



healthy learning

in SME

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HLS Training Package
Guideline for Tutors
Version 0.99c



Lifelong
Learning
Programme

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Introduction

“Healthy Learning in SMEs” (HLS) is a project funded through the Lifelong Learning Programme from October 2011 to September 2013. HLS is working to improve the productivity and growth of Small and Medium-sized Enterprises (SMEs) by improving awareness of the importance of sustainable workplace learning.

The focus of the project is on the process of learning and not on how learning takes place

The aim is to create a healthy learning environment that promotes and improves all forms of learning activities relevant to an SME

The objectives of the project are specifically

- To raise awareness within SMEs about the importance of learning at the workplace
- To train SMEs in setting up prerequisites of learning at the workplace
- To understand and describe what is needed to create a sustainable learning environment in the workplace
- To improve the general health of employees in SMEs
- To improve competitiveness of SMEs

The general situation of workplace learning in the HLE partner countries based on reviews of primary and secondary data is that SME engagement with lifelong learning activities is limited and that there is scope to improve.

Furthermore, SMEs are sometimes not aware of the fact that learning at workplace needs certain prerequisites, such as satisfied employees and a healthy social environment. Therefore, a training package has been developed which will emphasize and develop a healthy learning environment for SMEs.

The training package aims to train one or two employees from each SME who will then serve as a Learning Promoter (LP) to other employees in his/her company. The package contains a Personal Development Plan (PDP) and a Strategic Health Development Plan for SMEs. The basic functions of the training package are to

- identify existing learning activities and the personal learning aims of employees,
- create action plans enabling managers and employees to work on the fulfilment of their learning aims over a specified time period,
- evaluate the situation within the SME with the help of the Healthcheck Tool,
- implement a strategic healthy development plan for the SME. The plan is not directed towards the individual health of employees but towards the setting up of an overall healthy environment within the company which is a prerequisite for working and learning processes.

General Concept

The HLS training package course consists of three basic elements:

1. Training workshop for Learning Promoters
This can be a group workshop with several SMEs participating or as individual trainings for SMEs
2. Learning by doing
The Learning Promoters try to put their new knowledge into practice within their own company
3. Accompanied realisation phase
A tutor actively supports and accompanies the Learning Promoter in his/her work

The training workshop provides an overview of the project goals, the proposed role of a Learning Promoter, and introduces the Learning Promoter to the course materials and tools. Therefore, the workshop is only the starting point of the learning promoting process. The other elements are equally important to the success of the training.

Time Frame

The training of the Learning Promoters can take place either individually or as a group training session. As a group training, the workshop is designed to last 1 ½ days, typically one full day and one morning. However, the individual parts of the workshop can be modified to accommodate the situation and the requirements of the SMEs.

If the training is done individually for a Learning Promoter on-site, we recommend almost the same time frame. But in this case the workshop can be split up into three or four consecutive sessions.

Role of the Learning Promoter

The overall goal of the Learning Promoter is to set up a healthy working environment that helps employees learn. Of course this will not be possible without the help and support of management and other employees. But the Learning Promoter takes the leading role which is to:

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

Note: You need to be careful regarding exactly what is being reported to senior management as it implies some sort of monitoring of employees.

The Learning Promoter is thus an initiator and promoter of a healthy learning environment, rather than a specialist concerning all questions regarding health and learning. However, the Learning Promoter should know whom to approach on these issues.

Role of the Tutor

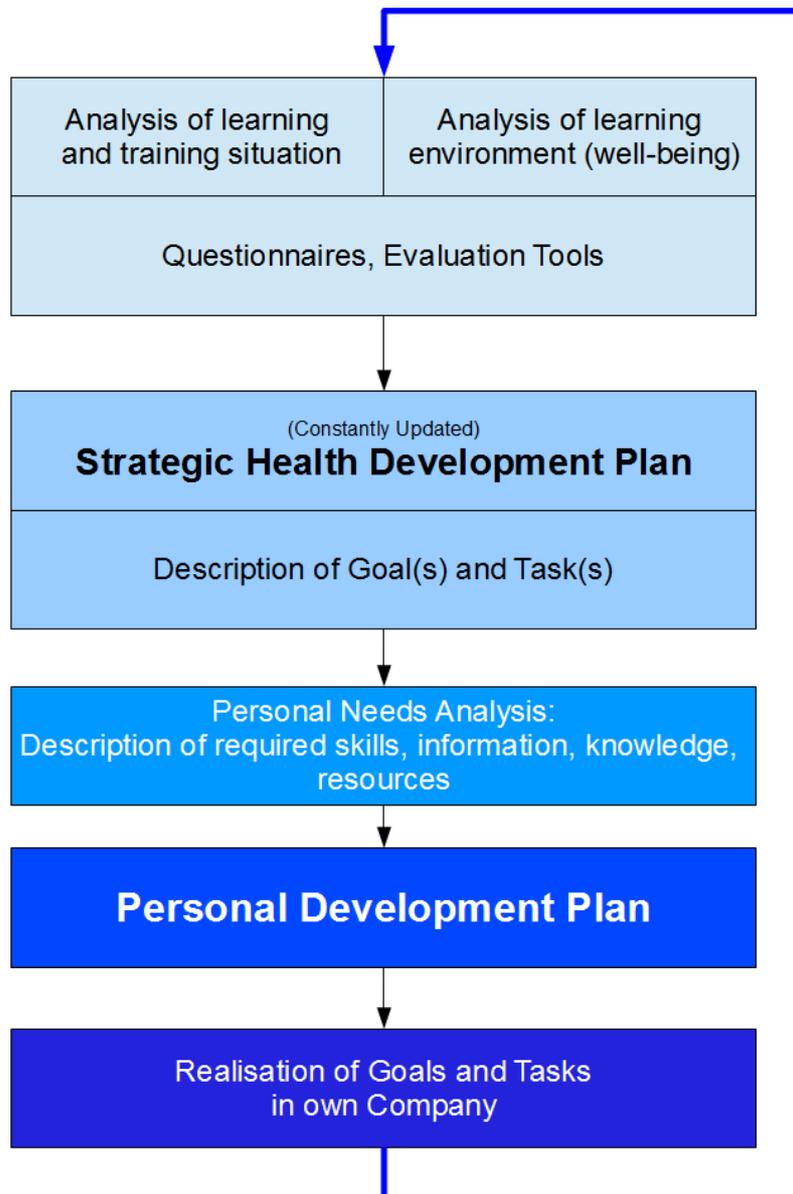
The training workshop is but a starting point for the work of a Learning Promoter. Changing a company into a “learning organisation” that promotes and enjoys a healthy work culture can be a long and challenging task. On top of that, there is no simple recipe the Learning Promoter to follow. In fact, it is very much a learning by doing task including the risk of making mistakes or going in the wrong direction.

Therefore, the project approach (see also the chapter *Accompanied Realisation Phase*) advocates reflective processes that involve partners who give feedback, either as tandem partner, tutor, or via exchange of experience with other businesses. This is in fact a crucial part of the method. Learning Promoters need somebody to talk to, share problems, exchange experience, or simply to get encouragement and feedback to their activities. Therefore, the main role of the tutor is – apart from monitoring the implementation process – to support, motivate and to give feedback to the Learning Promoter.

HLS Workshop

Overview

The general idea of the workshop is to give an overview of the project goals, the proposed role of a Learning Promoter, and to introduce the Learning Promoter to the materials and tools. The Learning Promoter is supposed to experience the same processes, methods and materials later used in the SME. The workshop activities are:



The workshop also records the individual expectations of the participants with regard to their situation and their future role as Learning Promoters. In this way, the workshop forms an important part of the evaluation process of the pilot testing period.

Suggested Structure

Day 1

Item	Name	Description	Time (min)
Introduction	Welcome	Welcome, organisation of workshops, general topics	10
	Introduction	Introduction of participants	45
	The Project	Presentation of the project, its content and goals	20
	Expectations	Recording the expectations of participants	30
	Coffee Break		30
Analysis	The Environment	Introduction to the learning environment	20
	Learning Issues 1	Forms of learning (informal, formal, non-formal)	10
	Learning Issues 2	Analysis of learning and training situation	60
	Lunch Break		60
	Health Issues	Analysis of the learning environment	60
Plan-ning	Strategy 1	Strategic Health Development Plan 1	45
	Coffee Break		30
	Strategy 2	Strategic Health Development Plan 2	60
Total			480

Note: The trainer/tutor should finalise day 1 somehow, for example with a summary of events and/or an outlook of day 2.

Day 2

Item	Name	Description	Time (min)
Planning	Welcome	Welcome, organisation of day 2, recap of day 1	15
	PDP 1	Introduction of Personal Development Plans	15
	PDP 2	Creation of individual PDPs	60
	Coffee Break		30
Implemen-tation	Action Plan	Creation of first action plan based on the PDPs	60
	Tutoring	Bench-effect: accompanied realisation phase	15
	Next Steps	Organisation of the accompanied realisation phase	15
	Feedback	Feedback session	60
Total			270

Day 1 - Introduction

1) Welcome

Description	General welcome, introduction of tutors/trainers; short presentation of the workshop structure, general topics like facilities, breaks, smoking, etc.
Goals	Participants are motivated and prepared to start the day
Method	Talk / Lecture
Materials	List of participants, name badges
Time Frame	Approx. 10 minutes
Comment	The plan is to hand out documentation such as the project description or course framework at the end of the workshop, and other materials (like the questionnaires) during the workshop. This should also be mentioned at the beginning.
Alternatives	N/A

2) Introduction

Description	Participants introduce each other and express their first expectations. At this stage, tutors/trainers do not provide feedback.
Goals	Participants know each other Participants are prepared and motivated for the day Participants describe their motives and motivation for joining the project
Method	<i>Tandem group and meta-plan technique/card technique</i> The group is split into pairs/tandems – people select their neighbour. Each tandem partner asks his/her neighbour about: <ul style="list-style-type: none"> • name, company/institution, position • background, reason to participate • wish list and expectations for the workshop/project Answers for the wish list and expectations are written down on cards. The tandem partners then present each other to the group and pin the cards to a pin-board. The following tandems try to group their cards along with the already pinned cards.
Materials	Cards, pencils, pin-board, camera, paper
Time Frame	Approx. 45 minutes
Comment	If the cards are not directly pinned onto the pin-board, but via a big sheet of paper, the cards can later be glued to the paper. This way the result is a poster that can be used in subsequent workshops (if intended). The pin-board result should also be photographed, printed and later added to the handout folder and/or communication platform. Time also depends on the number of participants. 45 Minutes should be enough even for a larger group.
Alternatives	LPs introduce themselves and state their background and expectations

3) The Project

Description	Presentation of the project, its content and goals
Goals	Participants know about: <ul style="list-style-type: none"> • the background of the project • life cycle, content and goals of the project • their proposed role as Learning Promoters • topics/workshops and (learning) goals of the workshop
Method	<i>Trainer Presentation</i> PowerPoint, Talk, Lecture, Presentation
Materials	PowerPoint presentation, national reports, project newsletters and flyers
Time Frame	Approx. 20 minutes
Comment	Standard presentation and information about the project. Focus on role of the Learning Promoter
Alternatives	Presentation can be compressed if materials like newsletters or background information like the national reports have been handed out earlier for reading.

4) Expectations

Description	Based on the project presentation, the expectations of the participants are clarified and specified.
Goals	Participants express their <ul style="list-style-type: none"> • expectations and/or • desired (learning) goals and/or • main interests
Method	Meta-plan technique/card technique The more specific expectations and goals towards the project are written down on cards, pinned to a pin-board and grouped. Expectations and goals of phase 2 (introduction) that cannot be fulfilled or approached within the course are set aside.
Materials	Cards, pencils, pin-board, camera, paper, stickers
Time Frame	Approx. 30 minutes
Comment	If the cards are not directly pinned onto the pin-board, but via a big sheet of paper, the cards can later be glued to the paper. This way the result is a poster that can also be used in the final workshop. The pin-board result should also be photographed, printed and later added to the handout folder and/or communication platform. <i>If different colours are used for the cards in the introduction and expectations phase, later identification is easier.</i>
Alternatives	If two trainers are present, the participants can simply state their expectations, goals, or interests. One trainer then moderates the activity and one trainer keeps track of the statements either on cards or on the PC (PowerPoint or a MindMap program).

Day 1 – Analysis

1) The Environment

Description	Presentation of the learning environment
Goals	Participants have an idea of the external factors influencing learning at the workplace Participants have a clearer vision of their role as Learning Promoter
Method	Talk / Lecture Powerpoint presentation “LearningEnvironment.ppt”.
Materials	Powerpoint presentation “Learning Environment.ppt”
Time Frame	Approx. 20 minutes
Comment	The presentation prepares the participants for the next steps and clarifies their role as Learning Promoters that was introduced in the presentation of the HLS project
Alternatives	Not really. This presentation should not be left out. Some slides can be cut if time is tight.

2) Learning Issues 1

Description	Presentations of informal, non-formal and formal learning
Goals	Participants know the difference between informal, non-formal and formal learning
Method	Impulse: Ask participants to write down three typical activities of their daily work. Then ask how many of these activities were part of their vocational training. If somebody answers with less than three activities, the next question is, how they learned that activity. Talk or presentation: the impulse is followed by an explanation about the three types of learning (with examples).
Materials	Paper and pencil
Time Frame	Approx. 10 minutes
Comment	These learning types re-appear later on day two (personal development plan)
Alternatives	If time is short, the impulse can be left out.

3) Learning Issues 2

Description	Introduction of the questionnaire “review of the current learning situation” and analysis of own company Discussion of results
Goals	Participants are familiar with the questionnaire “review of the current learning situation” Participants are aware that the questionnaire is filled out by their fellow employees and the analysis is based on these results Participants have exchanged experience concerning learning issues in their company
Method	<ol style="list-style-type: none"> 1. Talk / Lecture: Coming back to the last slide of the Powerpoint presentation “Learning Environment.ppt”. Focus on <i>Learning and Training Situation</i>. 2. Participants fill out the questionnaire for themselves 3. Discussion of Results
Materials	Powerpoint presentation “LearningEnvironment.ppt” Questionnaire “review of the current learning situation”
Time Frame	Approx. 60 minutes
Comment	Ideally, the participants exchange their experience among themselves. It is easier starting with the learning issues than with the more problematic health issues. Therefore, it is recommended to do the health check after the learning review.
Alternatives	There is no general recommendation how the discussion of results can be done. Based on the questionnaire, it might be a good idea to start with individual presentations of how learning/training is done and organised in the different companies. With that overview the tutor could move to topics like “training at the workplace” or “difficulties in training staff”. It might be a good idea to “save” (on cards or other means) the statements on how learning/training is done and organised in the different companies. This can be used as a base for the topic “Personal Development Plan”.

4) Health Issues

Description	Introduction of the health check and analysis of participants’ own company; discussion of results
Goals	Participants are familiar with the health check Participants are aware that the health check and the analysis is mainly done by themselves as Learning Promoters Participants have exchanged experience concerning health issues in their company
Method	<ol style="list-style-type: none"> 1. Talk / Lecture: Coming back to the last slide of the Powerpoint presentation “Learning Environment.ppt”. Focus on <i>Working Conditions & Health Policies</i> and <i>Motivation & Staff Development</i>. 2. Participants fill out the health check form for themselves 3. Discussion of Results:

	<ul style="list-style-type: none"> • Participants select three points/issues/results from the health check that are the most important for them. • The health check (without introduction) is printed on one or two pages in poster form (A2 or A1 format). Participants then use coloured stickers (maybe green, orange and red) to mark their results on that poster. • Discussion of results
Materials	<p>Powerpoint presentation "Learning Environment.ppt" Health Check form Health Check poster Stickers</p>
Time Frame	Approx. 60 minutes
Comment	<p>This is a more sensitive topic than the learning issue. Participants might not want to talk about their company at this stage. But it is always easier to stick "anonymous" tags to a poster and then talk generally about the result.</p> <p>Clusters or common problem areas that appear on the poster are good starting points for discussion and exchange of experience.</p>
Alternatives	<p>If participants are eager to talk about their company, results can be recorded by the trainer(s) either on the poster or via the PC.</p> <p>The selection of "three points/issues/results from the health check" can be varied, for example, two good and two bad practice fields.</p>

Day 1 -Planning

1) Strategic Health Development Plan 1

Description	Strategic Health Development Plan: Devising a strategy
Goals	Participants have selected one identified problem area of the health check in their company they would like to improve. Participants have devised a first strategy for improvement in that area.
Method	Talk or presentation: Explanation of the next step, that is, select an identified problem area of the health check and devise a strategy according to the provided template of the Strategic Health Development Plan. Seatwork / silent work: filling out the template form.
Materials	Strategic Health Development Plan
Time Frame	Approx. 45 minutes
Comment	As a first step, participants should neither select a problem area that is too difficult or too time-consuming to achieve, nor an area that is easily resolved (and thus does not need a strategy).
Alternatives	N/A

2) Strategic Health Development Plan 2

Description	Strategic Health Development Plan: Presenting the strategy
Goals	Participants have presented their identified problem area and their strategy how to improve the situation. Participants have received a first feedback on their strategy.
Method	The group is split into tandems/pairs or groups. Each participant presents his/her strategy to the tandem partner and receives feedback.
Materials	Strategic Health Development Plan
Time Frame	Approx. 60 minutes including finalisation of the day
Comment	In the later accompanied realisation phase, this activity takes place mainly between Learning Promoter, tutor, and management. Ideally, the exchange of ideas for a strategy on how to tackle a problem and exchange of experience between Learning Promoters of different companies is also encouraged by the tutor at a later stage. This should work with companies that are not direct competitors and work in different markets.
Alternatives	There are several options to create the tandems or groups, for example: <ul style="list-style-type: none"> • Neighbours • Try to match partners who want to solve the same or a similar problem • Try to group the participants in “general problem areas”, for example, Management, Facilities, Work, Colleagues

Day 2 - Planning

1) Welcome

Description	General welcome Short presentation of the workshop structure of day 2 Summary of day 1
Goals	Participants are motivated and prepared to start the day
Method	Talk / Lecture
Materials	List of participants, name plates
Time Frame	Approx. 15 minutes
Comment	None
Alternatives	N/A

2) Personal Development Plan 1

Description	Introduction to the Personal Development Plan
Goals	Participants are familiar with the Personal Development Plan <ul style="list-style-type: none"> • Participants are aware of the benefits of the PDP such as: initiating and promoting learning • monitoring (informal) learning • acknowledging and valuing (informal) learning
Method	Talk / Lecture / Presentation
Materials	Personal Development Plan
Time Frame	Approx. 15 minutes
Comment	Depending on the company, the participants might know other forms of personal development plans. In this case, the PDP might clash with internal procedures of a company. On the other hand does the PDP focus on learning (and is not a career plan), especially on informal learning, so it could very well exist parallel to an existing personal development plan.
Alternatives	If there is enough time, the tutor can use the results of day 1 “Learning Issues 2” as a starting point for the topic.

3) Personal Development Plan 2

Description	Creation of an individual Personal Development Plan. This plan should describe what the participant needs to learn in order to improve their identified problem area realise their strategy based on the Strategic Health Development Plan.
Goals	Participants are able to initiate and draft a PDP.
Method	Tandem work: Participants create with their tandem partner each a first PDP for themselves.
Materials	Personal Development Plan
Time Frame	Approx. 60 minutes

Comment	<p>Even if the PDP is not going to be used in the company, it is introduced this way and facilitated as a tool between Learning Promoter and tutor in the following accompanied realisation phase. As such it also serves as a monitoring tool for the achievements of the Learning Promoter and as an evaluation tool for the project.</p> <p>The Strategic Health and Personal Development Plan created in the workshop can be used as the starting point of being a Learning Promoter. In this case, these plans might require refining, but that should not be a problem.</p>
Alternatives	<p>If the Learning Promoters are going to introduce the PDP in their company, they will set up the plan for a colleague together with the colleague. Therefore, tandem work is a sensible method for this task.</p>

Day 2 - Implementation

1) Action Plan

Description	Creation of an individual Action Plan. This plan should describe what the participant needs to learn in order to improve their identified problem area realise their strategy based on the Personal Development Plan.
Goals	Participants are able to initiate and draft an Action Plan.
Method	Tandem work: Participants create with their tandem partner each a first Action Plan for themselves.
Materials	Action Plan
Time Frame	Approx. 60 minutes
Comment	Even if the PDP and the Action Plan is not going to be used in the company, it is introduced this way and facilitated as a tool between Learning Promoter and tutor in the following accompanied realisation phase. As such it also serves as a monitoring tool for the achievements of the Learning Promoter and as an evaluation tool for the project. The plans created in the workshop can be used as the starting point of being a Learning Promoter. In this case, these plans might require refining, but that should not be a problem.
Alternatives	If the Learning Promoters are going to introduce the PDP and Action Plan in their company, they will set it up with a colleague from their workplace. Therefore, tandem work is a sensible method for this task.

2) Tutoring

Description	Presentation of the accompanied realisation phase, the role of the tutor, and the cooperation between tutor and Learning Promoter
Goals	The participants have an understanding of the tutor's role and the cooperation with the tutor
Method	Talk / Lecture
Materials	N/A
Time Frame	Approx. 15 minutes
Comment	For background information on the accompanied realisation phase, please refer to chapter "Accompanied Realisation Phase"
Alternatives	N/A

3) Next Steps

Description	Presentation of the next steps in the project, especially concerning the work of the Learning Promoters and the interaction between Learning Promoters and tutor(s).
Goals	Participants are clear about the next steps to be taken.
Method	Talk / Lecture
Materials	N/A
Time Frame	Approx. 15 minutes
Comment	The next steps depend on the local situation and cannot be defined for all the partners.
Alternatives	N/A

4) Feedback

Description	Feedback session for the workshop
Goals	Participants give feedback for the workshop Participants evaluate the workshop
Method	(not necessarily in this order) <ol style="list-style-type: none"> 1. Discussion Open discussion how people experienced the workshop. 2. Metaplan Using the metaplans of day 1 as an impulse for discussion, especially the metaplans describing the expectations of the participants 3. Ratings Create cards or "whiteboard areas" with the topics: informal learning, learning at the workplace, health development plan, personal development plan, health issues, learning environment Participants get stickers they can stick to the cards or areas 4. Evaluation Sheets Project evaluation (Florida)
Materials	Cards, evaluation forms, stickers
Time Frame	Approx. 60 minutes
Comment	The methods also depend on the evaluation of the workshop planned by the partner Florida. If metaplans or stickers are used, the results should be photographed.
Alternatives	There are several ways to organise a closing session with feedback and evaluation. For example, you can vary the <i>Ratings</i> method this way: Participants mark what they found most interesting, or useful, or want to know more about. Using coloured stickers, you can also combine the ratings (participants can either distribute their stickers or put all of them on one area).

Accompanied Realisation Phase

The training workshop for the Learning Promoters is provides an excellent starting point for their proposed activities. However, the litmus test comes after the workshop: *are the participants able to transfer their knowledge into professional day-to-day practice?*

Changing a company into a “learning organisation” is not done by simple recipes the Learning Promoter can stick to. As a learning by doing task it includes the risk of making mistakes or going in the wrong direction.

Thus, the question of “What have I learnt and what do I want to accomplish with the new means, knowledge or skills?” is very important for the actual work in the company: *putting learnt knowledge and skills into practice.*

Combined with a continuous reflective process that is usually accompanied by a tutor on what has been accomplished and what still needs to be done, learning does not stop with a training course. The implementation of training into practice is therefore the most important phase of the proposed Bencheffect[®] method. The implementation phase within the framework of the Bencheffect[®] method is shaped through the following key questions:

- **Establish:** What have I learnt?
- **Decide:** What do I want to implement from the training and within what time frame?
- **Plan:** How do I establish that I am making progress in the implementation?
- **Reflect:** Have I achieved my targets within the time frame? What do I need in addition?

In this phase the learners are always accompanied by a tutor and – if possible – by other learners. Methods and means on how to implement the learned knowledge and how to keep track of progress and results vary according to the learnt topics, the desired goals and the learner type and have to be agreed upon together with the learner.

The questions mentioned above that trigger reflective practice may sound trivial, but they are rarely consciously used with traditional trainings.

- **Establish:** What have I learnt?
Quite often the participant can't really tell what s/he has learnt. Learning has not “settled down” and is difficult to articulate. Gained tacit knowledge delivers similar problems. And last, but not least, what the participant learnt, is maybe not the learning goal intended by the employer and/or the trainer.
- **Decide:** What do I want to implement from the training and within what time frame?
This question is usually easier to answer for the participant. However, especially with regard to the next question, it is important to avoid wishful thinking, and to express realistic wishes and go for a realistic schedule. Here the trainer or tutor plays an important role to counter-check the participants (and usually the employer's) wish list.
- **Plan:** How do I establish that I am making progress in the implementation?
This is a very difficult question to answer for a participant, and here s/he usually needs support from an experienced tutor. The answer involves the analysis of the individual status quo, the individual setting of benchmarks or goals, and not only a plan on how to achieve the goals, but also a method on how to measure individual achievements (all in themselves very reflective tasks).

- **Reflect:** Have I achieved my targets within the time frame? What do I need in addition?
This is the very obvious reflective task. After the proposed time frame for implementation of the training, the participants and the tutor get together (very often in an evaluation workshop) and work out what has been achieved so far, what still needs to be done, or what other and new aspects have arisen during the implementation phase.

Reflective learning can be done on your own, for example, supported by a learning diary. However, reflective practice is even more productive when organised in collaboration with another person who can act as mentor or tutor, capable of asking appropriate questions. Reflection can also be verbalised with such tools as blogs, forums, wiki, etc. where it is possible for co-learners and tutors to engage in constructive critical dialogue.

In the HLS project, the Personal Development Plan is the main tool for this process.

For further information on the Bencheffect[®] method, please refer to the [trainer's manual](#) on the [BenchTour website](#).

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