



DE/11/LLP-LDV/TOI 147 420

## Healthy Learning in SMEs

# Common Course Framework for Learning Promoters within SMEs.



## Contents

Glossary .....	3
Introduction to the Project .....	4
The background: .....	4
Objectives of HLS.....	4
Target group and prerequisites .....	5
The mission and role of the learning promoter.....	5
Material for implementing a healthy working environment which facilitates employees to learn within SME .....	7
The health check tool .....	7
The strategic health development plan .....	7
Review of current learning activities .....	8
Personal Development Plan .....	9
Action Plan .....	12
Diagram of the whole process .....	13
Reflection and Evaluation .....	14
Project Partners of the HLS-project.....	15

## Glossary

Learning promoter	An individual within the firm with responsibility for delivering the course material
SME	Small and medium size enterprise.
EU	European Union
Lifelong Learning	A European Union programme to promote vocational training
HLS	Healthy Learning in SMEs
Health	According to the WHO health is a state of complete physical, mental and social wellbeing and not merely the absence of disease and infirmity. Within this project we will use the term “health”, focussing on mental and social wellbeing.
Informal learning:	Informal learning results from daily activities related to work, family life or leisure. It is not structured and usually does not lead to certification. In most cases, it is unintentional on the part of the learner
Non-formal learning:	Non-formal learning is not provided by an education or training institution and typically does not lead to certification. However, it is intentional on the part of the learner and has structured objectives, times and support
Formal learning:	Formal learning is typically provided by education or training institutions, with structured learning objectives, learning time and learning support. It is intentional on the part of the learner and leads to certification (Source: EU-Commission: <a href="http://ec.europa.eu/education/lifelong-learning-policy/doc52_en.htm">http://ec.europa.eu/education/lifelong-learning-policy/doc52_en.htm</a> , 14.12.2011)

## **Introduction to the Project**

**HLS – Healthy learning in SME is working to improve SME productivity and growth by improving awareness of the importance of sustainable workplace learning**

### **The background:**

SMEs are an important part of the economy of the EU. According to the European Commission of Enterprise and Industry, 99% of all European businesses have 250 employees or less. However SMEs in the EU have less productivity and grow more slowly than their counterparts in the United States. Therefore it is important to strengthen the performance of SMEs. One way of doing so is by encouraging all employees to engage in lifelong learning activities in the workplace.

Facilitating a working environment where learning is possible, encouraged and supported is an important step in improving productivity, firm growth and employee welfare. But learning depends on certain prerequisites and does not happen simply by enforcing employees to do so. Therefore setting up the conditions for a “healthy learning environment” becomes a crucial step in the process.

Usually, though, SMEs are hardly aware of the necessity of learning at the workplace, never to mention the idea of a sustainable learning environment. This means they are seldom reflecting on questions such as:

- What makes learning at the workplace possible?
- What could improve and support learning abilities?
- What are the main obstacles to the learning process? – e.g. stress, time pressure, no perspective, negative social environment.....

For all these reasons Healthy Learning in SMEs aims at adapting the former European Project “Health Tutor in Adult Education” - which focused on setting up a healthy learning environment in adult education institutions - to the needs of SMEs.

### **Objectives of HLS**

The overall aim of HLS is to help SMEs to set up a healthy working environment which facilitates employees to learn.

And as a consequence:

- To improve the general health of employees in SMEs.
- To improve the competitiveness of SMEs

To reach this aim there are some steps in between, such as:

- raising awareness of the importance of learning at the workplace in general
- identifying obstacles which prevent employees from learning at the workplace, taking into account the workplace environment
- identifying the status quo of learning at the workplace

- defining prerequisites for creating a sustainable learning environment at the workplace
- training SMEs in implementing a sustainable learning environment at the workplace
- accompanying SMEs while putting what they have learned into practise

The purpose of the course framework is to provide learning promoters within small and medium size enterprises (SMEs) an overview of the steps to be taken into account to reach this aim and defines prerequisites, tasks and roles.

### **Target group and prerequisites**

The overall target group of the HLS approach are SME – small and medium sized enterprises with a maximum of 249 employees.

Within the SME HLS is addressing so called “Learning promoters”. Learning promoters are employees or managers working within their SME. The ideal learning promoter will have the following prerequisites:

Prerequisites of the learning promoter:

- Has good negotiating skills
- Has good communication and listening skills
- Has sufficient credibility and authority within the firm to implement HLS
- Is trusted by fellow workers
- Is interested in workplace learning issues
- Is interested in health related issues in the workplace
- Has time for his / her role as learning promoter

Additional desirable prerequisites are:

- has experience of working in different areas within the SME
- currently possesses a teaching or learning role within the workplace
- is a works councillor

It is advisable that - depending on the resources and the size of the SME- two employees take the role of being a learning promoters. This provides a better chance to exchange ideas and to reflect on what has been achieved and on which further activities to do.

It is crucial that participating SMEs demonstrate a willingness to improve their working environment and are willing to allocate the time necessary to allow the learning promoter to familiarise him/herself with the course material and the work involved in it.

### **The mission and role of the learning promoter**

The mission of the learning promoter is to set up a healthy working environment which

facilitates learning for employees.

Of course this will not be possible without the help and support of the management and the other employees. But the learning promoter is the one with the leading role.

The learning promoter is supposed to:

- Identify the status quo of the working environment within his/her SME with the help of the “health check”
- Identify the status quo of learning activities within his/her SME with the help of a “review of current learning”
- Develop and implement a strategic health plan for the SME
- Consult with Senior Management on health/ well-being and learning issues
- Promote learning activities within his / her SME
- Promote a personal development plan for individual employees
- Analyse data, set monitoring systems to measure any improvements made and report to senior management as appropriate.

## **Material for implementing a healthy working environment which facilitates employees to learn within SME**

The material will be used for implementing a healthy working environment which facilitates employees to learn. The materials developed so far are:

- HLS – health check tool – questionnaire /evaluation tool
- Strategic Health development plan
- Review of current learning activities – questionnaire / evaluation tool
- Personal learning development plan
- Action plan for learning activities

Within the next couple of pages we will shortly outline the purpose of each tool and the step-by-step-procedure of implementation.

### **The health check tool**

Firstly it has to be pointed out that by using the term “health” we take the definition of the WHO stating, “health is a state of complete physical, mental and social wellbeing and not merely the absence of disease and infirmity.”

*Why looking at the health aspect within SME?*

Staying healthy and working in healthy conditions is a general aim in industrialised countries. It is an important issue in promoting employability to both employees and enterprises. Health promotion in enterprises is part of the human resources policy.

It usually has two goals:

1. improving working conditions towards a health promoting environment
2. improving employee’s behaviour towards a healthy balanced life style

The aim of the Health Check Assessment Tool for SMEs is to identify areas of improvement within the learning promoter’s company.

The focus of improvement is **not** directed towards the individual health of employees but towards the establishment of a general healthy environment within SMEs which serves as a prerequisite for working and learning processes. The health check tool is focussing on the mental and social wellbeing of employees within the SME.

Procedure and time: The health check tool will not be handed out to individual employees of the SME, but filled in by the learning promoter him / herself. The estimated time for filling in the questionnaire is about half an hour.

### **The strategic health development plan**

Based on the outcome of the Health Check, the learning promoter will identify areas of improvement within his/her company. We suggest choosing 2 – 3 aspects to start with. It is

better to start with something fairly easy to realise to become familiar with the whole procedure. The learning promoter should try to involve not only management, but also other employees in the process and discussion.

Since the health check is not directed towards the health of the individual, the strategic health development plan for SMEs is also not directed towards the individual health of employees, but towards the establishment of a general healthy environment within SMEs which then serves as a prerequisite for working and learning processes. The strategic health development plan helps to get a “clear picture” of the steps from problem – to idea – to solution and is a good base for further discussion with management and fellow employees.

Procedure and time: The strategic health development plan will be mainly filled in by the learning promoters. But for being able to initiate changes they will need support of management, e.g. time and resources. Depending on the problem that learning promoters want to tackle, even the creation of the strategic development plan might take up more than two hours.

Health promotion is a never-ending process of optimisation. Goals won't be reached immediately and not every detail can be realised. The most important point is to start the process, to identify aspects for improvement, and to keep up the process of checking, reflecting, and changing as a circular process.

### **Review of current learning activities**

The next aspect the learning promoter should look at, are the learning activities within his / her company. The basic purpose of this questionnaire is to formulate a comprehensive understanding of learning activities, informal, non-formal and formal currently taking place within the company. The questionnaire is to be completed by employees within the company with guidance and support from the learning promoter. Questions include aspects like current learning activities and barriers to work related training. Analysis of the questionnaire will show several aspects such as:

- Status quo of learning within the SME in general
- Range of learning activities
- Learning activities of individual employees
- Contentment of individual employees with his / her learning activities

Procedure and time: The questionnaire is to be completed by employees within the SME with guidance and support from the learning promoter. Results from the questionnaire should be treated in confidence. The estimated time for filling in the questionnaire is half an hour.

It is up to the learning promoter to decide on how many employees he/she wants to involve by handing out the questionnaire. This will certainly depend on the size and structure of the company. It might be advisable to start (again depending on the size of the SME) with one department and then move on step by step.

When analysing the first two aspects

- Status quo of learning within the SME in general
- Amount and type of learning activities

the learning promoter might find aspects which to be improved. For being able to find solutions, the learning promoter can again use the strategic health development plan, since the structure “from problem – to idea – to solution” is also useable for learning aspects addressing the SME in general.

When analysing the second two aspects:

- Learning activities of individual employees
- Contentment of individual employees with his / her learning activities

the learning promoter might find that some employees are not satisfied with their individual learning situation. If this is the case, the personal development plan steps in. With the help of the personal development plan, new learning opportunities can be developed.

***Please be aware that the Personal Development Plan this is an optional tool which might not come into each action within each SME.***

## **Personal Development Plan**

The personal development plan is a two-stage process

The principle functions of the personal development plan are to:

- identify informal learning activities
- identify organisational resources required to support employee learning
- outline the benefits of additional training and create a target date for when additional learning activities will be completed.

Therefore, the personal development plan will identify organisational resources required for further learning activities and act as a starting point for the development of further training provided by employees.

To be effective, the following must be ensured:

- Identify what skills and knowledge are being acquired within the SME and develop personal learning plans that record the range of learning activities taking place.
- that there is scope in the personal development plan to reflect career and job specific skills or learning activities that are not currently being undertaken by the employee and identify ways in which such skills or learning can be undertaken.
- Take into account the impact of the organisational culture of the SME on learning within the organisation.
- identify barriers to effective learning and integrate mechanisms to address these barriers into the learning action plan.

**Stage 1:** The example given below describes the case of an employee who uses their

personal development plan to highlight their informal learning activities. By highlighting the organisational resources required for the employee to meet their learning outcomes, employers are required to consider any additional resources that would need to be put in place for the learning outcomes to be achieved. It is reasonable that employees learning outcomes do not place considerable financial burdens on the employer given the limited resources available within many SMEs. This is why the personal development plan is completed as a partnership between the employee and the employer. To ensure that the Personal Development Plan is completed as a partnership between the employer and employee, it would be useful if both were to sign the document. This ensures that there is common agreement over informal learning objectives, resources required to meet those objectives and the timeframe in which they are to be achieved.

However, employers too must realise that a workforce that is able to undertake learning opportunities and strengthen its skills will enable the SME to become more efficient, more innovative and more competitive.

Within SMEs, learning promoters will introduce the personal development plan, but signing agreements and defining learning activities might be some issue just between the employee and the employer.

The focus will be on both formal, non-formal and informal training/learning activities and the ways in which those activities can be recorded and reflected back to the SME with the aim of improving awareness of the way in which learning is currently occurring and also of the way in which learning strategies can be improved.

Name of employee:				
Name of organisation:				
Date:				
<b>Informal Learning Activity</b>	<b>Organisational Resources Required to Meet Outcome for Employee</b>	<b>Benefits of the Informal Learning</b>	<b>Target Date for Outcome</b>	<b>Comments of Employee or Manager</b>
Example 1: <i>Meeting with more experienced staff</i>	A space in which the ideas and experience of more experienced staff can be disseminated to younger or more inexperienced staff	A low cost opportunity for employees to improve their skills by learning from those who are more experienced.	December 2012	Managers could consider ways in which existing space within the working environment could be changed to create a space for the informal transfer of learning and experience between employees.
Example 2: <i>Accessing professional journals and books</i>	Ensuring that the employer provides books and other literature that promotes workplace learning	A simple way in which providing employees with a space to learn and written resources then employees may learn new techniques and approaches.	August 2013	Buying professional trade magazines and other relevant literature for dissemination in the workplace would be a low-cost opportunity to develop skills.
Employee signature:		Date:		
Manager signature:		Date		

Time and procedure: Since the personal development plan is a two stage process the personal development plan should be completed approximately 2 weeks before the next stage enabling both employees and managers to start to think about some of the issues that will be raised in the action plan.

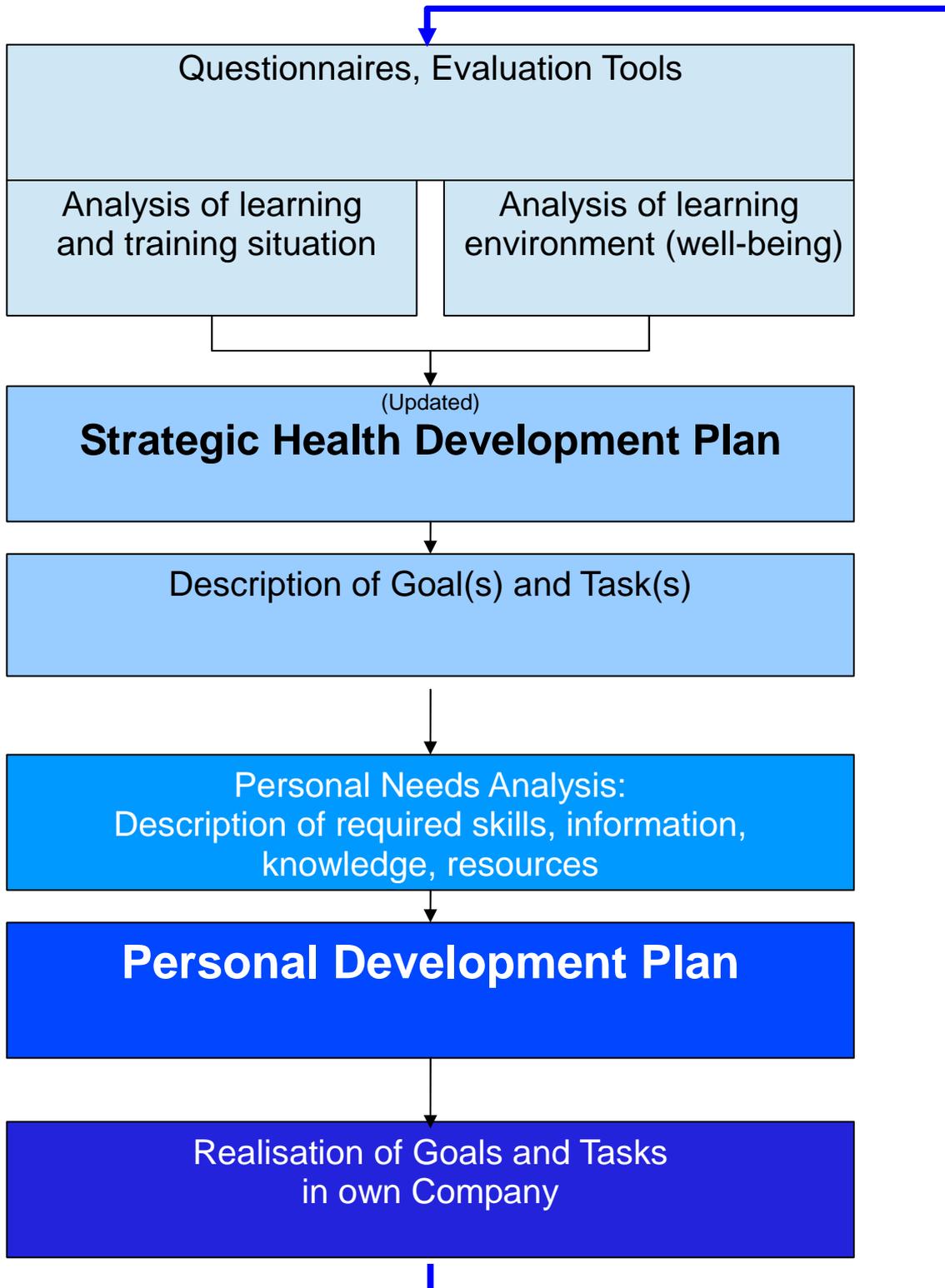
## Action Plan

**Stage 2:** The action plan is the second and final stage of the personal development plan. Each stage of the personal development plan is designed to be completed sequentially. The action plan brings together the learning objectives agreed in 1<sup>st</sup> stage of the personal development plan and seeks to establish a clear set of objectives and the timeframe in which those objectives are to be met. Again, as with 1<sup>st</sup> stage of the personal development plan it is important that employee and employer sign off on the agreed learning objectives to ensure that there is common agreement on the timeframe and the resources required to meet the objectives.

Once completed, the action plan should be followed up at a later stage to ensure that the agreed learning outcomes are being met and that the resources required to meet them have been put in place.

Name of employee:				
Name of organisation:				
Date:				
Agreed Informal Learning Outcomes	Resource/s Required	Measure of Success	Target date	Employer comments
Outcome 1	Time and contacts	Improvement in languages	Feb 2103	Relevance to job
Outcome 2				
Outcome 3				
Outcome 4				
Outcome 5				

**Diagram of the whole process**



Above you see a diagram showing the whole process. As you can see this is a process of

This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein

optimisation. Goals won't be reached immediately and not every detail can be realised. The most important point is to start the process, to identify aspects for improvement, and to keep up the process of checking, reflecting, and changing as a circular process.

## Reflection and Evaluation

Reflection: For reflection it is very useful for the learning promoter to have someone to talk to and to reflect on what has been done so far as well as on future activities. During the project duration, learning promoters will be accompanied by project partners or tutors while putting what they have learned into practise. This process is called "accompanied realisation".

If there is no tutor available, it is advisable that the learning promoter is being accompanied by someone within the SME.

It is also not only very important but also valuable for internal evaluation to continuously document of what is happening during the whole process. Another useful tool is to write a plan diary. It can be very helpful during the realization of the plan, but most of all when the time has come to evaluate the process and its results.

Evaluation: Decide upon a date for plan evaluation and decide which evaluation model you want to use. It is advisable that an assessment plan is established so as to follow-up the progress of the planned actions and introduce the necessary improvements so as to ensure that aims are achieved.

The assessment plan should define dates which serve as milestones, and ideally should include topics such as:

- Have improvements been made (since the starting of the plan implementation or since the previous milestone)? Can you describe these improvements?
- To what extent have the established aims been met? If not, describe briefly the deviations over the initial plan.
- Have the foreseen hindrances been overcome? If so, how?
- Were resources allocated appropriately?
- Have there been any unexpected benefits?
- Modifications to the initial plan (if necessary).

## **Project Partners of the HLS-project**

7 project partners from 7 nation states are working within the HLS-project.

Germany: Deutsche Angestellten-Akademie, Berlin Brandenburg-Ost  
– Project coordinator,

Contact person: Anette Deharde-Rau,

[adeharde@daatranspro.de](mailto:adeharde@daatranspro.de)

<http://www.daa-berlin.de/>

Italy: Pixel Associazione,

Contact person: Federico Fragasso,

[federico@pixel-online.net](mailto:federico@pixel-online.net)

<http://www.pixel-online.net>

Romania: Centrul de Inovare si Dezvoltare de Afaceri – CIDAF,

Contact person: Domnica Cotet

[domnica.cotet@cidaf.ro](mailto:domnica.cotet@cidaf.ro)

<http://www.cidaf.ro>

Poland: University of Information Technology and Management in Rzeszów,

Contact person: Dr. Maciej Piotrowski@wsiz.rzeszow.pl

[mpiotrowski@wsiz.rzeszow.pl](mailto:mpiotrowski@wsiz.rzeszow.pl)

<http://www.ig.wsiz.pl>

Turkey: Makro Yonetim Gelistirme Danismanlik Limited Sirketi

Contact person: Ipek Incesculu

[info@makroconsult.com.tr](mailto:info@makroconsult.com.tr)

<http://www.makroconsult.com.tr/>

Spain: Florida Centre de Formació – Florida Universitaria,

Contact person: Maria Amparo Camacho

[acamacho@florida-uni.es](mailto:acamacho@florida-uni.es)

<http://www.florida.es>

UK: Edinburgh Napier University, Employment Research Institute.

Contact person: Dr. Matthew Dutton

[m.dutton@napier.ac.uk](mailto:m.dutton@napier.ac.uk)

<http://www.napier.ac.uk/eri>

These partners can be contacted in case of any questions or problems arising in the context of implementing HLS within your organisation.

**Please read the copyright and license agreement**