

## Assessment by Polish expert group “Training providers” according to:

**Criteria for good quality of Exemplo instruments [A]:  
Guideline for stimulating and supporting learning  
processes at work – Self-evaluation of employees as a core  
element of workplace accessible learning**

### 1. Information about the Training Institution the Expert applying the Module

#### 1.1 Country and region of the expert

Poland, Pomorskie

#### 1.2 Name of the expert

Members of National Steering Committee of Leonardo da Vinci EXEMPLO (representatives of non-public training providers): Joanna Czerska, Marzena Gadomska, Ewa Kapłan-Zielińska, Wanda Stankiewicz, Lech Kunc, Margerita Wawryszak, Rafał Rolka

#### 1.3 background of expert

state sector  employers' federation  trade union  training provider  
 consultant  SME responsible  other

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## 1.4 Scope of experiences with SME (short description)

The expert group worked under auspices of TNOiK. Most persons are employed by TNOiK or co-operate with us as experts in frame of National Services System of Services for SMEs.

## 2. Practical Usability

### Analysing the feedback in relation to proposed Guideline Stimulating and supporting learning processes at work

#### 1. Feedback about the guideline for Exemplo partners:

##### 1.1 Type of experiences

Expert answers

Practical application of the guideline in SME

##### 1.3 Is the guideline Stimulating and supporting learning processes at work a useful tool to assist SMEs in promoting competencies of employees?

- Is the guideline addressing real problems you are faced with in SME?
- Is the concept of promoting non-formally acquired competencies, assisted by external experts, described sufficiently clear?
- Are all thematic issues related to promoting competencies in SME covered sufficiently?
- Is the concept of promoting competencies in SMEs sufficiently developed
  - by operational action sequences?
  - by practical instruments and materials?

The guidebook bears the title „The Guidelines for training consultants”. The title should be changed for “**The Guidelines for internal training consultants – experienced employees**”.

The guidebook contains important issues relating to development of employees' competences and relating to non-formal learning in companies:

1. The program emphasizes worker's role as an active and aware participant of learning processes at work and not only as “training offers consumer”.
2. Huge role of self-evaluation of employees and reflection on their own workplace and problems appearing there as a base of proper training offers.
3. New approach to vocational training management in company based on it's workers' potential.

4. Employees should understand the essence of their firm's activities, their workplace's context and connections instead of thoughtless errands executing.
5. Implementation of training's results in real workplace – transfer of acquired knowledge and skills.
6. Increasing of ability to solve problems appearing at work which are the result of new acquired knowledge.
7. Introduction of procedures connected with reflection on own activities and with self-evaluation of own learning progress.
8. Determination of procedure of workshop conducting.
9. Experienced employees and/or training consultants play important role in counselling management of company how to link up learning and work processes and they inform managements how vocational training might have positive influence on production capacity and quality of work.
10. Informing employees about sources of knowledge inside the company, which they haven't used so far and new ways of knowledge acquiring – by co-workers, handbooks, specialist journals, Intranet, Internet etc.).
11. New role of training specialist as a moderator in individual learning and development projects and not only as a person simply transferring knowledge.
12. Reflection on own workplace as a place of learning (informal training)
13. Emphasis on interpersonal communication and great value of feedback.

This material also contains some important negative elements:

14. Components of single workshops which are formulated to generally needs to be detailed.
15. It is considered to be appropriate to evaluate practically the guidebook, i.e. **training of several training consultants in partners institutions (especially in SME's) and checking effects of their activities in companies.**
16. The guidebook does not contain examples, tools which may be used, concrete guidelines and arguments. **Some examples concerning the metall industry should be placed in.**

### **1.3 What about format and presentation of the guideline for promoting competencies in SME. Are procedures presented in a clear and understandable manner?**

- Are lay-out graphics and text motivating and stimulating SME employees self-learning-activities?
- Are descriptions of procedures and operational steps sufficiently simple to fit in SME employees day-to-day routines?
- Is the language of the guideline the language in SME?

1. Separate training modules should bear following titles (general description of module's objective):  
Training module 1. **Analysis of my working place. "Employee's skills matrix"**.

Training module 2. **Self-evaluation and evaluation of competencies of others. "Employee's skills matrix"**

Training module 3. **Training possibilities on the working place analysis.**

Training module 4. **Analysis of knowledge sources and information accessible in a company.**

Training module 5. **Evaluation and degree of use of internal and external training offers (Phases of individual learning and development project).**

Training module 6. **Continuous development through self-evaluation. Indicators of knowledge transfer to the working place.**

2. Too general statements used in the first part of the guidebook brings in consequence week guidance of trainers towards objectives which he wants to achieve working with a group. This remark concerns also fragments of the second part: modules objectives have been formulated too generally, while tables containing workshop conception contain following statements: "workshop scheme" or "theoretical inputs" which have not been explained.
3. It would be appropriate to put check-list more detailed as well as rules, guidelines and questions. This can help employees in analysing of training modules and further continuing and developing of own learning and development project.
4. Should be though elaborated ammendments which describe each module (e.g. exercise schemes).
5. The language used in the guidebook is the theoretical language and not practical language which is the problem in the view of low training culture in SME's in Poland.

#### **1.4 Are there gaps, mistakes or necessary improvements you detect in the instrument for promoting competencies?**

- Complexity is not sufficiently described?
- User-friendliness in terms of language, clarity and practicality should be improved?
- More practical tools and less theory needed?
- Too complex and too long for practical proceedings in a SME?
- Important subjects are missing? Which?
- What parts of the module could be changed? In which way?

## Our remarks and proposals related to particular modules:

### Module 1

It should be determined that this is very important that workers from different working groups should be members of training group. The meaning of this “mixing” is:

- acquaintance of all possible workers with processes realized outside their working group and their impact on functioning of other working groups;
- implementation to training groups people “from outside the problem” as people with independent point of view on the situation – usually in this way it is possible to see those elements of the situation which are not seen for those who deal with them in day-to-day activities. This objective may also be achieved by putting independent consultant inside the group (training moderator).

### Workshop concept – additions and comments

Goal	Contents	Time	Time Σ
Introduction	<ul style="list-style-type: none"> <li>• Presentation of the team <b>of moderator</b></li> <li>• Presentation of <b>the theme and the area of the workshop</b></li> </ul>	10	10
Becoming acquainted	<ul style="list-style-type: none"> <li>• Group survey</li> </ul> <p><b>What working place do I work</b></p> <p><b>What do I expect form the workshop (to pay attention to workshop’s theme)</b></p> <p><b>What do I like to do – this element is important to loosen the atmosphere and to present workers from other (non-professional) side</b></p>	15	25
Information on the workshop	<ul style="list-style-type: none"> <li>• <b>Presentation of workshop’s goals</b></li> <li>• Analysis of the requirements at workplaces – <b>on general level determined by the supervisor</b></li> <li>• Determining learning needs – <b>on the general level determined by the supervisor</b></li> </ul>	5	30

	<ul style="list-style-type: none"> <li>• <b>Requirements and training needs concerning following modules would be discussed between workshop’s participants. This element is important for participants because it permit them to present their own point of view and evaluate situation from supervisor’s and worker’s point of view.</b></li> </ul> <p><b>The understanding of supervisor’s point of view, companies objectives and the impact which the workshop group exert on companies processes by the moderator is very important. Workers often need to be explained why certain requirements and training needs had been formulated. Moderator is “the sense voice”, his task is not only to present a problem and to force participants to solve it, but also to explain the impact of the problem on other activities of the company. The presentation of conflict situation and elaboration of the activity plan to eliminate this situations is a consequence.</b></p>		
Problem orientation I:	<p>Analysis of the requirements at the workplace</p> <ul style="list-style-type: none"> <li>• What has changed in the past few years (months)?</li> <li>• What has become easier?</li> <li>• What have group’s <b>participants</b> been particularly successful with?</li> <li>• What has become more difficult?</li> </ul>	30	1 h
<b>Break</b>		<b>10</b>	<b>1 h 10</b>
Problem orientation	Problem discussion	20	1 h 30

II:	<ul style="list-style-type: none"> <li>• What are important problems in the work environment at present?</li> <li>• What are particularly urgent problems in the work environment?</li> <li>• Which problem should be solved in the group?</li> <li>• <b>What competencies do we have in the group – can we learn from each other or we need someone else from outside the workshop group?</b></li> </ul>	10	1 h 40
Planning of the CLP	<p>"Homework"</p> <p><b>Objective formulation</b></p> <p>Problem analysis – <b>what competencies do I need to achieve goals?</b></p> <p>Action plan – <b>competence development plan</b></p> <p>Assignment of roles – <b>who will teach who and what</b></p> <p><b>We would change the order – problem analysis, objectives, plan and roles should be elaborated working with the consultant. Objectives realization may be the homework. Nevertheless before the homework participants must elaborate the form of progress evaluation / the degree if they learned something</b></p>	15	1 h 55
Feedback on the workshop	<p><b>"Spotlight"</b></p> <p>How did I feel in this workshop – <b>Have my expectations been fulfilled?</b></p> <p><b>Do I see any threats during realization of the tasks plan and what are they?</b></p> <p><b>Do I believe the implementation is possible without any problems?</b></p>	5	2 h

	<p><b>What can I have problems with during the implementation? – very difficult element – during first workshops it is not expected that participants may answer this question but attempts are welcome, stressing that in our opinion the task is to determine training needs and problems solution and not to point on lacks of knowledge and skills of participants</b></p>		
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### Proposals of text modifications

Checklist: Tasks and competences

- What tasks do I have to perform?  
This concerns the tasks that you have to perform in your current function. If you think about it, you will realize that all tasks are not equally important. **If so, the next point should be te determination of priorities for these tasks.** Some tasks take up a large part of your working hours, while others only occur occasionally.
- **What competencies I would like to develop bearing in mind organizational, social and professional skills related to realization of companies objectives, i.e. given tasks**

## Module 2

**Additional attention may be put to the relation employee – supervisor, there are many hinders on this line.**

Workshop concept – **additions and comments**

Goal	Contents	Time	Time $\Sigma$
Information on the workshop	<ul style="list-style-type: none"> <li>• Greeting</li> <li>• Goals of the workshop</li> <li>• Schedule of the workshop</li> </ul>	5	5
Reflection on the project status I	Presentation of the work results by the learning group – <b>the training group work effects should be determined by the</b>	25	30

	<b>end of the previous module. It is not known what is its effect</b>		
Reflection on the project status II	<p>Guiding questions:</p> <ul style="list-style-type: none"> <li>• What has helped us to advance? <b>Does this advance concern the working place or the workshop?</b></li> <li>• Where were there difficulties?</li> </ul> <p>Questions from index cards and discussion</p>	30	1 h
<b>Break</b>		<b>10</b>	<b>1 h 10</b>
Problem orientation	<p>Guiding questions:</p> <ul style="list-style-type: none"> <li>• <b>Which problems can we solve and what way?</b></li> <li>• <b>Can we develop what has been already done?</b></li> </ul> <p><b>You cannot ask straight questions, consultant's role is to ask in that way so to achieve information. Asking straight questions often cause problems to define action plan by workers. During the training they will learn to answer straight questions but it will take time, at least a half year</b></p>	30	1 h 40
Communication	<p><b>What disturbs us in communication?</b></p> <p><b>Workers easily talk what is "bad" and then define how this "bad" should be solved. The answer on the question how should be cause that we concentrate on "wantings" and not real problems. Attention must be paid to generation of solutions which can be easily implemented, would be possibly costless and easy to use</b></p> <ul style="list-style-type: none"> <li>• Feedback and criticism</li> </ul>	20	2 h

Planning of the CLP	<p>"Homework"</p> <p>List: What rules can help us in our everyday work? – <b>theoretical input</b></p> <p><b>How these rules should look like? – create the map of communication – who with whom, how and when</b></p> <p>Assignment of roles – <b>implementation plan</b></p>	15	2 h 15
Feedback on the workshop	<p>"Spotlight"</p> <ul style="list-style-type: none"> <li>How did I feel here in this workshop? – <b>comments as above in module 1</b></li> </ul>	5	2 h 20

**Comments:**

The rule for the person who feedbacks – **this concern not only the feedback but the communication itself**

**Module 3**

**The working group leader should be pointed. Due to possessed knowledge and skills this should be a person who can be asked to help.**

Workshop concept - **additions and comments as above in previous modules and also:**

Problem orientation	<p>Recognizing knowledge sources in one's own work environment – <b>what are these sources? What do they concern? Lack of information on this theme</b></p>	20	1 h
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**Module 5**

Workshop concept – **additions and comments as above in previous modules**

**Comments and proposal of text modifications:**

Obtain preliminary information

- Discuss personal development plan (where do I want to go?) with executive – **here should be placed the form of personal development containing the instruction; this form is the integral part of documentaion of learning process in the company**

### **(planning of development and evaluation of development)**

Transfer to the work situation

- Discussion with executive about consequences of the further training measure. Detailed report – **operational worker will not do this, make suggestions! – this may be required but the training should contain the element of elaboration of solutions for each participant, even in schematic way**

Evaluation and improvement of the further training measure

**Here should be placed the form of training evaluation together with the instruction. Generally the form may serve to select trainers and checking ways of use of acquired knowledge on a working place.**

## **Module 6**

**Workshop concept – additions and comments as above in previous modules**

**Training evaluation should be checked by evaluation of skills of practical use of acquired knowledge; it should be clearly defined who will evaluate and check (self-evaluation, supervisors, coworkers, members of training group?). As a result should be evaluation indicators with determined objectives for each (?) worker.**

### **1.4 What about practical experiences when implementing the instrument in SME practice. Did you try out sequences of the module in your cooperation with SME?**

√ No practical implementation in SME

Yes:

- Which sequences?
- How many SMEs did you assist in their training efforts, utilizing the instrument?
- Was the instrument helpful in your practical cooperation with SMEs?
- Are you planning to utilize the instrument in the future?

## **3. Usability beyond specific enterprise cultures**

Please answer these questions in an open way; the following questions might provide some orientation, but we expect you to explore the field in a wider sense:

-  How flexible is the instrument in all?

- ✚ Is the guideline related to specific sectors?
- ✚ Is the guideline related to specific labour markets?
- ✚ Is the guideline related to specific company backgrounds?

1. The process of self-shaping workplace by employee and his or her independent learning could be recognized in a different way by employer and worker himself or herself. The great role in recognizing this processes can play habits and difficult to change stereotypes in behavior of both sides. This statement is not critical to the guidebook's text but indicates problems which could appear and need to be solved.
2. The tool is flexible as it has the form of general procedure which do not concern defined sectors, labor markets or companies character.
3. In order to improve these processes, the following should be done:
  - to establish a model or to give a suggestion to choose motivation systems of employees to encourage them to acquire new skills or improve possessed skills,
  - to define proposed standards and forms of giving workers the information about company's objectives and activities and about ways and possibilities of practical using new workers' skills (here would come out the differences between countries, because communication culture with employees is different),
  - to create examples of schemes of transfer of company's objectives to fields', departments', workers' or their groups' aims in order to make possible to inform workers about the aims they must achieve and how they can do it. The worker's demands should be defined and included in his or her position describing cards and list of obligations. This is a tool of pressing for workers in order to connect their activities in company with it's aims achievement. This was mentioned in the guidebook but not strongly enough,
  - to create exemplary schemes of auditing of aims achievement. The 6-steps process of self-evaluation which is proposed in the guidebook does not enable making proper evaluation of learning process and of purposes achievement.
4. Vocational training program described in the guidebook is directed to specialist skills development. It wouldn't however reduce the possibilities of workers' development in context of general skills acquiring, which are helpful for people to absorb the changes in company's activities and it's environment.
5. Considering our conditions we should motivate and praise experienced workers in such way that they would share their knowledge with coworkers. They often do not want to do this because they think that they harm their position inside the company (because others become as good as them), they believe that they waste their time and noone praisie them.
6. It is necessary to organize workshops for training specialists in order to acquaint them with this training program.

#### 4. Usability independent of specific national vocational training systems

Please answer these questions in an open way; the following items might provide some orientation, but we expect you to explore the field in a wider sense:

- ✚ Is this instrument usable independently of specific national training systems?
- ✚ Is this instrument usable independently of specific national certification/assessment systems?
- ✚ Is the instrument applicable to employees from different cultures?

If this tool is to be implemented to processes of knowledge management in companies it may be useful independently of specific training systems as well as evaluation systems and systems of certification of competencies used in different countries.

For workers from companies where training culture is on quite low level, acceptance of this tool may be difficult on the beginning due to used terms, not clear and comprehensible.

## **The assessment of guideline „Stimulating and supporting learning processes at work” made by Polish expert group of Social Partners and Companies.**

1. This assessment was made by following experts:

- Stanisława Gatz – trade union Solidarnosc, European Projects Coordinator,
- Teresa Razny – trade union Solidarnosc, European Projects Coordinator,
- Kazimierz Lewandowski – Cemet Ltd. (SME), Director,
- Arleta Bohowicz – CETO SA (SME), Manager of Human Resources Development and Management Organization Department

2. Practical usability

2.1.1. Feedback about the guideline for Exemplo partners is based on Experts answers.

We think it is purposeful and necessary to test this tool in minimum few companies, even instead of other tasks. In our opinion, only the trial of practical using of this instrument in firms, after necessary improving changes, will make the real assessment possible. It could probably happen, even if the other activities in this project need to be reduced and if it needs budget changes.

2.1.2. The guideline refers to problems with knowledge transfer, learning in the workplace during work process and to communication among workers. These problems exist in SMEs although sometimes they are not defined clearly. The guidebook can enlighten employers and employees of existing problems and inform them of problems' importance. The question of learning and sharing knowledge is important in every company. It must be also taken into account employees' aversion to learning at work and sharing their knowledge with colleagues, that sometimes appears in companies.

The concept of improving and assessment of non-formally acquired competencies with accompaniment of external consultants is not described clearly enough. The training experts/consultants' role was indeed defined readably. However if we consider defined there demands for consultants, they must be either internal trainers who know the company's structure and processes or external consultants who should learn all these questions before training. Demands in the area on vocational training and human resources management could be too high for the internal trainers, for example for experienced foremen who could play a role of such trainers in small companies. In practice, because of necessity of using external experts and the need of their entering into company's realities, the whole process could appear too expensive, too complicated and too time consuming. In our opinion, this instrument is not helpful to conduct learning process by direct superiors of ordinary workers, because it's too abstract.

However all topics connected with development of competences are involved in the guideline. The tool relates to definition of "competence gap" and the process of this gap filling through learning at work, learning process assessment and final result – evaluation of new acquired competence or higher level of previously possessed competence.

The concept is generally good, but there is lack of actual solutions useful in every step of this tool. For example it's not indicated how to define

“competence gap”, how to implement the training and how to assess it. This problems are treated rather perfunctorily.

The role of experienced employees is not taken into consideration, but the project Exemplo concerns them.

The scheme of workshops is generally good but not enough to realize the training process in practice.

In the training scheme there is no reference to previous experience.

All concept needs to be supplemented by more detailed materials. There is lack of actual methodological methods and of exemplary training programs. The guideline is consider to be only a base for actual training activities.

- 2.1.3. In our opinion the format and presentation is not motivating to self-learning activities and entering it into practice. Text and graphics don't stimulate to self-acting. There is too less pictures and charts, text is too monotonous. The language is not a language of companies (SME). So it could be used only by professional trainers, not by internal trainers (experiencesd employees). The description of procedures are too general and because of that it is difficult to use it in practice. Procedures are too teoretical and complicated to be implemented succesfully in SMEs. Probably the additional, actual materials should be supplemented which will help to implement the process in companies.
- 2.1.4. The complexity is not sufficiently described. The language should be easier. The guideline should include more tips and proposals of actual solutions. It would be useful to include real activities simulation. First of all, the role of older employees is ignored in the guideline although their participation in the process of competence development is very important in Exemplo. All area of experience transfer from older workers and their usability is ignored.
- 2.1.5. The tool was not tried out in practice in SMEs.
3. Because of high level of generality, the guideline can be used in every sector for every workplace and every competence. For practical using, the less theoretical approach is needed.
4. The tool is conformable to european standards of considering of non-formal and informal lerning.

## Assessment of the guideline “Stimulating and supporting learning processes at work” made by Polish expert group of Public sector

Members of the group:

- Jerzy Ochotny: provincial school superintendent,
- Alicja Zajączkowska: vocational school head master,
- Zbysław Etmański: chief of vocational school workshop,
- Barbara Orlik: vocational school head master,
- Jerzy Ambroży: vocational school head master,
- Marcin Mazuryk: representative of Ministry of Economy and Labour

1. Format and language of the guideline are not very readable, some fragments could be not understood in Polish realities.
2. Language is too sophisticated and it could be a reason that the concept of self-organized learning could be unintelligible.
3. For recognition of employees’ self-development needs, it seems to be positive that training consultants fulfill their tasks in company, are considered as:
  - people supporting solution of internal problems in work process,
  - people supporting analysis of the problems,
  - people creating models and ways of problems solution.
4. The priorities of vocational training process will be determined in practical way, it will be suitable to employees’ needs and it will be useful,
5. The concept of workshop modules is interesting and is a practical form of identifying:
  - problems in company,
  - training needs,
  - problems within training group,
  - objectives (tasks and competencies).
6. Tips and materials to facilitate discussion support well the self-learning process thanks to analytical, feedback-making and tabular form of presentation. They promote assertive attitude towards firm’s activities directed to objectives achievement.
7. The concept of continuous learning phase should be described more clearly,
8. In module 6 there is proposal of modification in “Tips”: **Analysis of success in learning and development process,**
9. After detailed analysis of six learning modules the experts formulated following conclusion:
  - **The guideline should be an integral part of procedure supporting self-organized learning of employees in the company,**
  - **The guideline should be improved stylistically (to be intelligible in Polish firms),**
  - **The guideline should be disseminated as a tool supporting self-organized learning in SMEs.**