are suggested and, if necessary, provision of customised support (e.g., mentoring sessions) for further improvement of the employees.

The employees who will score **up to 80%** will take the same assessment for a second time after a reasonable period of time based on the learning path decided for them and their exact score, so as to be identified whether the provided learning activities have improved their skills and on what level.

1.10. Duration and frequency of implementation of the activity

• 45-60 minutes to complete the test.

• In case the employees are asked to take part in specific learning activities or training for their skills to get improved, additional time will be needed, depending on the type of supporting activities.

This activity should take place at least once for each employee, preferably at the beginning of their first year in the organisation/-company. If the score achieved in the test is up to 80% (from under 65% to 80%), the assessment should be repeated within 6 months to 1 year, depending on the exact score achieved and the duration of the supporting activities suggested, in order to record if there has been any progress and at what level.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Not Applicable

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

Prior to the assessment, the participants can search on the Internet for the terms “business communication” and “effective communication” as well as for the different types of communication (verbal/non-verbal, oral/written, face-to-face/online, intercultural etc.), their significance and context of use.

Also, the following will be needed for the activity:

- Communication Skills Assessment Tool (Test) (Annex 1)
- Communication Skills Assessment Tool (Test) (Correct Answers) (Annex 2)
- Communication Skills Assessment Record (Annex 3)
- Communication Skills Supporting (Experiential) Activities (Annex 4)
- Communication Skills Assessment Tool Evaluation Questionnaire (Annex 5)

1.14. Instructions for implementing the activity

1. The employee is asked to complete the *Communication Skills Assessment Tool (Test)* (Annex 1) by his supervisor or a manager/employee of the Training and Development or Human Resources department within 45-60 minutes' time.

2. With the use of the *Communication Skills Assessment Tool (Test) (Correct Answers)* (Annex 2), the completed test is evaluated by the supervisor/manager/another employee who has been assigned this task. If the score achieved by the employees is under 65%, they need to participate in specific training on communication. If their score is between 65-80%, supporting (preferably experiential) activities should be implemented (see also Annex 3; the number of supporting activities to be implemented should be decided by the supervisor/manager/other assigned person based on the identified training needs of the employees). If their score is over 80%, observation by the supervisor/manager/person assigned are suggested for monitoring the employees' progress, ensuring continuous development of them, and providing customised support (e.g., mentoring sessions), if necessary. The assessment results are registered on the *Communication Skills Assessment Record* (Annex 4).

3. Based on the above-described classification, a learning pathway is decided for each employee and is communicated to them along with their score achieved in the test. Information on the training and learning solutions suggested for the employees are also registered on the *Communication Skills Assessment Record* (Annex 4).

4. After a reasonable period of time related to the learning pathway decided for the employees and also the scores achieved in the test, the assessment is repeated for those who have achieved a score of up to 80% in the first assessment. The *Communication Skills Assessment Record* (Annex 4) is updated with the second assessment results.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

An evaluation questionnaire will be distributed to the employees after the completion of the test (*Communication Skills Assessment Tool Evaluation Questionnaire* (Annex 5)).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

Not Applicable

1.17. List of annexes

Annex 1: Communication Skills Assessment Tool (Test)
Annex 2: Communication Skills Assessment Tool (Test) (Correct Answers)
Annex 3: Communication Skills Supporting (Experiential) Activities
Annex 4: Communication Skills Assessment Record
Annex 5: Communication Skills Assessment Tool Evaluation Questionnaire

1.18. List of documentation for the certification

1. Communication Skills Assessment Tools (Tests)
2. Communication Skills Assessment Record
3. Communication Skills Assessment Tool Evaluation Questionnaires

CA14: English Language Skills Assessment Tool

BB7

BB7 Ensure that workplace learning is tailored to adult learners needs

1.1. Activity Code

CA14: English Language Skills Assessment Tool

1.2. Building Block on which the activity is based

☑ Ensure that workplace learning is tailored to adult learners needs (BB7)

1.3. Activity or Tool

☑ Tool

1.4. Type of Activity or Tool

☑ Training Needs Analysis Tool for Soft Skills

1.5. Field of improvement

☑ Employee Transversal Skills

1.6. Scope of the activity

This activity aims to identify the existing level of English language skills of employees in order for training needs analysis to subsequently take place and a learning pathway for the improvement of their competence in English to be suggested, if necessary, in order to gradually become competent English users.

1.7. Who should lead the activity?

The Training and Development department, the Human Resources department, or the supervisor who has been trained to perform training needs analysis.

1.8. Who should attend the activity?

All the employees of the organisation/company independent of the hierarchy level.

1.9. Description of the activity

The *English Language Skills Assessment Tool (Test)* is used for evaluating the competence of the employees of an organisation/-company in using the English language at a satisfactory (intermediate to upper intermediate) level. Based on the results of the test, the organisation/company can decide for a learning pathway for each employee towards improving their English language skills, including formal, non-formal, and informal learning. While formal learning is linked with training courses leading to official certifications and qualifications, non-formal learning is connected with training courses and other learning activities that do not award any certifications or qualifications, and informal learning covers learning through interactions with colleagues, friends, and family.

The test consists of 40 questions. Some of them can be replaced (e.g., questions that cover the same grammatical phenomenon as other questions; no more than 10 out of 40), so that questions on business vocabulary or vocabulary used in a specific industry are included.

• If the score achieved in the test is **under 65%,** specific training in the use of the English language is considered necessary.

• If the score achieved in the test is **65-80%**, the implementation of supporting activities is suggested, so that the employees improve their English language skills. Such activities could be to participate in meetings which are held in English, read corporate documents written in English, or watch selected videos in English or on the use of English.

• If the score achieved in the test is **over 80%**, mentoring and/or coaching by someone in the company/organisation who is a proficient user of the English language are suggested.

Employees who score **up to 80%** should take the same assessment for a second time after a reasonable period of time based on the learning pathway decided for them and their exact score, so as to be identified whether the provided learning activities have improved their skills and on what level.

1.10. Duration and frequency of implementation of the activity

• 40-60 minutes to complete the test (i.e., 1-1.5 minutes for each question).

• In case the employees are asked to take part in specific learning activities or training for their skills to get improved, additional time will be needed, depending on the type of supporting activities.

This activity should take place at least once for each employee, preferably at the beginning of their first year in the organisation/-company. If the score achieved in the test is up to 80% (from under 65% to 80%), the assessment should be repeated within 6 months to 1 year, depending on the exact score achieved and the duration of the supporting activities suggested, in order to record if there has been any progress and at what level.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Not Applicable

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

The participants in the activity should use online resources or paper-based handbooks and workbooks of the English language preferably of intermediate level and above to get prepared for the assessment. Also, they can watch videos in English and/or on English for professionals available on the Internet. They are suggested to focus on the most common grammar mistakes (use of prepositions, tenses, conditionals, the passive voice, phrasal verbs etc.) and on vocabulary used in business.

Also, the following will be needed for the activity:

• English Language Skills Assessment Tool (Test) (Annex 1)
• English Language Skills Assessment Tool (Test) (Correct Answers) (Annex 2)
• English Language Skills Assessment Record (Annex 3)
• English Language Skills Assessment Tool Evaluation Questionnaire (Annex 4)

1.14. Instructions for implementing the activity

1. The employee is asked to complete the *English Language Skills Assessment Tool (Test)* (Annex 1) by his supervisor or a manager/employee of the Training and Development or Human Resources department within 40-60 minutes' time.

2. With the use of the *English Language Skills Assessment Tool (Test) (Correct Answers)* (Annex 2), the completed test is evaluated by the supervisor/manager/another employee who is assigned this task. If the score achieved by the employees is under 65%, they need to participate in formal training. If their score is between 65-80%, supporting activities should be implemented (see section "Description" above). If their score is over 80%, mentoring and/or coaching are suggested. The assessment results are registered on the *English Language Skills Assessment Record* (Annex 3).

3. Based on the above-described classification, a learning pathway is decided for each employee and is communicated to them along with their score achieved in the test. Information on the training and learning solutions suggested for the employees are also registered in the *English Language Skills Assessment Record* (Annex 3).

4. After a reasonable period of time related to the learning pathway decided for the employees and also the score achieved in the test, the assessment is repeated for those who have achieved a score of up to 80% in the first assessment. The *English Language Skills Assessment Record* (Annex 3) is updated with the second assessment results.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

An evaluation questionnaire is distributed to the employees after the completion of the test (*English Language Skills Assessment Tool Evaluation Questionnaire* (Annex 4)).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

Not Applicable

1.17. List of annexes

Annex 1: English Language Skills Assessment Tool (Test)
Annex 2: English Language Skills Assessment Tool (Test) (Correct Answers)
Annex 3: English Language Skills Assessment Record
Annex 4: English Language Skills Assessment Tool Evaluation Questionnaire

1.18. List of documentation for the certification

1. English Language Skills Assessment Tools (Tests)
2. English Language Skills Assessment Record
3. English Language Skills Assessment Tool Evaluation Questionnaires

CA15: Numerical Skills Assessment Tool

BB7

BB7 Ensure that workplace learning is tailored to adult learners needs

1.1. Activity Code

CA15: Numerical Skills Assessment Tool

1.2. Building Block on which the activity is based

☑ Ensure that workplace learning is tailored to adult learners needs (BB7)

1.3. Activity or Tool

☑ Tool

1.4. Type of Activity or Tool

☑ Training Needs Analysis Tool for Soft Skills

1.5. Field of improvement

☑ Employee Transversal Skills

1.6. Scope of the activity

This activity aims to identify the existing level of numerical skills of employees in order for training needs analysis to subsequently take place and a learning pathway for their improvement in this area to be suggested, if necessary.

1.7. Who should lead the activity?

The Training and Development department, the Human Resources department or the supervisor who has been trained to perform training needs analysis.

1.8. Who should attend the activity?

All the employees of the organisation/company independent of the hierarchy level.

1.9. Description of the activity

The *Numerical Skills Assessment Tool (test)* is used for evaluating the numeracy of all the employees of the organisation/company, which is required to be at a very good level. Based on the results of the test, the organisation/company will conclude on a learning pathway for each employee, including non-formal and informal learning, so as for their numerical skills to improve. While formal learning is linked with training courses leading to official certifications and qualifications, non-formal learning is connected with training courses and other learning activities that do not award any certifications or qualifications, and informal learning covers learning through interactions with colleagues, friends, and family.

The test consists of 15 exercises of different difficulty level.

• If the score achieved in the test is **under 50%**, training on numeracy is considered necessary.

• If the score achieved in the test is **50-70%**, the implementation of supporting activities is suggested, so that employees improve their numerical skills.

• If the score achieved in the test is **over 70%**, observation by a supervisor or manager are suggested and, if necessary, provision of customised support for further improvement of the employees.

The employees who will score **up to 70%** will take the same assessment for a second time after a reasonable period of time based on the learning path decided for them and their exact score, so as to be identified whether the provided learning activities have improved their skills and on what level.

1.10. Duration and frequency of implementation of the activity

• 60 minutes for completing the test.

• In case the employees are asked to take part in specific learning activities or training for their skills to get improved, additional time will be needed, depending on the type of supporting activities.

This activity should take place at least once for each employee, preferably at the beginning of their first year in the organisation/-company. If the score achieved in the test is up to 70% (from under 50% to 70%), the assessment should be repeated within 6 months to 1 year, depending on the exact score achieved and the duration of the supporting activities suggested, in order to record if there has been any progress and at what level.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Not Applicable

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

- Numerical Skills Assessment Tool (Test) (Annex 1)
- Numerical Skills Assessment Tool (Test) (Correct Answers) (Annex 2)
- Numerical Skills Assessment Record (Annex 3)
- Numerical Skills Assessment Tool Evaluation Questionnaire (Annex 4)

1.14. Instructions for implementing the activity

1. The employee is asked to complete the *Numerical Skills Assessment Tool (Test)* (Annex 1) by his supervisor or a manager/employee of the Training and Development or Human Resources department within 60 minutes' time.

2. With the use of the *Numerical Skills Assessment Tool (Test) (Correct Answers)* (Annex 2), the completed test is evaluated by the supervisor/manager/another employee who has been assigned this task. If the score achieved by the employees is under 50%, they need to participate in specific training on numeracy. If their score is between 50-70%, supporting activities should be implemented. If their score is over 70%, observation by the supervisor/manager/person assigned are suggested for monitoring the employees' progress, ensuring continuous development of them, and providing customised support, if necessary. The assessment results are registered on the *Numerical Skills Assessment Record* (Annex 3).

3. Based on the above-described classification, a learning pathway is decided for each employee and is communicated to them along with their score achieved in the test. Information on the training and learning solutions suggested for the employees are also registered on the *Numerical Skills Assessment Record* (Annex 3).

4. After a reasonable period of time related to the learning pathway decided for the employees and also the scores achieved in the test, the assessment is repeated for those who have achieved a score of up to 70% in the first assessment. The *Numerical Skills Assessment Record* (Annex 3) is updated with the second assessment results.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

An evaluation questionnaire will be distributed to the employees after the completion of the test (*Numerical Skills Assessment Tool Evaluation Questionnaire* (Annex 4)).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

Not Applicable

1.17. List of annexes

Annex 1: Numerical Skills Assessment Tool (Test)
Annex 2: Numerical Skills Assessment Tool (Test) (Correct Answers)
Annex 3: Numerical Skills Assessment Record
Annex 3: Numerical Skills Assessment Tool Evaluation Questionnaire

1.18. List of documentation for the certification

1. Numerical Skills Assessment Tools (Tests)
2. Numerical Skills Assessment Record
3. Numerical Skills Assessment Tool Evaluation Questionnaires

CA16: Time Management Skills Assessment Tool

BB7

BB7 Ensure that workplace learning is tailored to adult learners needs

1.1. Activity Code

CA16: Time Management Skills Assessment Tool

1.2. Building Block on which the activity is based

- ☑ Ensure that workplace learning is tailored to adult learners needs (BB7)

1.3. Activity or Tool

- ☑ Tool

1.4. Type of Activity or Tool

- ☑ Training Needs Analysis Tool for Soft Skills

1.5. Field of improvement

- ☑ Employee Transversal Skills

1.6. Scope of the activity

This activity aims to identify the existing level of time management skills of employees, in order for further training needs analysis to subsequently take place and a learning pathway for their improvement in this area to be suggested, if necessary.

1.7. Who should lead the activity?

The Training and Development department, the Human Resources department or a supervisor who has been trained to perform training needs analysis

1.8. Who should attend the activity?

All the employees of the organisation/company independent of the hierarchy level.

1.9. Description of the activity

The *Time Management Skills Assessment Tool (Test)* is used for evaluating the skills of employees on the managing their time effectively, which is an important requirement when working. Based on the results of the test, the organisation/company will conclude on a learning pathway for each employee, including non-formal and informal learning, so as for their skills on using software such as Microsoft Word to improve. While formal learning is linked with training courses leading to official certifications and qualifications, non-formal learning is connected with training courses and other learning activities that do not award any certifications or qualifications, and informal learning covers learning through interactions with colleagues, friends, and family.

The test consists of 4 exercises, including true-false questions and cases studies followed by questions or sequence (correct order) questions on time management and time management principles and techniques.

• If the score achieved is **under 65%**, training on time management is considered necessary.

• If the score achieved is **between 65-80%**, the implementation of supporting activities (see Annex 3) is suggested, so that the employees improve their time management.

• If the score achieved is **over 80%**, observation by a supervisor or manager are suggested and, if necessary, provision of customised support for further improvement of the employees.

The employees who will **score up to 80%** will take the same assessment for a second time after a reasonable period of time based on the learning path decided for them and their exact score, so as to be identified whether the provided learning activities have improved their skills and on what level.

1.10. Duration and frequency of implementation of the activity

- 60-90 minutes for completing the test.

• In case the employees are asked to take part in specific learning activities or training for their skills to get improved, additional time will be needed, depending on the type of supporting activities.

This activity should take place at least once for each employee, preferably at the beginning of their first year in the organisation/-company. If the score achieved in the test is up to 80% (from under 65% to 80%), the assessment should be repeated within 6 months to 1 year, depending on the exact score achieved and the duration of the supporting activities suggested, in order to record if there has been any progress and at what level.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Not Applicable

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

Prior to the test, the participants can search on the Internet for the importance of time management in life and especially at work, including time management techniques, so as to gain an idea of what this test examines and be in a position to answer the assessment questions.

- Time Management Assessment Skills Tool (Test) (Annex 1)
- Time Management Skills Assessment Tool (Test) (Correct Answers) (Annex 2)
- Time Management Skills Supporting Activities (Annex 3)
- Time Management Skills Assessment Record (Annex 4)
- Time Management Skills Assessment Tool Evaluation Questionnaire (Annex 5)

1.14. Instructions for implementing the activity

1. The employee is asked to complete the *Time Management Skills Assessment Tool (Test)* (Annex 1) by his supervisor or a manager/employee of the Training and Development or Human Resources department within 60-90 minutes' time.

2. With the use of the *Time Management Skills Assessment Tool (Test) (Correct Answers)* (Annex 2), the completed test is evaluated by the supervisor/manager/another employee who has been assigned this task. If the score achieved by the employees is under 65%, they need to participate in specific training on managing their time effectively. If their score is between 65-80%, supporting activities should be implemented (*Time Management Skills Supporting Activities*, Annex 3). If their score is over 80%, observation by the supervisor/manager/person assigned are suggested for monitoring the employees' progress, ensuring continuous development of them, and providing customised support, if necessary. The assessment results are registered on the *Time Management Skills Assessment Record* (Annex 4).

3. Based on the above-described classification, a learning pathway is decided for each employee and is communicated to them along with their score achieved in the test. Information on the training and learning solutions suggested for the employees are also registered on the *Time Management Skills Assessment Record* (Annex 4).

4. After a reasonable period of time related to the learning pathway decided for the employees and also the scores achieved in the test, the assessment is repeated for those who have achieved a score of up to 80% in the first assessment. The *Time Management Skills Assessment Record* (Annex 3) is updated with the second assessment result.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

An evaluation questionnaire will be distributed to the employees after the completion of the test (*Time Management Skills Assessment Tool Evaluation Questionnaire* (Annex 5)).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

Not Applicable

1.17. List of annexes

Annex 1: Time Management Skills Assessment Tool (Test)
Annex 2: Time Management Skills Assessment Tool (Test) (Correct Answers)
Annex 3: Time Management Skills Supporting Activities
Annex 4: Time Management Assessment Record
Annex 5: Time Management Skills Assessment Tool Evaluation Questionnaire

1.18. List of documentation for the certification

1. Time Management Skills Assessment Tools (Tests)
2. Time Management Skills Assessment Record
3. Time Management Skills Assessment Tool Evaluation Questionnaires

CA17: Train the Trainers

BB7

BB7 Ensure that workplace learning is tailored to adult learners needs

1.1. Activity Code

CA17: Train the Trainers

1.2. Building Block on which the activity is based

☑ Ensure that workplace learning is tailored to adult learners needs (BB7)

1.3. Activity or Tool

☑ Activity

1.4. Type of Activity or Tool

☑ System for Strategic Learning (not ad hoc learning)

1.5. Field of improvement

☑ Employee Sensitisation on the Importance of Learning

1.6. Scope of the activity

The scope of the activity is to develop a group of in-house trainers to be used by the organisation/company to ensure effective knowledge transfer and skills' development within the organisation/company.

The main objectives of the activity are the following:

• To train future trainers on knowledge and skills' transfer techniques.

• To provide future trainers with all necessary skills to identify training needs, design and develop the training curriculum and training content, and implement and evaluate the training programme.

1.7. Who should lead the activity?

The HR department, the Training and Development department, or the management team of the organisation/company.

1.8. Who should attend the activity?

Employees with expertise in specific fields, who will be selected by the organisation/company to become in-house trainers. Also, an in-house or external trainer of the future trainers.

1.9. Description of the activity

The objective of this activity is for the organisation/company to develop a group of in-house trainers, who will be able to deliver different types of in-company trainings, including the organisation/company's induction training.

The activity is implemented in five steps, starting from a call for employees interested in becoming trainers to the evaluation of the application forms, the development of a curriculum for the "Train the Trainers" workshop (and the respective training material), the training of these employees, and the keeping of a record of employees trained as trainers.

The training should be delivered by an in-house trainer (a previously in-house trained employee or someone else) or an external trainer, who will be hired by the organisation/company to deliver the training.

1.10. Duration and frequency of implementation of the activity

The "Train the Trainers" workshop (step 4) should have a minimum duration of 14 hours and should be implemented once a year unless no need for more trainers is foreseen during the year.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Not Applicable

1.12. Prerequisites for participating in the activity (if applicable)

Experience and/or expertise in specific topics and interest in providing trainings.

1.13. Resources for the activity

- Training of In-company Trainers: Expression of Interest (Application Form)
- "Train the Trainers" Curriculum
- "Train the Trainers" Participant List
- Trainers Record

1.14. Instructions for implementing the activity

2. At the beginning of the year, the organisation/company announces a call for employees to express their interest in becoming in-house trainers; the organisation/company should announce its policy to train in-company trainers through a formal document or e-mail. Evidence should be kept for both the call and the internal policy.

3. Interested employees should express their interest by submitting an application form (Annex 1), in which they will also declare a list of possible topics on which they could provide training.

4. The organisation/company should review the applications received and should select those that are considered more appropriate.

5. On an annual basis, the organisation/company should organise and implement a “Train the Trainers” workshop to allow more employees to become in-house trainers. The workshop will be delivered either by an external or by an in-house trainer. The Curriculum of the workshop (Annex 2) and the Participant List (Annex 3) will be kept as evidence.

A record of all the in-house trainers of the organisation/company (people who have been trained in “Train the Trainers” workshops) (Annex 4) should be kept and updated each time a “Train the Trainers” workshop is completed.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

The “Training the Trainers” workshop will be evaluated with the use of Annex 1 of COM5: Training Monitoring Toolkit.

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

The learning from the “Train the Trainers” workshop will be evaluated with the use of Annex 2A and Annex 2B of COM5: Training Monitoring Toolkit. The templates should be completed by the trainer of the workshop.

1.17. List of annexes

Annex 1: Training of In-company Trainers: Expression of Interest (Application Form)
Annex 2: “Train the Trainers” Curriculum
Annex 3: “Train the Trainers” Participant List
Annex 4: In-Company Trainers Record

1.18. List of documentation for the certification

1. Training of In-company Trainers: Expression of Interest (Application Form)
2. “Train the Trainers” Curriculum
3. “Train the Trainers” Participant List
4. In-company Trainers Record

CA18: Word Processing Skills Assessment Tool

BB7

BB7 Ensure that workplace learning is tailored to adult learners needs

1.1. Activity Code

CA18: Word Processing Skills Assessment Tool

1.2. Building Block on which the activity is based

- ☑ Ensure that workplace learning is tailored to adult learners needs (BB7)

1.3. Activity or Tool

- ☑ Tool

1.4. Type of Activity or Tool

- ☑ Training Needs Analysis Tool for Soft Skills

1.5. Field of improvement

- ☑ Employee Transversal Skills

1.6. Scope of the activity

This activity aims to identify the existing level of information and communications technology (ICT) skills of employees on word processing software, in order for further training needs analysis to subsequently take place and a learning pathway for their improvement in this area to be suggested, if necessary.

1.7. Who should lead the activity?

The Training and Development department, the Human Resources department or a supervisor who has been trained to perform training needs analysis.

1.8. Who should attend the activity?

All the employees of the organisation/company independent of the hierarchy level.

1.9. Description of the activity

The *Word Processing Skills Assessment Tool (Test)* is used for evaluating the skills of employees on the use of word processing software, which is required to be at a very good level. Based on the results of the test, the organisation/company will conclude on a learning pathway for each employee, including non-formal and informal learning, so as for their skills on using software such as Microsoft Word to improve. While formal learning is linked with training courses leading to official certifications and qualifications, non-formal learning is connected with training courses and other learning activities that do not award any certifications or qualifications, and informal learning covers learning through interactions with colleagues, friends, and family.

The test consists of 16 multiple-choice questions on the use of Microsoft Word software on word processing.

- If the score achieved is **under 50%**, training on word processing is considered necessary.

• If the score achieved is **between 50-70%**, the implementation of supporting activities is suggested, so that the employees improve their ICT skills on word processing.

• If the score achieved is **over 70%**, observation by a supervisor or manager are suggested and, if necessary, provision of customised support for further improvement of the employees.

The employees who will **score up to 70%** will take the same assessment for a second time after a reasonable period of time based on the learning path decided for them and their exact score, so as to be identified whether the provided learning activities have improved their skills and on what level.

1.10. Duration and frequency of implementation of the activity

• 30-40 minutes for completing the test.

• In case the employees are asked to take part in specific learning activities or training for their skills to get improved, additional time will be needed, depending on the type of supporting activities.

This activity should take place at least once for each employee, preferably at the beginning of their first year in the organisation/company. If the score achieved in the test is up to 70% (from under 50% to 70%), the assessment should be repeated within 2 to 5 months, depending on the exact score achieved and the duration of the supporting activities suggested, in order to record if there has been any progress and at what level.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Not Applicable

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

• Word Processing Skills Assessment Tool (Test) (Annex 1)
• Word Processing Skills Assessment Tool (Test)
(Correct Answers) (Annex 2)
• Word Processing Skills Assessment Record (Annex 3)
• Word Processing Skills Assessment Tool Evaluation
•Questionnaire (Annex 4)

1.14. Instructions for implementing the activity

1. The employee is asked to complete the *Word Processing Skills Assessment Tool (Test)* (Annex 1) by his supervisor or a manager/employee of the Training and Development or Human Resources department within 30-40 minutes' time.

2. With the use of the Word Processing *Skills Assessment Tool (Test) (Correct Answers)* (Annex 2), the completed test is evaluated by the supervisor/manager/another employee who has been assigned this task. If the score achieved by the employees is under 50%, they need to participate in specific training on word processing. If their score is between 50-70%, supporting activities should be implemented. If their score is over 70%, observation by the supervisor/manager/person assigned are suggested for monitoring the employees' progress, ensuring continuous development of them, and providing customised support, if necessary. The assessment results are registered on the *Word Processing Skills Assessment Record* (Annex 3).

3. Based on the above-described classification, a learning pathway is decided for each employee and is communicated to them along with their score achieved in the test. Information on the training and learning solutions suggested for the employees are also registered on the *Word Processing Skills Assessment Record* (Annex 3).

4. After a reasonable period of time related to the learning pathway decided for the employees and also the scores achieved in the test, the assessment is repeated for those who have achieved a score of up to 70% in the first assessment. The *Word Processing Skills Assessment Record* (Annex 3) is updated with the second assessment result.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

An evaluation questionnaire will be distributed to the employees after the completion of the test (Word Processing Skills Assessment Tool Evaluation Questionnaire (Annex 4)).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

Not Applicable

1.17. List of annexes

Annex 1: Word Processing Skills Assessment Tool (Test)
Annex 2: Word Processing Skills Assessment Tool (Test) (Correct Answers)
Annex 3: Word Processing Skills Assessment Record
Annex 4: Word Processing Skills Assessment Tool Evaluation Questionnaire

1.18. List of documentation for the certification

1. Word Processing Skills Assessment Tools (Tests)
2. Word Processing Skills Assessment Record
3. Word Processing Skills Assessment Tool Evaluation Questionnaires

CA19: Competency Framework LEVEL 5

BB9

BB9 Assure the quality of adult learning in the workplace

1.1. Activity Code

CA19: Competency Framework LEVEL 5

1.2. Building Block on which the activity is based

☑ Assure the quality of adult learning in the workplace (BB9)

1.3. Activity or Tool

☑ Tool

1.4. Type of Activity or Tool

☑ Assessment Tool for the Validation of Workplace Learning

1.5. Field of improvement

☑ Organisation Learning Strategy

1.6. Scope of the activity

The *Competency Framework LEVEL5* provides the organisation/-company with a learning reference system to be used for analysing the competences that the employees need to have, in terms of knowledge, skills, and attitudes and at five levels of skill acquisition. Through group work, key competences are broken down for this analysis to serve as a basis for learning solutions for employees to be decided for achieving capacity improvement. This analysis offers also to employees the opportunity to realise what the core values of the organisation/company are, as horizontal and transversal skills are analysed too with the use of the tool.

1.7. Who should lead the activity?

The Training and Development department, the Human Resources department, or a supervisor.

1.8. Who should attend the activity?

All the employees of the organisation/company, independent of hierarchy level.

1.9. Description of the activity

The *Competency Framework LEVEL5* enables groups of employees (and also employers) to reflect on the key competences (hard and soft skills) that are required by the organisation/company at a certain period of time and break them down into knowledge, skills, and attitudes as well as into five levels of skill acquisition, from grade 1 (beginner) to grade 5 (expert). Through the tool, the participants in the activity can also monitor their progress with regards to acquiring or improving the analysed competences.

1.10. Duration and frequency of implementation of the activity

• 2-3 sessions of 2-3 hours each, maximum once a year (or two times a year) for completing the tool (each time for new key competences or with new groups).

• Each group/employee to check the tool minimum 2 times after its completion for 15-20 minutes in period of 6 months to 1 year in order to fill out section 3 of the tool (3. Competence Improvement) on their progress in acquiring specific competences (L1-5) in terms of knowledge, skills, and attitudes.

1.11. Minimum and maximum number of participants in the activity (if applicable)

Minimum 4 to maximum 10 employees (and/or employers).

In the first session (identification of key competences), all participants have to take part in one group.

In the second session and all the following sessions, the participants have to take part in pairs or in groups of equal size, smaller than the group in the first session. It is important that in each group there is diversity in terms of level of hierarchy of the participants (employers and managers can also take part).

1.12. Prerequisites for participating in the activity (if applicable)

Not Applicable

1.13. Resources for the activity

In the first session of the activity, a list of key competences required by the organisation/company and/or lists of key performance indicators (KPI) through which the participants will conclude on the key competences should be provided. This will help the participants conclude on a short list of key competences that will be subsequently analysed with the use of the tool. Alternatively, they can conclude on the competences to analyse through discussion facilitated by the manager/supervisor responsible for the activity.

In the same session, the participants should be also introduced to the "Bloom's taxonomy" model of classification of learning objectives (the manager/supervisor responsible for the activity can find information on this, for example, here: **https://bloomstaxonomy.net/**) and they should be provided with the list of verbs suggested by this model for producing measurable learning objectives ("Bloom's taxonomy action verbs"). This will help the participants complete part 1: Competence Description of the tool for each competence, at the beginning of the second session (or at the end of the first session).

In the first session, the following should be used:

Competency Framework LEVEL5 – Revised Bloom's Taxonomy Action Verbs (Annex 3)

In the second (and any additional sessions), the following have to be used:

Competency Framework LEVEL5 Template (Annex 1)
Competency Framework LEVEL5 Example (Annex 2)
Competency Framework LEVEL5 Participant List (Annex 4)
Competency Framework LEVEL5 Evaluation Questionnaire (Annex 5)

1.14. Instructions for implementing the activity

1.1. In the first session, the participants in the activity, in one group, identify the key competences necessary for the organisation/company activities (transversal skills and skills linked to the values of the organisation/company) as well as those necessary for each department/service offered/job position in the organisation/company (hard skills) to complete the *Competency Framework LEVEL5 Template* (Annex 1). This can be done through discussion and/or with the use of an indicative list of key competences and/or with lists of KPIs for different job positions. If the number of identified competences is large, the participants should select a minimum of 5 competences that they will finally analyse with the support of the manager/supervisor.

2. As soon as the participants conclude on the final list of key competences, the manager/supervisor should explain to them how to produce learning objectives for the selected competences at three levels: knowledge, skills, and attitudes, with the use of the Bloom's taxonomy (classification and action verbs) (*Competency Framework LEVEL5 – Revised Bloom's Taxonomy Action Verbs*, Annex 3). This will get the participants prepared for the second session of the activity.

3. In the second session (the same or another day), in smaller groups or in pairs, the participants provide a short description of each competence (this can also take place at the end of the first session) and then, break the competence down into knowledge, skills, and attitudes.

4. Following this, they complete a three-column and five-row table (knowledge, skills, and attitudes, from beginner to expert) by providing descriptions for the 5 levels of mastery of the specific competence, in terms of knowledge, skills, and attitudes.

The completion of the tool (*Competency Framework LEVEL5 Template*, Annex 1) can take place in more than one session: for example, one session can focus on the skills related to the field of activities of the organisation/company and one session on horizontal and transversal skills. The participants can be also provided with some examples of analysed competences (*Competency Framework LEVEL5 Template*, Annex 2).

5. As soon as the table is completed, the group or each employee individually (in copies of the completed tool), fills out a second table on their current level with regards to the analysed competences, in terms of knowledge, skills, and attitudes (column 1). This table should be completed at least two more times for the progress made by the group or each employee separately in those competences to be recorded and used by the manager/supervisor for their upskilling. Optionally, charts can be created based on this data for visual representation of the recorded progress.

6. At the end of each session, the participants have to complete the *Competency Framework LEVEL5 Participants List* (Annex 4).

7. When the activity is completed, the manager/supervisor analyses the data collected by the tool to come to conclusions on the current level of possession of key competences among the staff. This will serve as a basis for the organisation/company to create learning and training plans for the employees to scale up specific competences.

1.15. Evaluation (Reaction) – How do you evaluate whether the participants are happy with the activity?

An evaluation questionnaire will be used to measure the satisfaction of the participants with the activity, as soon as the tool is completed (*Competency Framework LEVEL5 Evaluation Questionnaire*, Annex 5).

1.16. Evaluation (Learning) – How do you evaluate whether the participants have learnt new things from the activity?

Through the use of the *Competency Framework LEVEL5*, the participants in the activity are able to identify competences and differentiate among knowledge, skills, and attitudes with regards to these competences as well as among levels of acquisition of them. Additionally, they can have tables through which they can identify how competent they are in each of them. By revisiting the tables of the tool, their progress with regards to specific competences can be monitored and recorded. Also, charts can be developed for their progress in each competence, which can provide a visual representation of their improvement.

1.17. List of annexes

Annex 1: Competency Framework LEVEL5 Template
Annex 2: Competency Framework LEVEL5 Example
Annex 3: Competency Framework LEVEL5 – Revised Bloom's Taxonomy Action Verbs
Annex 3: Competency Framework LEVEL5 Participant List
Annex 4: Competency Framework LEVEL5 Evaluation Questionnaire

1.18. List of documentation for the certification

1. Competency Framework LEVEL5 Template (completed with the analysis of minimum 5 key competences)
2. Competency Framework LEVEL5 Participant List
3. Competency Framework LEVEL5 Evaluation Questionnaires
4. Lists of Key Competences and/or KPIs (if used; optional)