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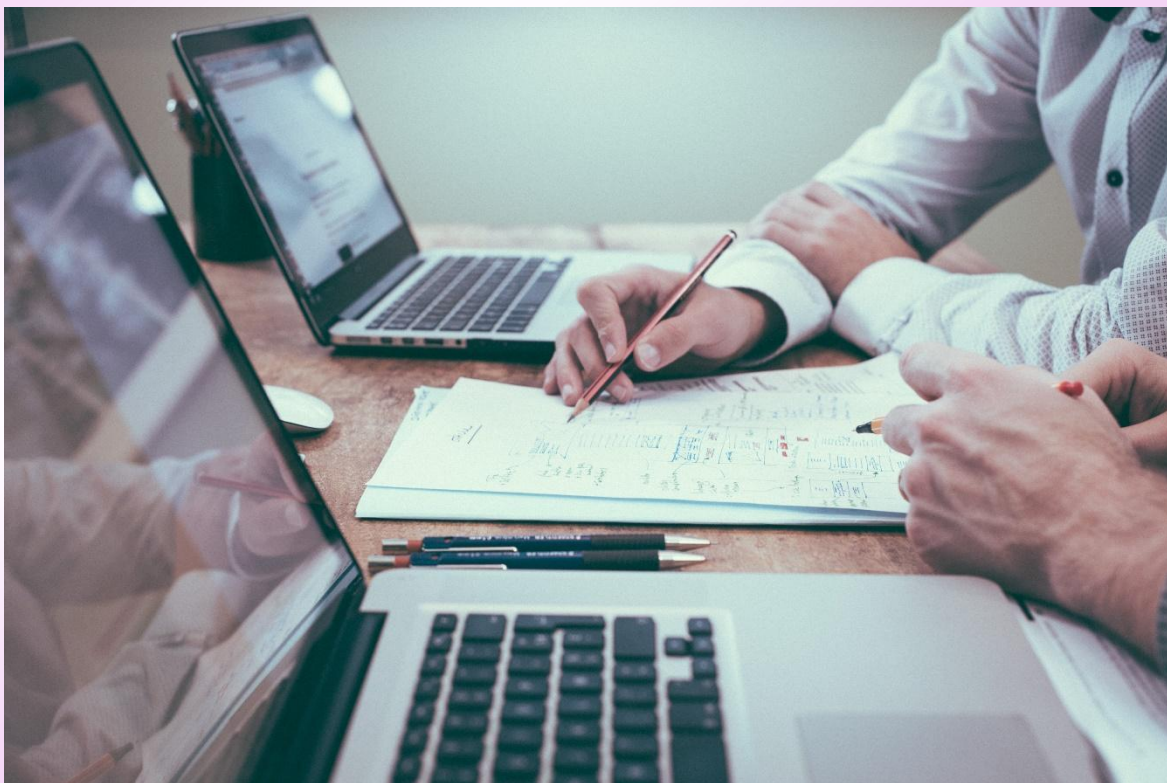
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Needs research and assessment of the strengths of HR in educational organizations

Project 2022-1-BG01-KA220-SCH-000085347

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Title „Needs research and assessment of the strengths of HR in educational organizations"

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I.   Project information

This document is part of Project 2022-1-BG01-KA220-SCH-000085347 „Healthy at school. Supporting the well-being and mental health of students and teachers/ HAS ", Erasmus+ program, with the financial support of the European Commission.

Project period: 01/11/2022 - 31/10/2024 (24 months)

Leading organization: Association of Psychologists in Bulgaria, Varna, Bulgaria

Partner organizations: Hristo Botev School, Bulgaria; IMS Private School, Cyprus; and WYZSZA SZKOLA BIZNESU I NAUK O ZDROWIU (WSBINOZ), Poland.

The mission of the project is to modernize and strengthen the capacity of the education and training system to address the main challenges in today's world, to improve mental and physical health and well-being (incl. of teachers/trainers and students/trainees), to promote social, civic, and intercultural competencies, and intercultural dialogue. This mission is achieved through the development of the products in accordance with the individual needs of both trainees and trainers, and partner schools at the organizational level.

The project's aim is also to help deal with the unfavorable learning conditions caused by the difficulties in online learning, social distancing, and immobility. It focuses on the improvement of basic skills as a prerequisite for the prevention of early school leaving, incl. from vulnerable groups.

The main project objectives are:

- Increasing the knowledge of mental health, safety and management of psychosocial risks;
- Overcoming the consequences of social isolation and immobility;
- Overcoming and preventing stress and difficulties in online/distance learning and teaching;
- Increasing students' motivation to learn;
- Improving the mental health and wellbeing of teachers and students;
- Increasing the motivation for teaching and career development of teachers;
- Providing opportunities for career and personal development, increasing the professional capacity and basic skills of teachers and other educational staff;

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- Greater effectiveness of activities for vulnerable groups in the field of inclusion and diversity education;

- Creating mutual assistance and intervention groups;

- Promoting common values, civic engagement and participation.

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II. Introduction

The current product – "Needs research and assessment of the strengths of HR in educational organizations" is developed under Work Package 3 "Increasing competitiveness and employment in the field of school education", Activity 1 (WP3 A1) of project "Healthy at school. Supporting the well-being and mental health of students and teachers / HAS", funded under the Erasmus+ programme. The main **users** of WP3A1 "Needs research and assessment of the strengths of HR in educational organizations" are teachers/trainers/educators and non-pedagogical/non-teaching staff (such as administrative staff, management staff, counsellors, pedagogical advisers, psychologists and other experts) from different educational/training organizations.

The product Needs research will serve as a basis for the development of an HR Development Plan for each partner organization, as well as the development of products WP3A2 Strategy for planning the professional development of employees in accordance with individual needs and WP3A3 Training program for staff in educational organizations. How to increase the capacity of staff.

The product is the result of a staff survey in the three partner organizations: Hristo Botev Primary School in Bulgaria, IMS Private School in Cyprus and WSBINOZ in Poland.

The product's General objective is: Capacity building of schools to work transnationally and between sectors. The Specific WP 3 objective is Needs research and learning about the strengths of HR in schools.

The main **tasks** of the product are to**:**

- Provide a detailed assessment of the needs and strengths of HR in educational organizations (through interview assessment);
- Provide an analysis of future labor requirements in organizations;
- Provide detailed information on how to create an HR Development Plan for organizations (steps to creating an HR Development plan, additional tips, and other).

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III.   Development of an interview assessment of the needs and strengths of HR

1.   Purpose of the interview assessment

The **purpose** of the interview assessment is linked to the general objective of the project - Capacity building of schools to work transnationally and between sectors, and to the specific Work package 3 objective: Needs research and learning about the strengths of HR in schools. Achieving the purpose of the activity is connected to exploring the factors, specific obstacles, and potential of educational organizations and to the development of an effective and efficient toolkit to increase their capacity at both organizational and transnational, and personal levels.

In addition to these objectives, the **purpose** of the interview assessment is to evaluate the qualities, skills and goals (both personal and professional) of the educational organization staff, their current needs, their current working conditions, their main challenges in working with students / trainees, their opportunities for development, and others. Some additional variables are also taken into account, such as: levels of workplace stress, staff turnover (defined as the rate at which employees leave an organization and are replaced by new people), the stability and security of the job itself, the provided support at work, the overall working environment and other important factors that need to be considered. The main expected result from the activity will be Conducted research, needs assessment, and identification of the strengths of Human Resources (HR) of the three educational organizations within the partnership – Hristo Botev Primary School (Bulgaria), IMS Private School (Cyprus) and WYZSZA SZKOLA BIZNESU I NAUK O ZDROWIU - WSBINOZ (Poland).

The **target group** of the study is 50 employees / staff from each of the three educational organizations (150 employees / staff in total participate in the current study). The interviews with educational organization staff and governing bodies are conducted with the purpose to understand the main issues and opportunities of the current workforce. The Association of Psychologists in Bulgaria (APB) is responsible for preparing and developing the tools for the interview assessment (in the form of a structured interview) and the analysis of future labor requirements.

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The structured interview is available on paper in English, Bulgarian, Greek and Polish, as well as online on Google Forms. Afterwards, each educational organization is responsible for analyzing the results from the interview assessment and for preparing a report. On the basis of the obtained results, valuable conclusions and recommendations are made.

After the assessment and study of the strengths of HR a HR Development Plan was developed by each educational organization in Bulgarian, English, Polish, and Greek. Proper HR planning helps organizations accomplish their goals on time and with the right HR power in place.

2. Methodology and data collection

The chosen **methodology and data collection method** for the study of the needs and strengths of human resources (HR) in educational organizations, is the **structured interview method**. This is a quantitative method for data collection but can also be applied in qualitative research in the field of social sciences and other areas. It is one of four common types of interviews (structured, semi-structured, unstructured, and focus group interviews) but is substantially different from the others, since it includes questions which are predetermined in subject and set order.

The structured interview is the most systematized type of the abovementioned methods. Although most structured interviews are closed-ended (with yes / no questions), open-ended questions are also included for the purpose of more clarity and detail. Open-ended structured interviews such as this are less common, but can also be applied to social sciences research (George & Merkus, 2022).

This method was also chosen because there are many advantages to the structured interview, such as the researcher being able to compare answers between respondents easily since the questions are in a set order. This can support the finding of important patterns in the data.

It's also crucial to know when exactly it is suitable to apply a structured interview. This method is used primarily when:

- There is a clear understanding of the topic that is being explored;
- There are constraints in time and/or resources needed for efficient data analysis;
- The research question depends on the equality between participants, ensured by the constant environmental conditions.

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Another advantage is that the structured interview is very straightforward to apply, and the same question set and order makes sure that biases and ambiguities are mitigated during the analysis phase.

However, some of the disadvantages of the method are that designing the questions can be somewhat challenging and the researcher needs to have a good understanding of the subject that is being studied. That is why, many such structured interview questions go through a pilot phase, before the real application of the interview assessment takes place.

It is also very important to choose the most appropriate **type** of interview for the study. This is done by acknowledging the differences between the different types of interviews.

Unlike the other types, the structured interview is unique because it has fixed questions, order of questions and number of questions. However, there is no option to ask any additional questions that are not previously specified. The good thing is that these characteristics reduce possible bias and increase credibility, reliability and validity which are all important aspects of a research. In addition to this, structured interviews are more simple, cost-effective and efficient, and less time-consuming compared to other types of interviews (they are very similar to a questionnaire or a survey).

In contrast to the structured interview, the semi-structured interview does not have a fixed order and number of questions, and has the option to ask additional questions which were not previously specified. On the other hand, the unstructured interview does not have fixed questions at all, whilst the focus group interview has similar characteristics to the semi-structured interview as regards the order and the number of questions.

However, certain negative aspects of the structured interview should be taken in to account, such as the rigidity of structured interviews (being too formal) which can affect the replies; the limited flexibility (the questions cannot be changed, or else this will affect the interview's quality); and the limited scope (this disadvantage does not apply to the current study, as the interview includes open-ended questions which enhance the scope).

In conclusion, structured interviews are one of the most reliable and straightforward methods for data collection. That is why this method was chosen as most appropriate for the current study in order to assess the strengths of HR in educational organizations.

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Used source: George, T. & Merkus, J. (2022, January 27). Structured Interview | Definition, Guide & Examples. Scribbr. Retrieved July 3, 2023, from https://www.scribbr.com/methodology/structured-interview/

3. Target groups of the study and sampling method

The **target groups** of the current study for assessing the strengths of human resources in educational organizations are 150 staff / employees working in the three educational organizations within the partnership (50 staff / employees for each organization - Hristo Botev Primary School (Bulgaria), IMS Private School (Cyprus) and WYZSZA SZKOLA BIZNESU I NAUK O ZDROWIU - WSBINOZ (Poland).

The participants in the study include: teachers / trainers; administrative staff (for example, accountants, administrators and others) and other educational organization staff (such as school counselors, pedagogical advisers, speech therapists, psychologists and other experts). It was determined that 50 employees/ staff per organization (150 participants in total) are sufficient for the purposes of the research. The sample was chosen on the basis of location (staff / employees currently working at the respective educational organization).

The **sampling method** was carefully chosen for the purposes of the current study – convenience sampling. This is a non-probability / non-random sampling method in which participants are included in the sample due to their easy accessibility (in this case, staff / employees currently working in the respective educational organization). They were selected because they were readily available to do the interview and volunteered to participate in the study and contribute. In contrast, in probability / random sampling methods, each individual has an equal chance of being selected for the sample. Whilst in the case of convenience sampling, not every individual has an equal chance of being chosen for the sample.

This sampling method was also chosen because it is often applied in qualitative and social science and educational research. It is also very convenient to use pre-existing groups such as the staff /employees who are already working in the respective educational organizations. It was determined that convenience sampling is also appropriate for the current study because the objective is to assess employees' attitudes and opinions on the strengths, challenges and needs of human resources.

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However, the main disadvantage is that convenience sampling can be prone to different types of bias, such as selection and sampling bias. Because the sample is chosen on the basis of convenience and not on equal opportunity, the selection cannot be statistically balanced, and this can cause sampling bias which occurs "when some members of a population are systematically more likely to be selected in a sample than others" (Bhandari, 2020).

In spite of this, there are several effective ways to reduce biases associated with convenience sampling:

- Describe thoroughly the process of selecting the participants in the methodology part;
- Include as many participants as possible to make the sample more representative of the population;
- Apply suitable analysis methods (appropriate for non - probability samples);
- Avoid generalizations to the whole population.

Many qualitative studies, especially in the social sciences such as psychology, rely heavily on convenience samples. This unfortunately can limit external validity which is defined as "the extent to which you can generalize the findings of a study to other situations, people, settings, and measures" (Bhandari, 2020). This can be avoided by including as many and as diverse participants as it is possible.

Every sampling method has its advantages and disadvantages. It's crucial for the researcher to know them well, so that the proper sampling method can be chosen for the research in question. The advantages of convenience sampling are the following:

- Low cost;
- Easy to apply;
- Participants are readily available;
- The convenience sampling method allows the researcher to collect data that it would not be possible to gather, if he/she applied another method of sampling instead.

However, there can be some disadvantages to convenience sampling depending on the study. Because the sample is not selected randomly, it is therefore not representative of the whole population (for example, the results of this study would not apply to all teachers or other staff at educational organizations from over the world). This limits the ability to make generalizations on the basis of the results obtained from this sample.

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It is also a fact that to get replies only from individuals that are easily accessible can exclude many other possible respondents. This, of course, can have a negative impact on data accuracy, and can lead to bias. According to Nikolopoulou (2022): "convenience sampling relies on the subjective judgment of the researcher and the subjective motivations of the participants. This leads to a high risk of observer bias".

In conclusion, it is very important for the researcher to know the advantages and disadvantages of the chosen sampling method. Convenience sampling was selected for the current study which targets 150 employees / staff (50 from each educational organization within the partnership – Hristo Botev Primary School –Bulgaria, IMS Private School – Cyprus and WYZSZA SZKOLA BIZNESU I NAUK O ZDROWIU - Poland).

Used sources:

Bhandari, P. (2020, May 08). External Validity | Definition, Types, Threats & Examples. Scribbr. Retrieved July 10, 2023, from https://www.scribbr.com/methodology/external-validity/

Nikolopoulou, K. (2022, August 09). What Is Convenience Sampling? | Definition & Examples. Scribbr. Retrieved July 10, 2023, from https://www.scribbr.com/methodology/convenience-sampling/

4. Interview questions

(focusing on the needs and strengths of HR in educational organizations, the main issues and opportunities of the current workforce)

The interview questions for the WP3A1 Structured interview for assessing the needs and strengths of human resources (HR) in educational organizations were carefully designed and selected. The final version of the interview includes 14 questions in total, nine of which are open-ended and five of which are close-ended questions (Yes / No questions). There are also five separate questions left for data (including demographic data) such as name of the educational organization, name of the participant, gender, age and profession.

All questions (except for those assessing the demographic data) focus specifically on the needs, strengths of human resources in educational organizations and the main issues and opportunities

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of the current workforce. The template of the structured interview can be found in the VIII. Appendix section (Annex 1 - Structured Interview Template).

The first part of the structured interview includes questions for gathering demographic data. The first line of the interview can include the following data: Name of the organization: Hristo Botev Primary School (Bulgaria), IMS Private School (Cyprus) or WYZSZA SZKOLA BIZNESU I NAUK O ZDROWIU - WSBINOZ (Poland) depending on the educational organization within the partnership from which the participant in the study is (the options in the current study are only three).

The second line includes the name of the individual, whilst the third line focuses specifically on the gender. The fourth line includes free space for the participant to state their current profession at the respective educational institutions (for example, they can be a teacher, psychologist, speech therapist, pedagogical advisor, school counselor, accountant, inventory manager, resource teacher, hygienist, and other possibilities).

The second part of the Structured interview consists of the main body and focuses on the nine open-ended and five closed-ended questions (14 questions in total). The first question deals with the personal qualities of the employee / staff and they are asked to list three of those characteristics in the vacant spaces left below. The second question is quite similar but focuses on three professional qualities and skills of staff instead (again, employees are asked to list them in the vacant spaces left below).

The next question assesses the personal and professional goals of the employees working currently in the educational organizations. It was chosen to be worded as an open-ended question, so as to not limit participants in their answers. The same thing applies for the fourth question which states: "In what direction would you like to develop your potential?". Here, the answers can be very diverse and need to be analyzed through both quantitative and qualitative analysis for better precision.

The fifth question from the structured interview seeks to evaluate the current needs of other educational organization staff / employees (not the needs of the person answering the question). Again, the question is worded as open-ended because the answers can be very different depending on the individual's perspective and opinion on the topic. The sixth question states: "What are your needs?", thus, the query is directed specifically toward the participant in the study and focuses on their current necessities at work.

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The next question assesses what the participants in the study would change in their present working conditions, whilst the eighth question evaluated what are the main challenges of staff / employees when they are working with students / trainees. Lastly, the final open-ended question seeks to find out what opportunities do the respondents see for the development of staff at the respective educational institution.

The next part of the structured interview consists of five closed-ended (Yes / No) questions. The tenth question states "Do you think that school staff deal effectively with workplace stress?". This query indirectly relates to the negative consequences of the past COVID-19 pandemic and the distance teaching period. It seeks to evaluate whether employees at the educational organizations implement effective strategies to tackle stress at work.

The next question assesses whether participants in the study believe that there is staff turnover among employees at the educational institutions. This is an important question, as turnover and attrition rates at the workplace are typically associated with unmet staff needs (which may be related to compensation, the work environment itself, heavy workload, challenges with students, parents and/or co-workers, and many other factors), low job satisfaction, high professional burnout and (di)stress levels which have not been dealt with accordingly and in time, etc. (Allen, 2022).

The twelfth question asks participants whether they feel their current job at the educational organization is stable and secure. This is crucial to assess because employees' feelings of stability and security at work is a strong aspect of HR, which raises their overall levels of job satisfaction, productivity and motivation for professional development and achievements, which in turn contribute to the better academic performance of students. On the other hand, the next query focuses on whether employees feel that they are provided with sufficient support at the educational organization they work at. This is also important to analyze, since sufficient support from the institutions contributes to better work performance, motivation and productivity. In general, educational organization staff who receive support for their continuous professional development and who participate in decision-making at work tend to be more satisfied with their terms of employment (OECD, 2020). Expectedly, employees who are more satisfied with their work conditions and environment are less likely to leave their job prematurely.

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Finally, the last close-ended question deals with whether the respondents believe that the current work environment contributes to the educational staff's personal and professional development. This is also valuable to assess as it is also linked to attrition / turnover rates among employees, motivation and productivity levels, and overall work performance.

In conclusion, the structured interview questions were very carefully chosen in order to assess correctly the needs and strengths of human resources (HR) in educational organizations. Both open-ended and close-ended question formats were selected due to their numerous benefits (open ended questions give the opportunity to the participant to express his/her true feelings and opinions about the topic being studied, while close-ended questions give more structure and guidance). In this way, participants can provide detailed answers which provides a clearer picture of the needs, challenges, and opportunities of the current workforce.

Used sources:

Allen, L. (2022, March 24). 5 ways to reduce teacher turnover rates at your school. Full-Service Market Research Company. https://www.driveresearch.com/market-research-company-blog/reducing-teacher-turnover-rates/

OECD (2020), TALIS 2018 Results (Volume II): Teachers and School Leaders as Valued Professionals, TALIS, OECD Publishing, Paris, https://doi.org/10.1787/19cf08df-en.

5. Interview structure and conducting. Stages of the study.

As mentioned before, the interview for assessing the needs and strengths of human resources in educational organizations has the following structure: 14 questions, 9 of which are open-ended, and 5 of which are closed-ended (Yes / No questions). Five questions are left at the beginning of the interview to collect demographic data such as age, gender, profession, etc.

Proper interview structure is very important and key for the successful application of the interview and the analysis of the results at a later stage. The interview structure is the prepared format of discussion, used to assess multiple participants. It is pre-planned in order to remove possible bias (Personio Foundation, 2022). Compared to an unstructured or semi-structured interview, a structured interview does not include follow-up questions and discussions.

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There are several reasons as to why a proper interview structure is important. It helps keep the interview on track and focused on the specific topic, while at the same time ensuring an unbiased assessment (in the case of the structured interview by asking the same set of questions).

The structure of the interview also standardizes the order in which questions are asked of respondents, so that they are always within the same context (Personio Foundation, 2022). This is crucial for lessening the influence of context effects, where the answers to a particular question can depend on the previous ones. However, these effects can never be avoided completely, and it is advisable to hold them constant across all participants in order to increase validity.

Although they can be applied in the process of hiring employees, structured interviews can also be used as a qualitative research methodology. Their structure can include the following six question types (Rashidi et al., 2014):

- Demographic questions regarding the background of the participants;
- Knowledge questions;
- Experience questions (in the case of the current interview, these questions predominate);
- Feelings / emotions questions (in the case of the current interview, these questions predominate);
- Opinion questions and questions about goals and values (in the case of the current interview, these questions predominate);
- Sensory questions.

In order to conduct the structured interview in an effective way, the researcher needs to follow the five steps (according to George and Merkus, 2022):

- **Define set appropriate goals and objectives -** this is done via brainstorming the questions connected with the topic of the study. It would help to consider what the objective of the structured interview is and why this method is appropriate.
- **Design the questions –** the interview questions should be easy for participants to understand, simple and concise. Their structure must remain the same. Attention needs to be paid to the questions' order and specific wording.

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Firstly, the research questions of the study must be determined and the broad areas of knowledge that are relevant to answering these questions must be outlined. The questions need to be developed within these areas, in order to fit the particular kinds of participants and their experiences.

Moreover, the language needs to be adjusted according to the respondents (in this case, staff /employees working at educational organizations). The questions must be designed in a way so that participants are encouraged to answer honestly. It should be carefully considered what topics should come first and are a priority. More difficult questions should be left at the end, with the last question providing some sort of closure for the interview.

- **Select the appropriate sampling method** – the sampling method depends on the subject of the study. It can be voluntary response sampling, convenience sampling (using answers from accessible individuals), stratified sampling (based on age, ethnic background, gender or other characteristics), judgment sampling (people already who the researcher knows) and others. For the purposes of the study, convenience sampling is applied.

- **Select the medium** - this is the method used to collect the data, such as paper format, online or in-person through video conferencing or over the phone. The current interview is conducted on paper format and the forms are collected by the researcher. The interview is also available on Google Forms.

- **Conducting the interview** - all environmental conditions must remain constant during the conducting of the interviews. Respondents reply to the questions, providing their opinions, views and experiences. Interviewing can be done individually or in groups, depending on the preference and available time.

At the end, in order to analyze the results from the structured interview the researcher may conduct a content or thematic analysis to search for patterns of replies (this often includes "coding" words or patterns and separating them into categories). Transcribing is not needed for the current study, as the interview is conducted on paper. For this study, the data is collected from participants who are staff / employees from educational organizations.

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Main Stages of the study:

- **Preparation stage:** identifying the needs of the target group (employees/staff from educational organizations); development of the structured interview (developing the structure, the questions, preparation of a paper version and Google Forms version, etc.); selection of participants to take part in the study without taking into account protected characteristics such as gender, sex, sexual orientation, gender identity, religion, ethnicity, origin, race, political beliefs, socioeconomic status, presence of a disability; logistics; preparation for a room/hall for conducting the interview.

- **Conducting stage:** this stage consists of conducting the structured interview with employees/staff from educational organizations (Hristo Botev School in Bulgaria, IMS Private School in Cyprus and WSBINOZ in Poland). Firstly, via a paper version of the interview, and then via Google Forms for better analysis of the results at the next later stage. All environmental conditions must remain constant during the conducting of the interviews with employees/staff. Participants in the study reply to the questions, providing their opinions, views and experiences. Interviewing can be done individually or in groups, depending on the preference and available time.

- **Assessment stage:** The last stage includes the preparation of an Analysis of the results obtained from the structured interview. This report must be prepared by all educational organizations which participate in the study. The document includes relevant data, graphs and/or tables with the results, quantitative and qualitative analysis, as well as important recommendations and conclusions. This Assessment stage serves as a basis for improvement of the final product. The Analysis helps to identify the main challenges and needs of educational organization staff and provide recommendations and measures to improve working conditions and staff support in the educational environment. The recommendations included in the analysis also support the development of the educational organization staff, the improving of working conditions and raising the quality of education, which is essential for the successful functioning of the education system.

Used sources:

Personio Foundation (2022, April 13). Three steps to creating a great interview structure. https://www.personio.com/hr-lexicon/interview-structure/

Rashidi, M.N., Begum, R.A., Mokhtar, M.Z., & Pereira, J.J. (2014). The Conduct of Structured Interviews as Research Implementation Method.

George, T. & Merkus, J. (2022, January 27). Structured Interview | Definition, Guide & Examples. Scribbr. Retrieved July 3, 2023, from https://www.scribbr.com/methodology/structured-interview/

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IV. Study of the needs and strengths of HR in educational organizations

1. Objectives of the study

The main **objectives** of the study are to explore, gather objective information and identify the perceived needs, experiences and challenges of staff /employees working at the institutions (there are 150 participants in total, 50 per organization, which include teachers/ pedagogical staff, administrative staff and other non-pedagogical staff).

Another **objective** of the study is to understand what supports and encourages the employees' personal and professional development. This includes different aspects of their working environment, goals, strengths, skills and competencies, needs and professional development opportunities. The obtained information can serve as a basis for action and decision-making aimed at improving the working conditions and meeting the needs of staff / employees at educational organizations. This would also be beneficial for developing policies and programs for professional development to improve the working environment and provide appropriate support and training. The objectives being change and improvement of educational practices to achieve better results and professional development in the field of education in the abovementioned organizations.

The objectives of the study are also related to the main objective of the project - Capacity building of schools to work transnationally and between sectors, and to the Work package 3 objective: Needs research and learning about the strengths of HR in schools. They are connected to examining the factors, obstacles and potential of staff/ employees working at the three educational institutions in order to support the development of an HR Development plan for each organization (which will support the increase of capacity at organizational and transnational, and personal levels).

In addition to these objectives, the study also aims to assess the qualities, skills, competencies and goals (both personal and professional) of the staff / employees working at the educational organizations, their current needs, working conditions, challenges when working with students / trainees, opportunities for development, and others.

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The study focuses on 50 employees / staff from each of the three educational organizations (150 participants in total). The structured interview is available on paper in English, Bulgarian, Greek and Polish, as well as online on Google Forms. Below are the analyses of the results from each educational organization with the made valuable conclusions and recommendations based on them. After conducting the study and analyzing the results, a Plan for HR development will be developed by each educational organization in Bulgarian, English, Polish, and Greek.

The interview was conducted with fifty respondents in each partner educational organization - IMS Private School in Limassol (Cyprus), "Hristo Botev" Primary School in Varna (Bulgaria) and The Academy of Business and Health Sciences in Lodz (Poland).

Analysis of results, including statistical and qualitative analyses are conducted to identify key observations and trends. Results are presented in numerical and qualitative formats that are suitable for interpretation and discussion. The analysis provides an overall picture of the state of work with education organization staff and offers recommendations for improving working conditions and meeting staff needs.

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2. Results analysis: IMS Private School (Cyprus)

Quantitative analysis:
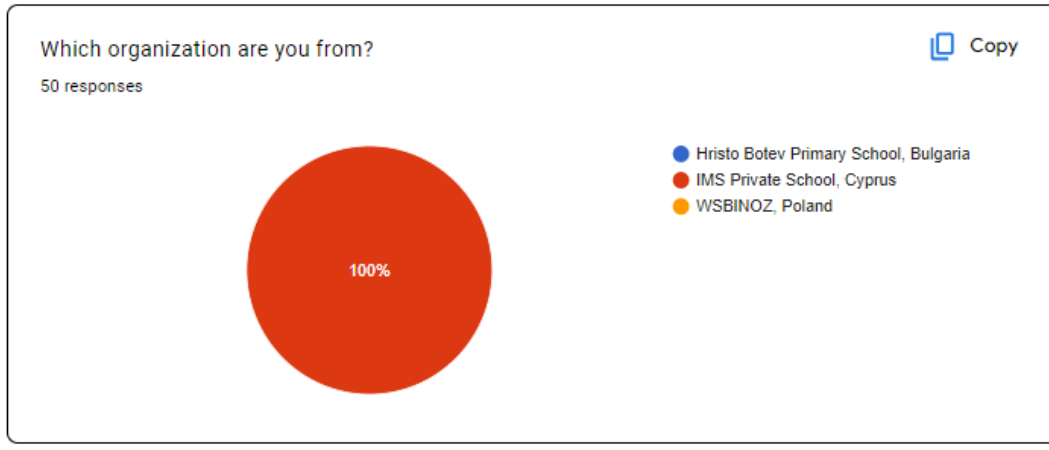
100% of respondents are from IMS Private School in Limassol, Cyprus.
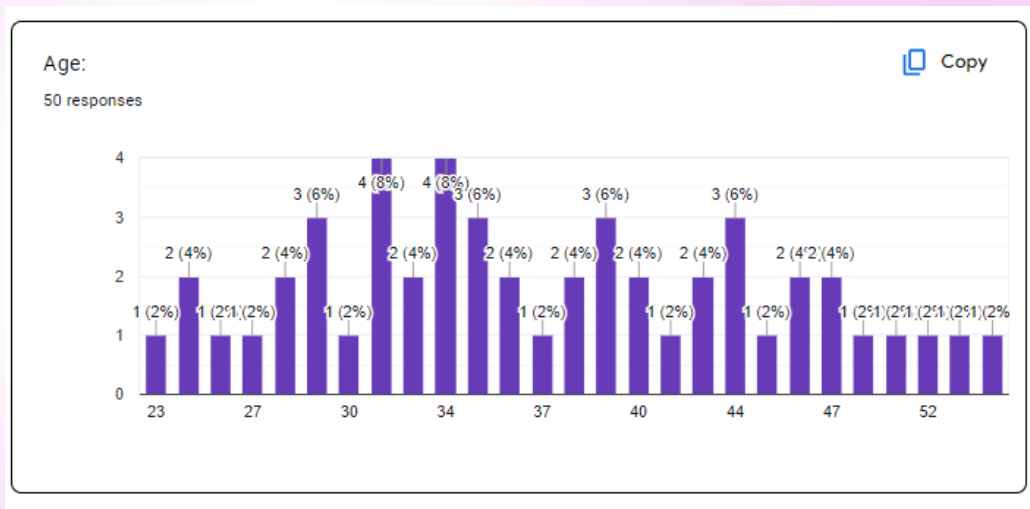
The age range of the respondents ranged from 23 years old to 55 years old. This diversity is significant as it will allow the researchers to extract information from a wider age sample of teachers and staff as it is very important to understand the viewpoint of different generations and schools of thought. In addition, data provided by the structured interview will be very useful in planning programs and activities that meet the different needs and preferences of education workers depending on their age.

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Healthy at school

Gender:

50 responses

Copy

60%

40%

● Male
● Female
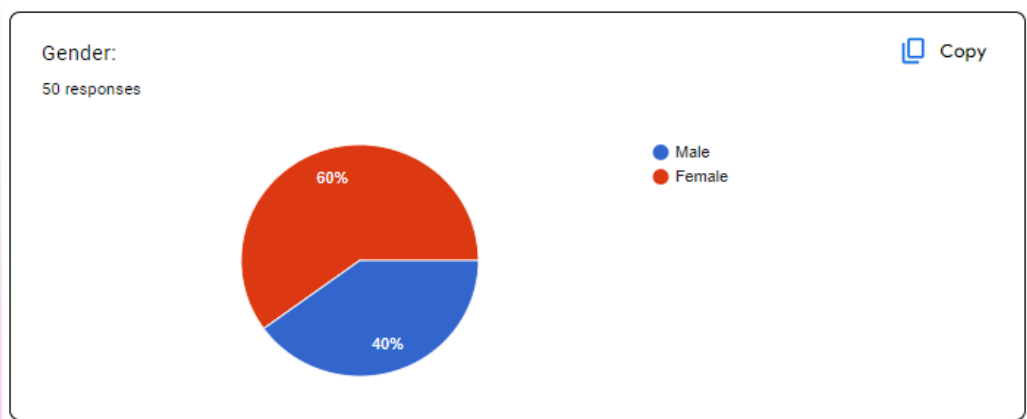
The analysis of the responses to the question on the gender of the participants shows the following:

Men accounted for 40% of participants. This may reflect the presence of men in the education sector, including teachers, administrative staff and other employees.

Women accounted for 60% of participants. This indicates the high representation of women in the educational field, which is typical of many schools and educational institutions.

This analysis shows that women predominate in the education field. This may have important implications for gender equality, representativeness and influencing decision-making and the dynamics of work in the educational environment.

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The analysis of the responses to the question on the occupation of the participants shows the following:

Respondents who were teaching staff accounted for 100% of the participants. This includes teachers, lecturers, pedagogues and other professionals related to education and training. The high representation of teaching staff indicates the importance of their role in the educational environment and working with students.

This analysis highlights the dominant presence of teaching staff in this study, which is to be expected as teachers and other education professionals are key figures in the education process. The presence of other professionals reflects the need for diverse professional roles and teamwork in the educational institution.

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I. Please list at least 3 of your personal qualities: 　　　Copy

50 responses

Moral qualities - charity kindness to people, help for the weak and disadvantaged, respect for oth... — 15 (30%)

Social qualities - sociability, openness, empathy, respect, helpfulness, constructive comm... — 18 (36%)

Business, job-related qualities- collegiality, dependability, attention to detail, organization,... — 17 (34%)

From the data provided, we can draw the following conclusions about the personal qualities shared in response to the question "Please list at least 3 of your personal qualities". The analysis shows that moral qualities made up 30% of the responses, social qualities were present in 36% of the responses, and business-related qualities were mentioned in 34% of the responses.

Moral qualities are of particular importance for the formation of an individual's moral foundation. This may include honesty, fairness and ethical behaviour. The fact that 30% of the responses focused on moral qualities highlights the importance that participants in the education system place on these aspects of personality.

On the other hand, social qualities are also essential for successful interaction and communication with other people. These can include empathy, tolerance and the ability to cooperate. The mention of social qualities in 36% of responses highlights the importance of these skills for students preparing to work and live in modern society.

Similarly, business-related qualities, mentioned in 34% of the responses, are important for a successful career. This may include leadership skills, enterprise, and time management ability. The fact that these qualities are mentioned by a significant proportion of responses indicates the interest of those in the education system in developing the kinds of skills that will prepare them to work successfully in a business environment.

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When analysing the data provided from the question "Please list at least 3 of your professional qualities and skills", we can draw the following conclusions. The answers to this question fall into three categories: individual characteristics, professional skills and communication skills. The percentages of each category show that individual characteristics make up 28% of the responses, professional skills are mentioned in 48% of the responses, and communication skills occur in 24% of the responses.

Individual characteristics, which were shared in 28% of responses, play an important role in professional success. This may include characteristics such as self-discipline, assertiveness and adaptability. The fact that a significant number of responses focused on these individual characteristics highlights the importance of self-management and personal responsibility in achieving professional goals.

Regarding professional skills, which were mentioned in 48% of the responses, they are essential for successful work in a particular profession or field. This can include technical skills, specialist knowledge and expertise in a particular field. The fact that almost half of the responses focus on professional skills highlights the importance of acquiring and developing specific skills related to the field of work.

Communication skills, cited in 24% of responses, play an important role in effective interaction in the professional environment. This can include skills in written and oral communication, listening ability and emotional intelligence. The fact that communication skills were mentioned in a significant number of responses highlights the importance of these skills for successful teamwork and the effective communication of information and ideas.

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In analysing the data provided from the question "What are your personal and professional goals?" we can draw the following conclusions. The answers fall into two categories: personal goals and professional goals. Personal goals related to improvement and development make up 42% of the responses. Professional goals related to working with children are mentioned in 26% of the responses, while professional goals related to growth and competences are mentioned in 32% of the responses.

Personal improvement and development goals, which were mentioned in 42% of responses, highlight the importance of continuous learning and expanding an individual's knowledge and skills. This may include self-education, personal development and achieving personal ambitions. The fact that almost a third of responses focused on these personal goals indicates the participants' drive for personal growth and achieving their potential.

Regarding professional goals, working with children was mentioned in 26% of responses. This highlights the interest of those involved in the education system in professional work that focuses on helping and developing children. This could include professions such as teacher, educator or child development specialist.

Professional goals related to growth and competence were mentioned in 32% of responses. This highlights the participants' desire to continuously develop their professional skills and competencies. They may seek to achieve a higher professional position, improve in a particular field, or acquire new knowledge and skills needed to succeed at work.

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IV. In what direction would you like to develop your potential?

50 responses

From the data provided to the question "In what direction would you like to develop your potential?" we can draw the following conclusions. The answers are divided into four areas: digital and computer technology, languages, creative activities, working with children, professional development, self-improvement and fulfilment in the workplace, and personal potential in individual and group work.

Digital and computer technologies, languages, creative activities were mentioned in 28% of the responses. This highlights participants' interest in developing and improving in technology, languages and creativity. In a technologically progressive world, digital skills and knowledge, including computer technology, are essential for success in a variety of professions. The development of language skills and creative activities also play an important role in personal and professional growth.

Working with children was mentioned in 28% of the responses, reflecting the participants' interest in child-related work. This could include professions such as teacher, educator, social worker and other fields that are focused on supporting and developing children.

Professional development, self-improvement and fulfilment at work were mentioned in 20% of the responses. This highlights the participants' desire to develop their professional skills and competencies, as well as to achieve a successful career and personal fulfilment at work.

Personal potential in individual and group work was mentioned in 24% of responses. This indicates the participants' desire to develop their personal skills and abilities in the areas of communication, collaboration and leadership in both individual and group work.

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V. What do you think are the current needs of school staff?

50 responses

From an analysis of the data provided to the question "What do you think are the current needs of school staff?", we can draw the following conclusions. The answers are divided into four areas: developing language and digital competences, improving facilities, increasing remuneration and improving the microclimate and well-being.

The development of language and digital competences was mentioned in 26% of responses. This indicates the importance of improving the skills and knowledge of educational organization staff in languages and digital technologies. In today's world where technology and communication are essential, developing these competencies can help educational organization staff to be more effective and meet the needs of modern education.

Improving facilities was mentioned in 12% of the responses. This highlights the need to invest in upgrading and improving classrooms, technical equipment and other resources that are necessary for quality education. Improving facilities can create better conditions for staff and students and support the achievement of educational goals.

Pay rises were mentioned in 26% of responses. This indicates the need for recognition and support to educational organization staff through adequate financial remuneration. Increasing remuneration can be an important incentive measure that will improve motivation and retain skilled and dedicated professionals in the education system.

Improving microclimate and wellbeing was mentioned in 38% of responses. This highlights the importance of creating a supportive and enjoyable working environment for staff. This includes improving relationships and communication, providing sufficient support and resources, and ensuring conditions are in place to support the wellbeing and health of educational organization staff.

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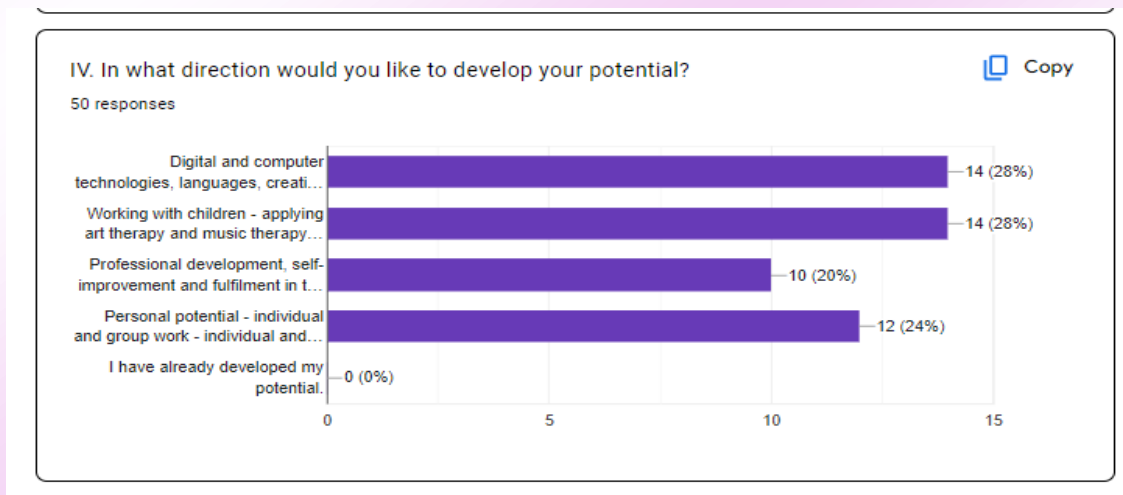
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VI. What are your needs?

50 responses

When analysing the data provided by the question "What are your needs?" we can draw the following conclusions. The answers are divided into three main areas: professional development - training, material conditions (facilities) and equipment, remuneration, support and motivation.

Professional development through training was mentioned in 36% of responses. This indicates the need for continuous improvement and acquisition of new knowledge and skills related to current professional activities. Professional learning can support personal and career growth by providing participants with the tools and resources necessary to successfully perform their duties.

Material conditions (facilities) and equipment were mentioned in 8% of the responses. This highlights the importance of providing adequate material resources that are necessary to carry out tasks and achieve objectives. Improving material conditions and equipment can create a more productive and efficient working environment.

Reward, support and motivation were mentioned in 56% of the responses. This indicates the need for adequate remuneration, management support and motivation to sustain and stimulate participants in every respect. Reward and support can contribute to employee satisfaction and talent retention, while motivation can encourage employees to achieve high performance and have an engaged and successful career.

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VII. What would you change about your working conditions?   Copy

50 responses

Administrative work and organization - the volume of ad...	23 (46%)
Support and training - mentoring is a must, sharing skills and kn...	18 (36%)
Material resources, facilities (base) and equipment - the aes...	4 (8%)
Remuneration, support and motivation - pay and motivation...	6 (12%)
I wouldn't change anything.	0 (0%)

After analysing data from the question "What would you change about your working conditions?", we can draw the following conclusions. The answers are divided into four main areas: administrative work and organisation, support and training, material resources and conditions (facilities) and equipment, remuneration, support and motivation.

Administrative work and organisation were mentioned in 46% of the responses. This indicates the need for improvement in aspects such as the efficiency of administrative processes, the organisation of work tasks and the time taken to complete administrative duties. Improvements in this area can contribute to greater efficiency and productivity at work and free up time to focus on core professional tasks.

Support and training were mentioned in 36% of responses. This highlights the importance of having appropriate support from management and the organisation, and the opportunity for ongoing learning and development. Improving support and training provision can help employees develop and adapt to changing demands in the work environment.

Material resources, conditions (facilities) and equipment were mentioned in 8% of the responses. This indicates the need to improve the infrastructure and provide modern equipment that is necessary to perform work tasks effectively. Improvement in this area can create better working conditions and increase employee productivity.

Reward, support and motivation were mentioned in 12% of the responses. This indicates the need for adequate remuneration, management support and motivational measures to sustain and incentivise employees. Improvement in this area can increase employee satisfaction and

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motivation, which has a positive effect on work productivity and talent retention in the organisation.

When analysing data from the question "What are the main challenges in working with students?" we can draw the following conclusions. The answers can be divided into three main challenges: student behaviour, motivation and desire, working with parents and the individual approach.

Student behaviour was mentioned as a major challenge in 18% of responses. This indicates the complexity involved in dealing with different types of behaviour and managing discipline in the classroom. An appropriate strategy is needed to manage behaviour difficulties and create an appropriate learning environment that supports good behaviour and academic achievement of students.

Student motivation and desire was mentioned as a challenge in 40% of responses. This highlights the importance of stimulating students' interest and motivation to learn and succeed. Improving motivation can include the introduction of varied teaching methods, innovative approaches and real-life connections to ensure greater student engagement and active participation in the learning process.

Working with parents and the individual approach was mentioned as a challenge in 26% of responses. This indicates the need to establish a partnership with parents and interact with them to support the learning process and student development. The individual approach requires teachers to adapt to each child's individual needs and abilities and provide personalised support.

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IX. What opportunities do you see for the development of school staff?   Copy

50 responses

From the answers to the question "What opportunities do you see for school staff development?", we can draw the following conclusions. The responses break down into four main development opportunities: qualifications and training, cross-curricular, multidisciplinary and international opportunities, personal development and career development.

Qualifications and training were cited as the main development opportunity in 30% of responses. This highlights the importance of continuous learning and professional development for educational organization staff. Continuing education, skills development and the acquisition of new qualifications can improve the competence of teachers and staff in educational organizations and enable them to adapt to the changing demands and needs of students and the education system.

Cross-sectoral, multidisciplinary and international development opportunities were mentioned in 18% of responses. This indicates the need for collaboration and interaction between different sectors, disciplines and countries, which can provide new and diverse opportunities to share knowledge and experiences. Participation in international projects, mobility and collaboration with other educational institutions can broaden the horizons of educational staff and introduce them to new educational approaches and practices.

Personal development was mentioned as a development opportunity in 34% of responses. This highlights the need to support and promote the personal growth and well-being of educational organization staff. Developing soft skills, self-improvement, managing stress and supporting work-life balance are important aspects of developing sustainable and successful educational organization staff.

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Career development was selected by 18% of the participants who have set personal goals and aspirations to keep advancing in their field of work and use their ambitions as motivation to become better educators.

Analysis of responses to the question: "Do you think school staff deal effectively with stress in the workplace?"

The results show that 58% of the responses indicate that staff manage stress effectively in the workplace, while 42% feel that they are not effective in managing stress.

This result highlights the importance of attention and care to the well-being and good working environment of staff. Although a significant number of participants rated their effectiveness in dealing with stress positively, there were still a significant number who were not satisfied.

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XI. Do you think there is fluctuation of labor among school staff? 　　Copy

50 responses

● Yes
● No

62%

38%
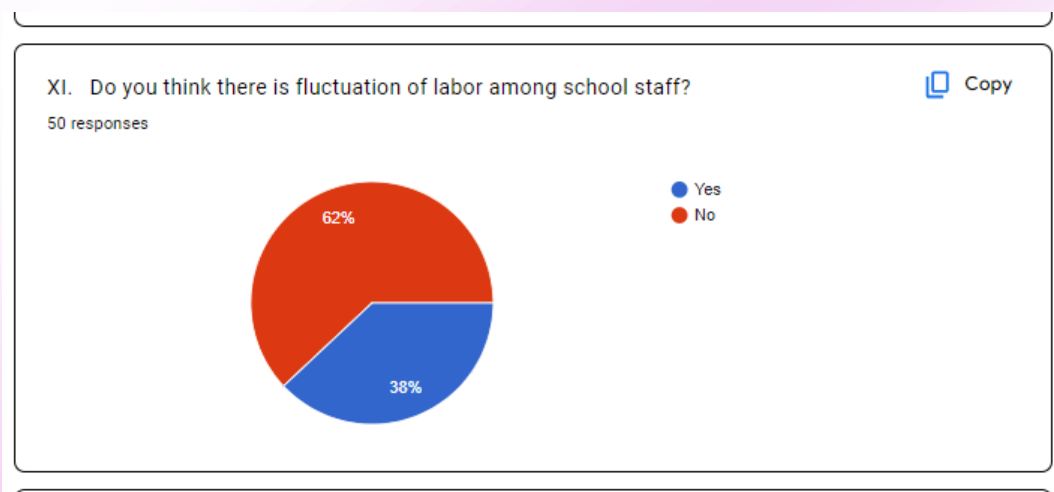
Responses to the question "Do you think there is turnover among school staff?" indicate that 62% of responses indicate that they think there is turnover among educational organization staff, while 38% do not think turnover is a problem.

Turnover among staff is a serious challenge that can have negative effects on the quality of education and the working environment in educational organizations. The percentage of "yes" respondents indicates that turnover is occurring, but it is not widespread and yet work needs to be done to address this issue.

XII. Do you feel stable and secure at work? 　　Copy

50 responses

● Yes
● No

38%

62%
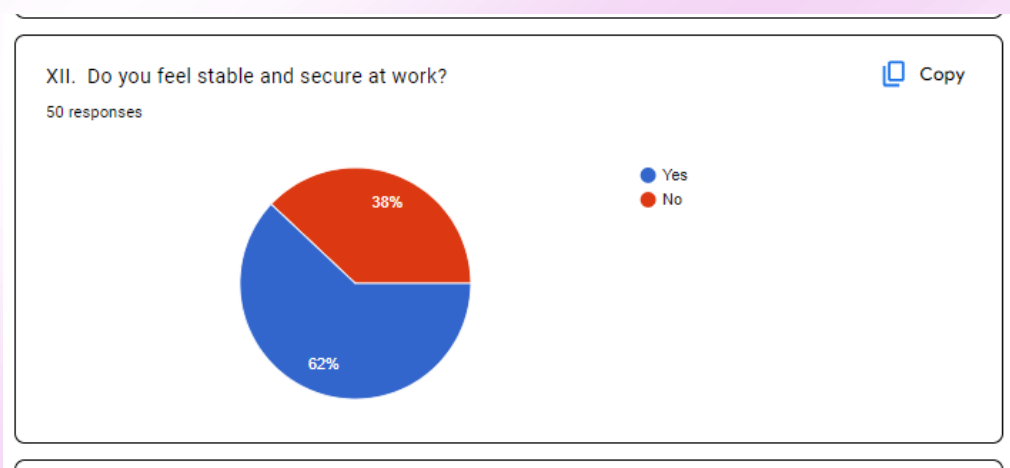
When analysing the responses to the question " Do you feel stable and secure at work?" the following results are presented, 62% of the responses indicate that they feel secure at work, while 38% do not.

This is an encouraging result which indicates that a large proportion of staff feel secure in their jobs. Feeling safe is important to establishing a productive and healthy work environment.

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However, consideration needs to be given to the 38% responses which indicate that some members of educational organization staff do not feel safe. This could be the result of a variety of factors, such as lack of support from management, conflicts in the work environment or lack of clear security procedures and policies.
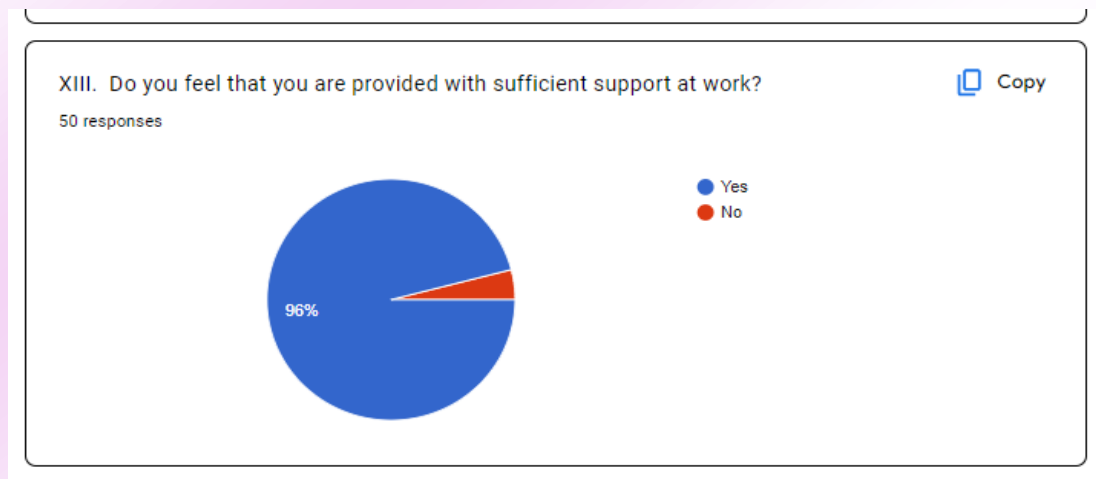
From the responses presented to the question "Do you feel that you are given enough support at work?" it can be concluded that 96% of responses indicate that they feel they are given enough support at work, while 4% of respondents do not feel they are given enough support.

This result shows that a large proportion of staff feel supported and assisted in their work. Support plays an important role in the motivation, confidence and general well-being of educational organization staff.

However, consideration needs to be given to the 4% responses which indicate that some members of staff do not feel that they receive enough support. This may be a result of insufficient communication channels, lack of resources or unclear expectations.

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XIV. Do you think that the current work environment contributes to your personal and professional development?

50 responses

Copy

- Yes
- No

86%

14%
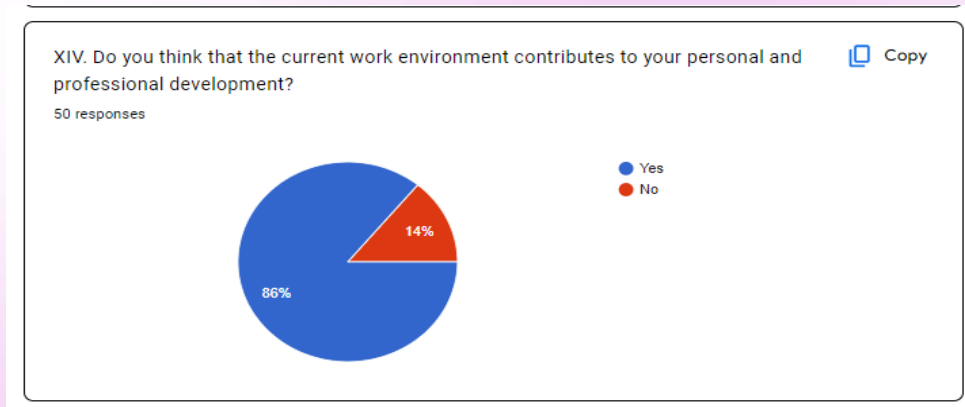
The results of the question "Do you think that the current working environment contributes to your personal and professional development?" show that 86% of respondents think that the current working environment contributes to their personal and professional development, while 10% of respondents do not think that their working environment has such an impact.

This shows that most staff perceive their working environment as supportive and stimulating for their personal and professional growth. The working environment plays a key role in the motivation, satisfaction and development of staff.

However, it is necessary to draw attention to the 14% responses which indicate that some members of staff do not feel that their current working environment is helping them to progress personally and professionally.

Qualitative analysis:

The analysis of staff data in the educational organization reveals their capabilities and challenges, underscoring the importance of understanding and examining this information to enhance both the educational process and working environment. The data emphasizes staff development opportunities, aiming to extract key observations and correlations to understand staff interests and priorities. The percentage ratios are based on respondents' feedback.

Key Findings on Staff Development:

Qualifications and Training:

- Respondents indicated a preference for external qualifications, updated facilities, visual aids, international training, participation in training, internal qualifications, maintaining

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professional competence, continuous training based on needs, and topic-specific courses.

- 42% of responses focused on qualifications and training, showing staff's interest in expanding their professional skills and competencies.

Intersectoral, Multidisciplinary, and International Opportunities:

- Responses highlighted project activities, interdisciplinary links, and exchanges of experiences and best practices with colleagues, including internationally.
- This interest suggests the importance of broadening staff horizons beyond the traditional education system to enhance their experiences.

Personality Development:

- Responses included developing team relationships, internal qualities, more teamwork, task responsibility, personal growth, leadership skills, and new practices.
- 39% of staff expressed a desire for personal development, indicating a need for self-improvement and leadership skill enhancement.

Challenges in Working with Students:

Student Behavior:

- Challenges such as aggressive behavior, understanding individual students, antisocial behavior, low attention stability, passivity, special educational needs, and discipline issues were noted.
- 18% of staff identified student behavior as a primary challenge, encompassing discipline, motivation, conflicts, and other behavioral issues.

Motivation and Desire:

- Issues included maintaining a positive attitude, motivating students in and out of class, low motivation, lack of interest, and overall student engagement.
- Staff found it challenging to stimulate and sustain student interest and motivation.

Work with Parents and Individual Approach:

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- Challenges in communication with parents, understanding and addressing individual student needs, and maintaining parent-teacher-student relationships were highlighted.

- Effective communication and individualized student approaches were significant challenges.

Recommendations for Improvement:

Training and Qualifications:

- Emphasizing systematic and targeted training, focusing on professional skills, language, digital competencies, and cross-curricular and international experiences.

Material Conditions and Equipment:

- Improving classroom environments, resource availability, technological equipment, and other teaching and learning tools.

Reward, Support, and Motivation:

- Enhancing staff remuneration, management support, and motivation incentives to increase engagement and satisfaction.

Developing Microclimate and Well-being:

- Creating a supportive work environment, fostering teamwork and communication, reducing stress, and encouraging creativity.

Analysis of Work Environment Perceptions:

Dealing with Stress:

- 58% felt staff manage stress effectively, while 42% indicated difficulties, suggesting the need for additional support and stress management resources.

Staff Turnover:

- 62% believed turnover was an issue, indicating challenges in staff retention due to factors like motivation, pay, and development opportunities.

- Sense of Job Security:

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- 62% felt secure at work, but 38% saw room for improvement in creating a more secure work environment.

Support Provided in Work:

- 96% felt supported in their work, though 4% desired more support, highlighting the need for continuous improvement in working conditions and communication.

Work Environment and Personal-Professional Development:

- 86% felt their work environment supported personal and professional development, suggesting positive conditions for staff growth and educational achievement.

This comprehensive analysis identifies the main challenges and needs of staff, offering recommendations and measures to enhance working conditions and staff support in the educational environment.

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3. Results analysis: Hristo Botev School (Bulgaria)

Quantitative analysis:

From the data provided, we can draw the following conclusions about the participants in the study:

100% of them currently work at "Hristo Botev" Primary School in Varna, Bulgaria.
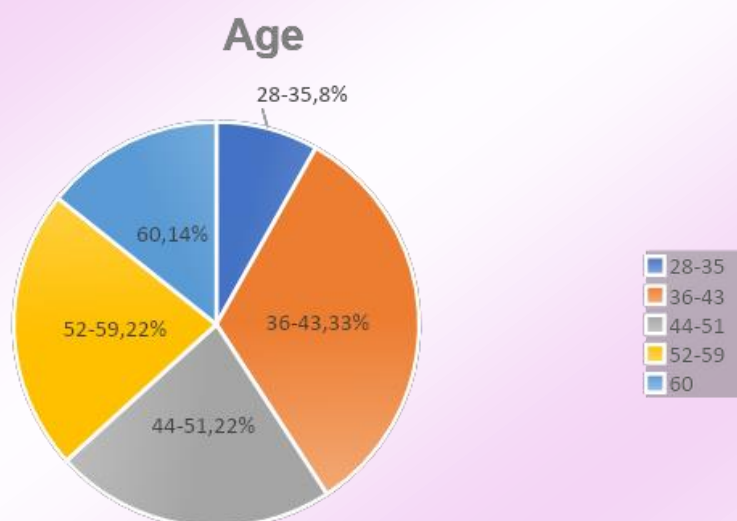
The analysis of the responses to the question on the age of the participants shows the following:

Age group 28-35 years: 33% of the participants are in this group. This may indicate the presence of young professionals or people who are at the beginning of their careers in education.

Age group 36-43: 23% of participants are in this group. This may reflect the experience of more established professionals who are more advanced in their careers and have longer experience in the education field.

Age group 44-51: 22% of participants are in this group. This may indicate that there are a significant number of professionals with mid-career experience and experience in education.

Age group 52-59: 22% of participants are in this group. This may reflect the presence of more experienced and established professionals who are more advanced in age and have longer experience in education.

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Age group 60+: 14% of participants are found in this group. This may indicate the presence of participants who are at or near retirement age but continue to work in education.

This analysis shows the diversity of the age groups of participants and can be useful in planning programs and activities that meet the different needs and preferences of education workers depending on their age.

Gender

Female, 86%
Male, 14%

Female
Male
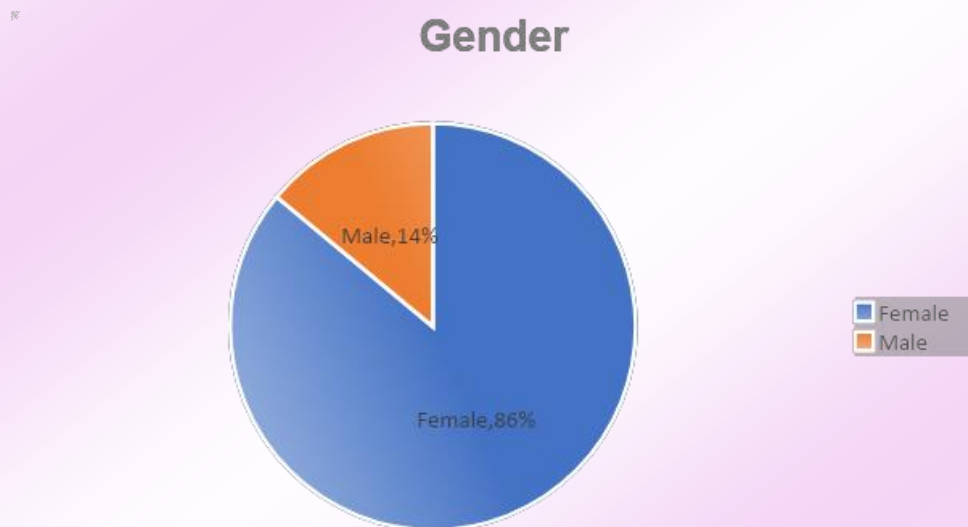
The analysis of the responses to the question on the gender of the participants shows the following:

Men accounted for 14% of participants. This may reflect the presence of men in the education sector, including teachers, administrative staff and other employees.

Women accounted for 86% of participants. This indicates the high representation of women in the educational field, which is typical of many schools and educational institutions.

This analysis shows that women predominate in the education field. This may have important implications for gender equality, representativeness and influencing decision-making and the dynamics of work in the educational organization environment.

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Profession

The analysis of the responses to the question on the occupation of the participants shows the following:

Respondents who were teaching staff in the educational organization accounted for 86% of the participants. This includes teachers, lecturers, pedagogues and other professionals related to education and training. The high representation of teaching staff indicates the importance of their role in the educational environment and working with students.

Respondents from other professions in the educational organization accounted for 14% of the respondents. These are professionals who are not directly involved in teaching. This includes administrative staff, technicians, consultants and other professionals who support the functioning of the educational organization.

This analysis highlights the dominant presence of teaching staff in this study, which is to be expected as teachers and other education professionals are key figures in the education process. The presence of other professionals reflects the need for diverse professional roles and teamwork in the educational institution.

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Please list at least 3 of your personal qualities

- Moral qualities
- Social qualities
- Business, job-related
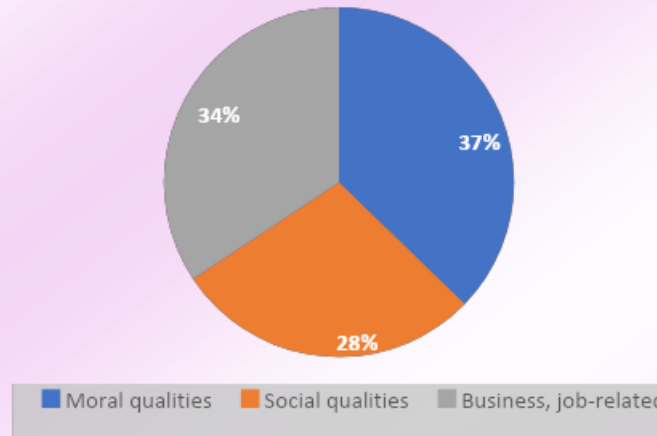
From the data provided, we can draw the following conclusions about the personal qualities shared in response to the question "Please list at least 3 of your personal qualities". The analysis shows that moral qualities made up 37% of the responses, social qualities were present in 29% of the responses, and business-related qualities were mentioned in 34% of the responses.

Moral qualities, which occur in most responses, are of particular importance for the formation of an individual's moral foundation. This may include honesty, fairness and ethical behaviour. The fact that 37% of the responses focused on moral qualities highlights the importance that participants in the education system place on these aspects of personality.

On the other hand, social qualities are also essential for successful interaction and communication with other people. These can include empathy, tolerance and the ability to cooperate. The mention of social qualities in 29% of responses highlights the importance of these skills for students preparing to work and live in modern society.

Similarly, business-related qualities, mentioned in 34% of the responses, are important for a successful career. This may include leadership skills, enterprise, and time management ability. The fact that these qualities are mentioned by a significant proportion of responses indicates the interest of those in the education system in developing the kinds of skills that will prepare them to work successfully in a business environment.

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Please list at least 3 of your professional qualities and skills

When analysing the data provided from the question "Please list at least 3 of your professional qualities and skills", we can draw the following conclusions. The answers to this question fall into three categories: individual characteristics, professional skills and communication skills. The percentages of each category show that individual characteristics make up 25% of the responses, professional skills are mentioned in 39% of the responses, and communication skills occur in 36% of the responses.

Individual characteristics, which were shared in 25% of responses, play an important role in professional success. This may include characteristics such as self-discipline, assertiveness and adaptability. The fact that a significant number of responses focused on these individual characteristics highlights the importance of self-management and personal responsibility in achieving professional goals.

Regarding professional skills, which were mentioned in 39% of the responses, they are essential for successful work in a particular profession or field. This can include technical skills, specialist knowledge and expertise in a particular field. The fact that almost half of the responses focus on professional skills highlights the importance of acquiring and developing specific skills related to the field of work.

Communication skills, cited in 36% of responses, play an important role in effective interaction in the professional environment. This can include skills in written and oral communication, listening ability and emotional intelligence. The fact that communication skills were mentioned in a significant number of responses highlights the importance of these skills for successful teamwork and the effective communication of information and ideas.

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What are your personal and professional goals

In analysing the data provided from the question "What are your personal and professional goals?", we can draw the following conclusions. The answers fall into two categories: personal goals and professional goals. Personal goals related to improvement and development make up 29% of the responses. Professional goals related to working with children are mentioned in 34% of the responses, while professional goals related to growth and competence are mentioned in 37% of the responses.

Personal improvement and development goals, which were mentioned in 29% of responses, highlight the importance of continuous learning and expanding an individual's knowledge and skills. This may include self-education, personal development and achieving personal ambitions. The fact that almost a third of responses focused on these personal goals indicates the participants' drive for personal growth and achieving their potential.

Regarding professional goals, working with children was mentioned in 34% of responses. This highlights the interest of those involved in the education system in professional work that focuses on helping and developing children. This could include professions such as teacher, educator or child development specialist.

Professional goals related to growth and competence were mentioned in 37% of responses. This highlights the participants' desire to continuously develop their professional skills and competencies. They may seek to achieve a higher professional position, improve in a particular field, or acquire new knowledge and skills needed to succeed at work.

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In what direction would you like to develop your potential

- Digital and computer technologies, languages, creative activities
- Working with children
- Professional development, self-improvement and fulfilment in the workplace
- Personal potential - individual and group work

From the data provided to the question "In what direction would you like to develop your potential?", we can draw the following conclusions. The answers are divided into four areas: digital and computer technology, languages, creative activities, working with children, professional development, self-improvement and fulfillment in the workplace, and personal potential in individual and group work.

Digital and computer technologies, languages, creative activities were mentioned in 37% of the responses. This highlights participants' interest in developing and improving in technology, languages and creativity. In a technologically progressive world, digital skills and knowledge, including computer technology, are essential for success in a variety of professions. The development of language skills and creative activities also play an important role in personal and professional growth.

Working with children was mentioned in 20% of the responses, reflecting the participants' interest in child-related work. This could include professions such as teacher, educator, social worker and other fields that are focused on supporting and developing children.

Professional development, self-improvement and fulfillment at work were mentioned in 30% of the responses. This highlights the participants' desire to develop their professional skills and competencies, as well as to achieve a successful career and personal fulfillment at work.

Personal potential in individual and group work was mentioned in 13% of responses. This indicates the participants' desire to develop their personal skills and abilities in the areas of communication, collaboration and leadership in both individual and group work.

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What do you think are the current needs of the school staff
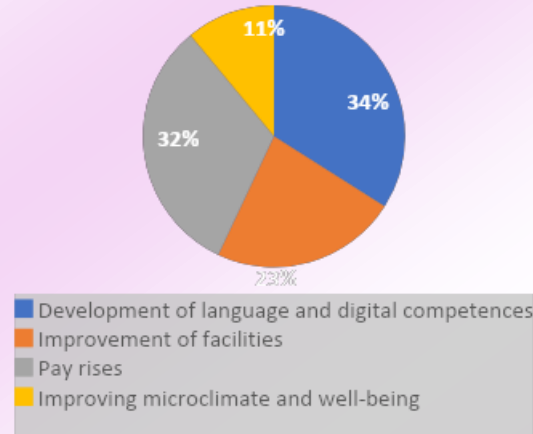
From an analysis of the data provided to the question "What do you think are the current needs of school staff?", we can draw the following conclusions. The answers are divided into four areas: developing language and digital competences, improving facilities, increasing remuneration and improving the microclimate and well-being.

The development of language and digital competences was mentioned in 34% of responses. This indicates the importance of improving the skills and knowledge of educational organization staff in languages and digital technologies. In today's world where technology and communication are essential, developing these competencies can help staff in educational organizations to be more effective and meet the needs of modern education.

Improving facilities was mentioned in 23% of the responses. This highlights the need to invest in upgrading and improving classrooms, technical equipment and other resources that are necessary for quality education. Improving facilities can create better conditions for staff in the educational organization and students and support the achievement of educational goals.

Pay rises were mentioned in 32% of responses. This indicates the need for recognition and support to staff in the educational organization through adequate financial remuneration. Increasing remuneration can be an important incentive measure that will improve motivation and retain skilled and dedicated professionals in the education system.

Improving microclimate and wellbeing was mentioned in 11% of responses. This highlights the importance of creating a supportive and enjoyable working environment for staff in the educational organization. This includes improving relationships and communication, providing

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sufficient support and resources, and ensuring conditions are in place to support the wellbeing and health of staff in the educational organization.

What are your needs
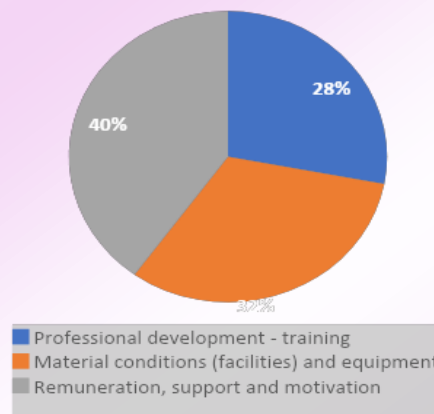
- Professional development - training
- Material conditions (facilities) and equipment
- Remuneration, support and motivation

When analysing the data provided by the question "What are your needs?", we can draw the following conclusions. The answers are divided into three main areas: professional development - training, material conditions (facilities) and equipment, remuneration, support and motivation.

Professional development through training was mentioned in 28% of responses. This indicates the need for continuous improvement and acquisition of new knowledge and skills related to current professional activities. Professional learning can support personal and career growth by providing participants with the tools and resources necessary to successfully perform their duties.

Material conditions (facilities) and equipment were mentioned in 32% of the responses. This highlights the importance of providing adequate material resources that are necessary to carry out tasks and achieve objectives. Improving material conditions and equipment can create a more productive and efficient working environment.

Reward, support and motivation were mentioned in 40% of the responses. This indicates the need for adequate remuneration, management support and motivation to sustain and stimulate participants in every respect. Reward and support can contribute to employee satisfaction and talent retention, while motivation can encourage employees to achieve high performance and have an engaged and successful career.

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What would you change in your working conditions
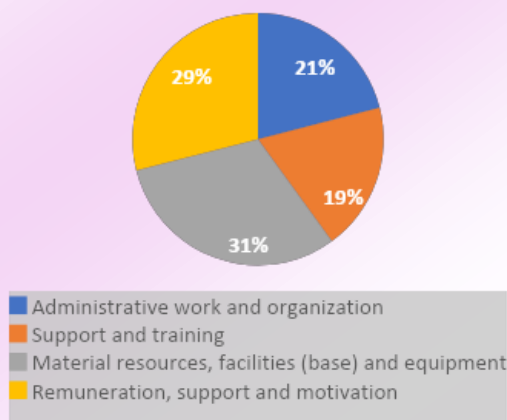
After analysing data from the question "What would you change about your working conditions?", we can draw the following conclusions. The answers are divided into four main areas: administrative work and organization, support and training, material resources and conditions (facilities) and equipment, remuneration, support and motivation.

Administrative work and organization were mentioned in 21% of the responses. This indicates the need for improvement in aspects such as the efficiency of administrative processes, the organization of work tasks and the time taken to complete administrative duties. Improvements in this area can contribute to greater efficiency and productivity at work and free up time to focus on core professional tasks.

Support and training were mentioned in 19% of responses. This highlights the importance of having appropriate support from management and the organization, and the opportunity for ongoing learning and development. Improving support and training provision can help employees develop and adapt to changing demands in the work environment.

Material resources, conditions (facilities) and equipment were mentioned in 31% of the responses. This indicates the need to improve the infrastructure and provide modern equipment that is necessary to perform work tasks effectively. Improvement in this area can create better working conditions and increase employee productivity.

Reward, support and motivation were mentioned in 29% of the responses. This indicates the need for adequate remuneration, management support and motivational measures to sustain and incentivise employees. Improvement in this area can increase employee satisfaction and

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motivation, which has a positive effect on work productivity and talent retention in the organization.

What are the main challenges in working with students

When analysing data from the question "What are the main challenges in working with students?", we can draw the following conclusions. The answers can be divided into three main challenges: student behaviour, motivation and desire, working with parents and the individual approach.

Student behaviour was mentioned as a major challenge in 40% of responses. This indicates the complexity involved in dealing with different types of behaviour and managing discipline in the classroom. An appropriate strategy is needed to manage behaviour difficulties and create an appropriate learning environment that supports good behaviour and academic achievement of students.

Student motivation and desire was mentioned as a challenge in 32% of responses. This highlights the importance of stimulating students' interest and motivation to learn and succeed. Improving motivation can include the introduction of varied teaching methods, innovative approaches and real-life connections to ensure greater student engagement and active participation in the learning process.

Working with parents and the individual approach was mentioned as a challenge in 28% of responses. This indicates the need to establish a partnership with parents and interact with them to support the learning process and student development. The individual approach requires teachers to adapt to each child's individual needs and abilities and provide personalized support.

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What opportunities do you see for school staff development

- Qualifications and training Horizontal development
- Intersectoral, multidisciplinary, international Horizontal development
- Developing personality Horizontal development

From the answers to the question "What opportunities do you see for school staff development?", we can draw the following conclusions. The responses break down into three main development opportunities: qualifications and training, cross-curricular, multidisciplinary and international opportunities, and personal development.

Qualifications and training were cited as the main development opportunity in 42% of responses. This highlights the importance of continuous learning and professional development for staff in the educational organization. Continuing education, skills development and the acquisition of new qualifications can improve the competence of teachers and staff in educational organizations and enable them to adapt to the changing demands and needs of students and the education system.

Cross-sectoral, multidisciplinary and international development opportunities were mentioned in 19% of responses. This indicates the need for collaboration and interaction between different sectors, disciplines and countries, which can provide new and diverse opportunities to share knowledge and experiences. Participation in international projects, mobility and collaboration with other educational institutions can broaden the horizons of staff and introduce them to new educational approaches and practices.

Personal development was mentioned as a development opportunity in 39% of responses. This highlights the need to support and promote the personal growth and well-being of staff in the educational organization. Developing soft skills, self-improvement, managing stress and supporting work-life balance are important aspects of developing sustainable and successful staff.

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Do you believe that school staff deal effectively with workplace stress
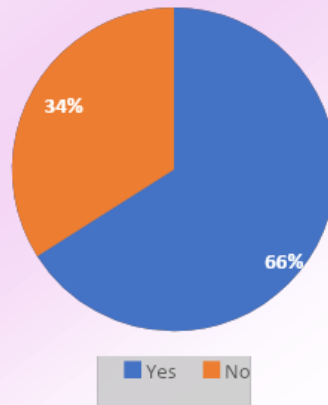
Analysis of responses to the question "Do you think school staff deal effectively with stress in the workplace?"

The results show that 66% of the responses indicate that staff in the educational organization manage stress effectively in the workplace, while 34% feel that they are not effective in managing stress.

This result highlights the importance of attention and care to the well-being and good working environment of staff in educational organizations. Although a significant number of participants rated their effectiveness in dealing with stress positively, there were still a significant number who were not satisfied.

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Do you think there is fluctuation of labour among school staff
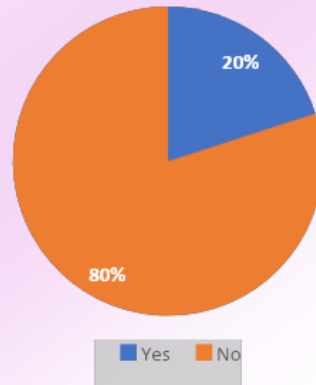
Responses to the question "Do you think there is turnover among school staff?" indicate that 80% of responses indicate that they think there is turnover among staff in the educational organization, while only 10% do not think turnover is a problem.

Turnover among staff is a serious challenge that can have negative effects on the quality of education and the working environment in educational organizations. The percentage of "yes" respondents indicates that turnover is occurring, but it is not widespread and yet work needs to be done to address this issue.

Do you feel stable and secure at work

When analysing the responses to the question " Do you feel stable and secure at work?" the following results are presented, 86% of the responses indicate that they feel secure at work, while 14% do not.

This is an encouraging result which indicates that a large proportion of staff feel secure in their jobs. Feeling safe is important to establishing a productive and healthy work environment.

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However, consideration needs to be given to the 14% responses which indicate that some members of staff do not feel safe. This could be the result of a variety of factors, such as lack of support from management, conflicts in the work environment or lack of clear security procedures and policies.

Do you feel that you are sufficiently supported in your work
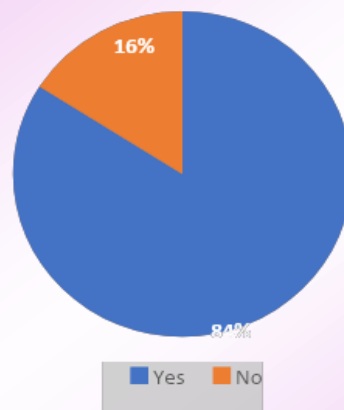
16%
84%
Yes No

From the responses presented to the question "Do you feel that you are given enough support at work?" it can be concluded that 84% of responses indicate that they feel they are given enough support at work, while 16% of respondents do not feel they are given enough support. This result shows that a large proportion of staff feel supported and assisted in their work. Support plays an important role in the motivation, confidence and general well-being of staff in educational organizations.

However, consideration needs to be given to the 16% responses which indicate that some members of staff do not feel that they receive enough support. This may be a result of insufficient communication channels, lack of resources or unclear expectations.

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Do you think that your current working environment contributes to your personal and professional development
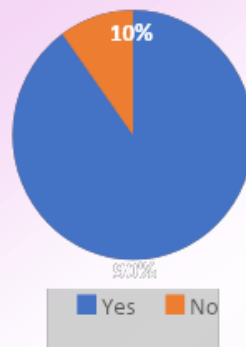
The results of the question "Do you think that the current working environment contributes to your personal and professional development?" show that 90% of respondents think that the current working environment contributes to their personal and professional development, while 10% of respondents do not think that their working environment has such an impact.

This shows that most staff perceive their working environment as supportive and stimulating for their personal and professional growth. The working environment plays a key role in the motivation, satisfaction and development of staff in the educational organization.

However, it is necessary to draw attention to the 10% responses which indicate that some members of staff do not feel that their current working environment is helping them to progress personally and professionally.

Qualitative analysis:

The analysis of the data presented on staff and their capabilities and challenges highlights the importance of understanding and analysing this data to improve the educational process and working environment in educational organizations. The data was presented on staff development opportunities. The main objective is to derive key observations and correlation of said opportunities. This will help us understand where the interest of education organization staff is focused and which areas are of particular importance to them. It is important to note that the percentage ratio is based on the responses provided by respondents.

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1. Qualifications and training. In the interviews, respondents gave the following answers - external qualifications, updating facilities and visual aids, international training, opportunity to participate in training, internal qualifications, maintaining professional competence, continuous training according to needs, courses on selected topics, internal qualifications. The data presented shows that 42% of the responses relate to opportunities for qualifications and training. This indicates that staff in the educational organization are interested and willing to expand their professional skills and competencies through training and specialized programs.

2. Intersectoral, multidisciplinary and international opportunities. In the interviews, respondents gave the following answers -implementation of project activities, realization of interdisciplinary links, exchange of experience and good practices with colleagues including international. The responses reflected an interest in cross-cutting, multidisciplinary and international opportunities. This highlights the importance of broadening the horizons of staff in the educational organization beyond the traditional confines of the education system to complement and enrich their experiences.

3. Personality development. In the interviews, respondents gave the following answers - developing team relationships and internal qualities, developing team relationships, more teamwork, responsibility in completing tasks, building personality and individual qualities, initiative and resourcefulness, putting more effort, let's be more understanding of each other, new skills, practices. Responses indicate that 39% of staff express a desire for personal development. This includes aspects such as self-improvement, personal growth and developing leadership skills.

Data analysis on challenges in working with students identified some key aspects that create challenges for staff in the educational organization in interacting with students. These can be summarised in the following areas:

1. Student behaviour. In the interviews conducted, the respondents gave the following answers - aggressive behaviour, work to understand the child and his individuality, antisocial behaviour, low attention stability, passivity, children with SEN, challenges at work, mental and physical development support reaction of others acceptance integration reintegration discrimination, discipline. Responses reflected that 40% of staff identified student behaviours as one of the

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main challenges. This may include discipline issues, lack of motivation, student conflict and other behavioural challenges.

2. Motivation and desire. In the interviews, the respondents gave the following answers - motivation and desire to work, maintaining a positive attitude of students, motivating students to work in and out of class, low motivation to work, lack of desire to work, lack of interest and motivation on the part of students. The responses reflect that students' motivation and willingness are challenging for staff in the educational organization. This may include difficulties in stimulating and sustaining student interest in learning, as well as challenges in motivating different groups of students.

3. Work with parents and individual approach. In the interviews, respondents gave the following answers - dynamic working environment, individual approach, parent-teacher-student mediator, negative evaluation of parents influencing students, relationship with students and their parents, relationship with parents. Responses reflect that working with parents and the individual approach to students is challenging. This may include communication challenges with parents, the need to understand and respond to individual student needs and differences.

From an analysis of the data presented on the needs, challenges and opportunities of staff in the educational organization, we can indicate the average recommendations for improving working conditions. These recommendations are intended to support the professional development, well-being and effectiveness of staff in the educational organization:

1. Training and qualifications. In the interviews, respondents gave the following answers - external qualifications, updating facilities and visual aids, international training, opportunity to participate in training, internal qualifications, maintaining professional competence, continuous training according to needs, courses on selected topics, internal qualifications. In view of the high percentage of responses relating to the need for training and qualifications, we recommend that educational organizations invest in systematic and targeted training for their staff. These trainings can be focused on the development of specific professional skills, language and digital competences, as well as the development of cross-curricular and international experiences.

2. Material conditions and equipment. In the interviews, the respondents gave the following answers - the aesthetic environment of the classroom, I would organize a classroom system, the classroom where I work, hygiene, time management and efficient allocation of resources, I

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would like to have my own place to store my belongings (learning materials), and time for meals (lunch), a room where we gather, different materials to work with students. The next recommendation is to pay attention to improving the facilities and equipment in educational organizations. This includes providing sufficient resources, books, technological equipment and other tools that support quality teaching and learning processes.

3. Reward, support and motivation. In the interviews, respondents gave the following answers - pay and motivation, a system to motivate through bonuses, higher pay so that I don't have to worry about tomorrow. We recommend that educational organizations pay attention to the remuneration, support and motivation of staff. Adequate remuneration, management support and motivation incentives can increase staff engagement and satisfaction, ultimately leading to improved educational process and better outcomes.

4. Developing microclimate and well-being. In the interviews, respondents gave the following answers - physical and mental well-being, working in a more relaxed environment, no stressful situations, reducing workplace stress and coping strategies, easing administrative work, stimulating creativity, teamwork and communication, more staff activity, more transparency and honesty in relationships between colleagues, better teamwork for shared success rather than individual success, team building, teamwork. The last recommendation is to focus on improving the microclimate and well-being in educational organizations. This includes creating a supportive and enjoyable work environment, appropriate interpersonal relationships, collaboration and communication, and developing strategies to deal with stress and conflict.

The analysis of the results of questions about perceptions and opinions of staff in the educational organization about a supportive and stable work environment:

1. Dealing with stress at work. The results showed that (66%) of the participants felt that staff deal effectively with stress at work. This indicates the presence of stressors in the educational organization environment, but also relevant coping skills and strategies. On the other hand, (34%) responded that staff may have difficulty coping with stress, highlighting the need for support and resources to manage stress.

2. Staff turnover. The results indicate (80%) of the participants believe that there is turnover among staff in the educational organization. This high percentage indicates the problem of staff retention and the negative effect on the stability and continuity of the educational process.

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Turnover can be attributed to several factors such as insufficient motivation, low remuneration, lack of development, etc.

3. Sense of job security. Most participants (86%) expressed that they felt secure at work. They indicate the existence of conditions that condition the feeling of safety and stability of the staff. However, there are (14%) responses that indicate there is still a need for improvements in creating a more secure work environment.

4. Support provided in the work. The majority (84%) of participants felt that they were given sufficient support in their work. This indicates the availability of appropriate mechanisms and resources to assist staff in their professional development and performance of their duties. However, (16%) respondents expressed a need for additional support, highlighting the importance of continuously improving working conditions and communication with staff.

5. Work environment and personal-professional development. Most participants (90%) felt that their current work environment contributed to their personal and professional development. This indicates the presence of conditions and opportunities that foster staff growth and success. This result is important as it provides a basis for supporting and continuing a positive work environment that impacts staff development and educational achievement.

Analyses help to identify the main challenges and needs of staff in educational organizations and provide recommendations and measures to improve working conditions and staff support in the educational environment.

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4.   Results analysis: WSBINOZ (Poland)

Quantitative analysis:

From the data provided, we can draw the following conclusions about the participants in the study:

100% of respondents are from The Academy of Business and Health Sciences in Lodz, Poland.

Which organization are you from?
50 responses

🔵 Hristo Botev Primary School, Bulgaria
🔴 IMS Private School, Cyprus
🟠 WSBINOZ, Poland

100%

Age:
50 responses

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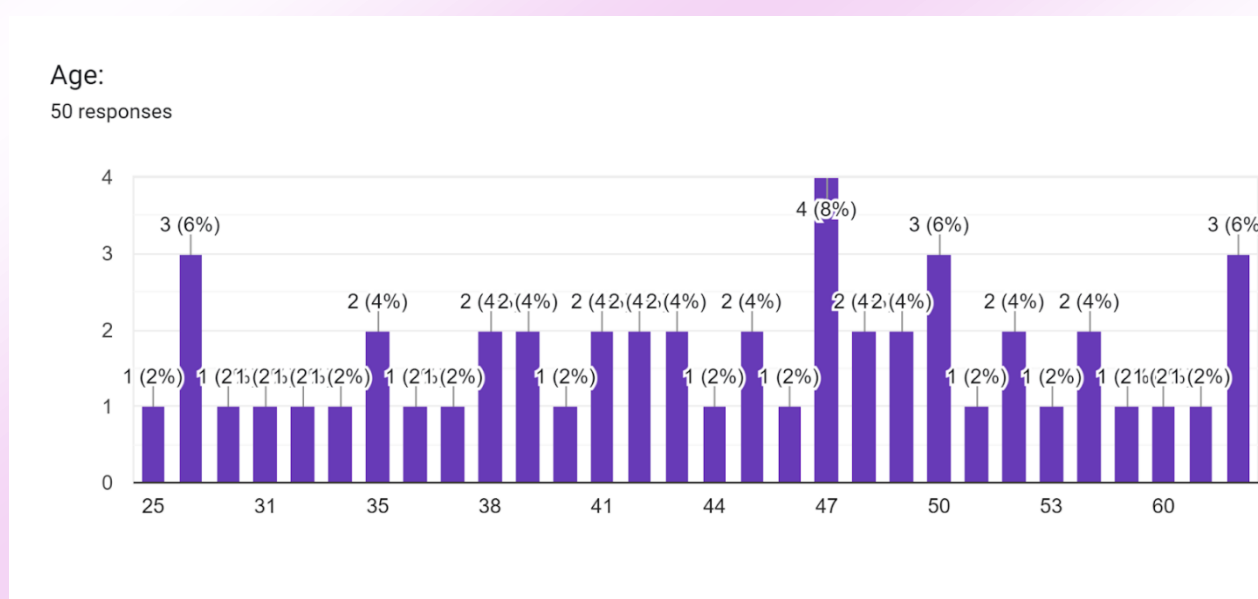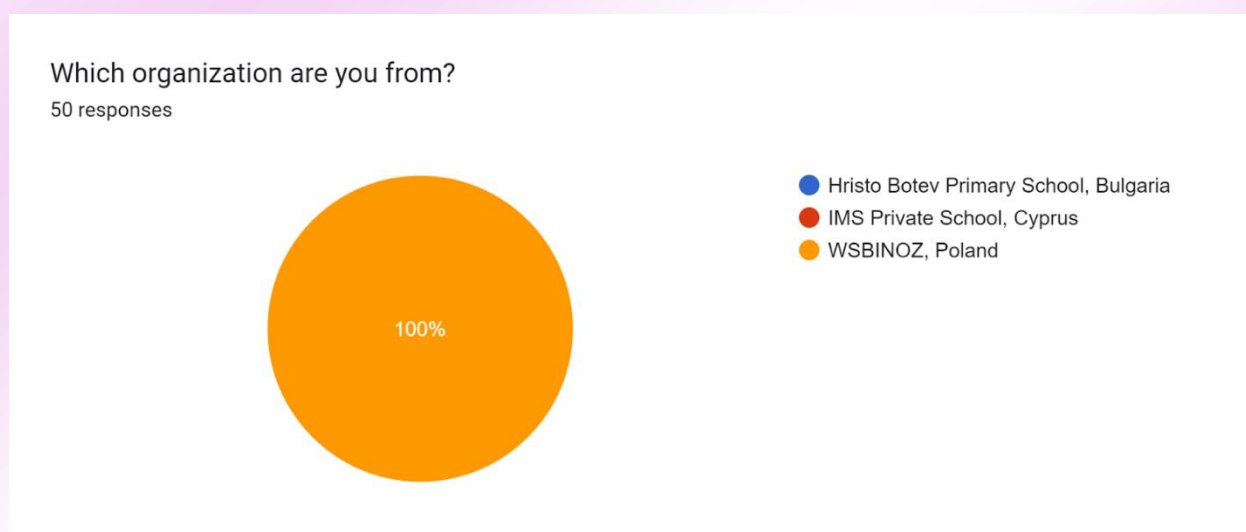
The age range of the respondents ranged from 25 years old to 62 years old. This diversity is significant as it will allow the researchers to extract information from a wider age sample of teachers and staff as it is very important to understand the viewpoint of different generations and universities of thought. In addition, data provided by the structured interview will be very useful in planning programs and activities that meet the different needs and preferences of education workers depending on their age.

Gender:
50 responses
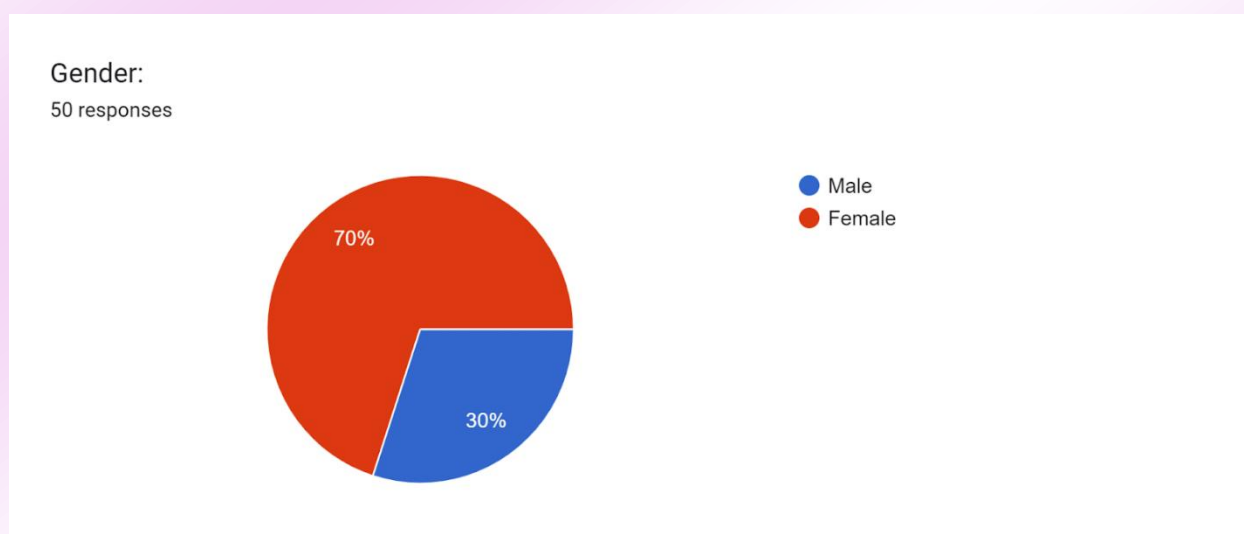
The analysis of the responses to the question on the gender of the participants shows the following:

Men accounted for 30% of participants. This may reflect the presence of men in the education sector, including teachers, administrative staff and other employees.

Women accounted for 70% of participants. This indicates the high representation of women in the educational field, which is typical of many universities and educational institutions.

This analysis shows that women predominate in the education field. This may have important implications for gender equality, representativeness and influencing decision-making and the dynamics of work in the academic environment.
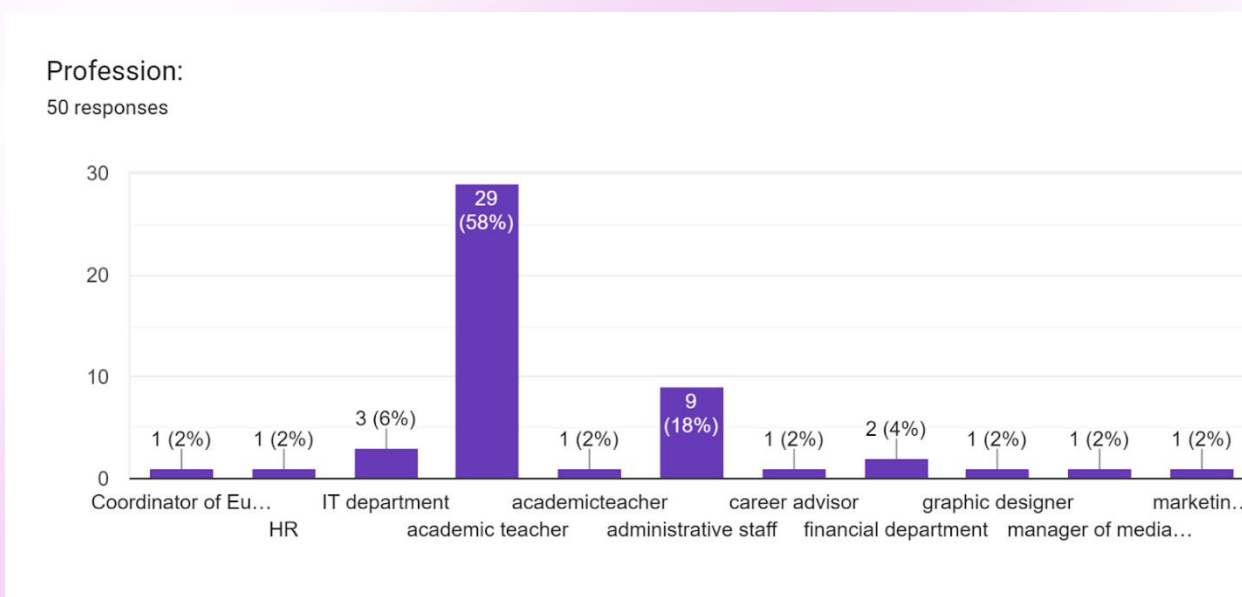
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Profession:

50 responses

The analysis of the responses to the question on the occupation of the participants shows the following:

Respondents who were staff at the university accounted for academic teachers (60 %), administration (18 %), IT department (6 %), financial department (4 %) and other staff 12 %. This includes academic teachers, lecturers, pedagogues, IT specialists and other staff working at the university. The high representation of teaching staff indicates the importance of their role in the educational environment and working with students.

This analysis highlights the dominant presence of teaching staff in this study, which is to be expected as academic teachers and other education professionals are key figures in the education process. The presence of other professionals reflects the need for diverse professional roles and teamwork in the educational institution.

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I. Please list at least 3 of your personal qualities:

50 responses
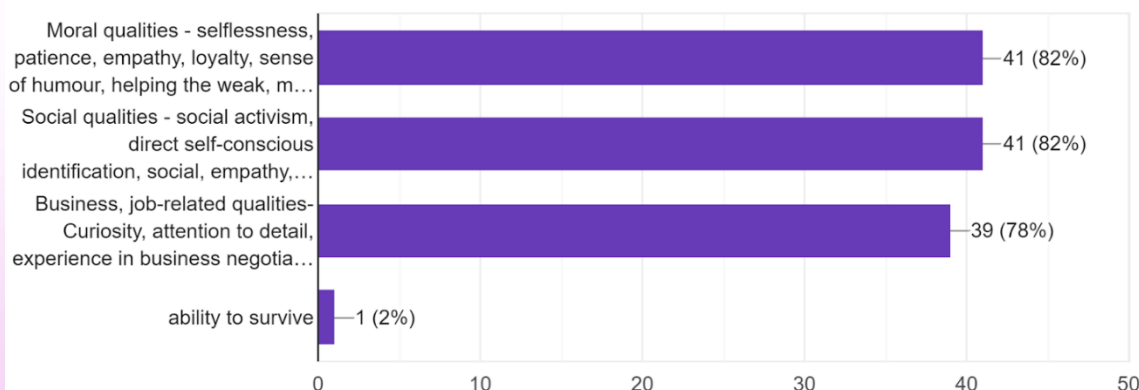
From the data provided, we can draw the following conclusions about the personal qualities shared in response to the question "Please list at least 3 of your personal qualities". The analysis shows that moral qualities made up 82% of the responses, social qualities were present in 82% of the responses, and business-related qualities were mentioned in 78% of the responses.

Moral qualities are of particular importance for the formation of an individual's moral foundation. This may include honesty, fairness and ethical behaviour. The fact that 82% of the responses focused on moral qualities highlights the importance that participants in the education system place on these aspects of personality.

On the other hand, social qualities are also essential for successful interaction and communication with other people. These can include empathy, tolerance and the ability to cooperate. The mention of social qualities in 82% of responses highlights the importance of these skills for teachers preparing to work and live in modern society.

Similarly, business-related qualities, mentioned in 78% of the responses, are important for a successful career. This may include leadership skills, enterprise, and time management ability. The fact that these qualities are mentioned by a significant proportion of responses indicates the interest of those in the education system in developing the kinds of skills that will prepare them to work successfully in a business environment.

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II. Please list at least 3 of your professional qualities and skills:

50 responses
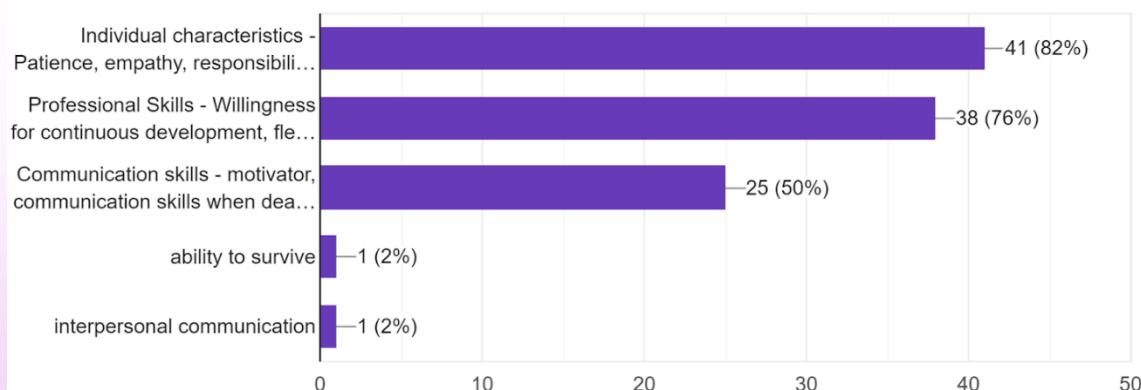
When analysing the data provided from the question "Please list at least 3 of your professional qualities and skills", we can draw the following conclusions. The answers to this question fall into three categories: individual characteristics, professional skills and communication skills. The percentages of each category show that individual characteristics make up 82% of the responses, professional skills are mentioned in 76% of the responses, and communication skills occur in 50% of the responses.

Individual characteristics, which were shared in 82% of responses, play an important role in professional success. This may include characteristics such as self-discipline, assertiveness and adaptability. The fact that a significant number of responses focused on these individual characteristics highlights the importance of self-management and personal responsibility in achieving professional goals.

Regarding professional skills, which were mentioned in 76% of the responses, they are essential for successful work in a particular profession or field. This can include technical skills, specialist knowledge, and expertise in a particular field. The fact that almost half of the responses focus on professional skills highlights the importance of acquiring and developing specific skills related to the field of work.

Communication skills, cited in 50% of responses, play an important role in effective interaction in the professional environment. This can include skills in written and oral communication, listening ability and emotional intelligence. The fact that communication skills were mentioned in a significant number of responses highlights the importance of these skills for successful teamwork and the effective communication of information and ideas.

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III. What are your personal and professional goals?
50 responses

In analysing the data provided from the question "What are your personal and professional goals?" we can draw the following conclusions. The answers fall into two categories: personal goals and professional goals. Personal goals related to improvement and development make up 74% of the responses. Professional goals related to working with students are mentioned in 54% of the responses, while professional goals related to growth and competences are mentioned in 74% of the responses.

Personal improvement and development goals, which were mentioned in 74% of responses, highlight the importance of continuous learning and expanding an individual's knowledge and skills. This may include self-education, personal development and achieving personal ambitions. The fact that almost a third of responses focused on these personal goals indicates the participants' drive for personal growth and achieving their potential.

Regarding professional goals, working with children was mentioned in 54% of responses. This highlights the interest of those involved in the education system in professional work that focuses on helping and developing children. This could include professions such as teacher, educator or child development specialist.

Professional goals related to growth and competence were mentioned in 74% of responses. This highlights the participants' desire to continuously develop their professional skills and competencies. They may seek to achieve a higher professional position, improve in a particular field, or acquire new knowledge and skills needed to succeed at work.

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IV. In what direction would you like to develop your potential?
50 responses

From the data provided to the question "In what direction would you like to develop your potential?" we can draw the following conclusions. The answers are divided into four areas: digital and computer technology, languages, creative activities, working with children, professional development, self-improvement and fulfilment in the workplace, and personal potential in individual and group work.

Digital and computer technologies, languages, creative activities were mentioned in 78% of the responses. This highlights participants' interest in developing and improving in technology, languages and creativity. In a technologically progressive world, digital skills and knowledge, including computer technology, are essential for success in a variety of professions. The development of language skills and creative activities also play an important role in personal and professional growth.

Working with students was mentioned in 32% of the responses, reflecting the participants' interest in child-related work. This could include professions such as teacher, educator, social worker and other fields that are focused on supporting and developing students.

Professional development, self-improvement and fulfilment at work were mentioned in 52% of the responses. This highlights the participants' desire to develop their professional skills and competencies, as well as to achieve a successful career and personal fulfilment at work.

Personal potential in individual and group work was mentioned in 14% of responses. This indicates the participants' desire to develop their personal skills and abilities in the areas of communication, collaboration and leadership in both individual and group work.

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V. What do you think are the current needs of school staff?
50 responses
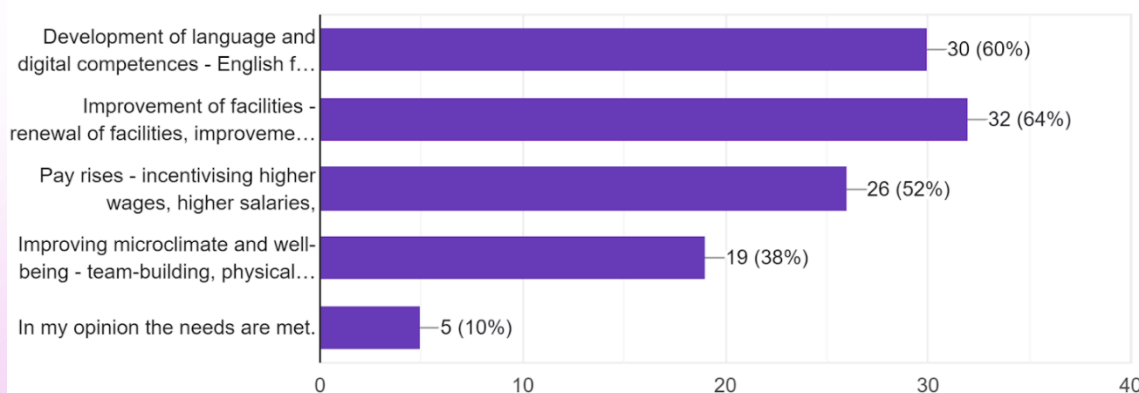
From an analysis of the data provided to the question "What do you think are the current needs of university staff?", we can draw the following conclusions. The answers are divided into four areas: developing language and digital competences, improving facilities, increasing remuneration and improving the microclimate and well-being.

The development of language and digital competences was mentioned in 60% of responses. This indicates the importance of improving the skills and knowledge of university staff in languages and digital technologies. In today's world where technology and communication are essential, developing these competencies can help university staff to be more effective and meet the needs of modern education.

Improving facilities was mentioned in 64% of the responses. This highlights the need to invest in upgrading and improving classrooms, technical equipment and other resources that are necessary for quality education. Improving facilities can create better conditions for university staff and students and support the achievement of educational goals.

Pay rises were mentioned in 52% of responses. This indicates the need for recognition and support for academic staff through adequate financial remuneration. Increasing remuneration can be an important incentive measure that will improve motivation and retain skilled and dedicated professionals in the education system.

Improving microclimate and wellbeing was mentioned in 38% of responses. This highlights the importance of creating a supportive and enjoyable working environment for university staff. This includes improving relationships and communication, providing sufficient support and resources, and ensuring conditions are in place to support the wellbeing and health of university staff. Only 10% of respondents expressed that their needs are met.
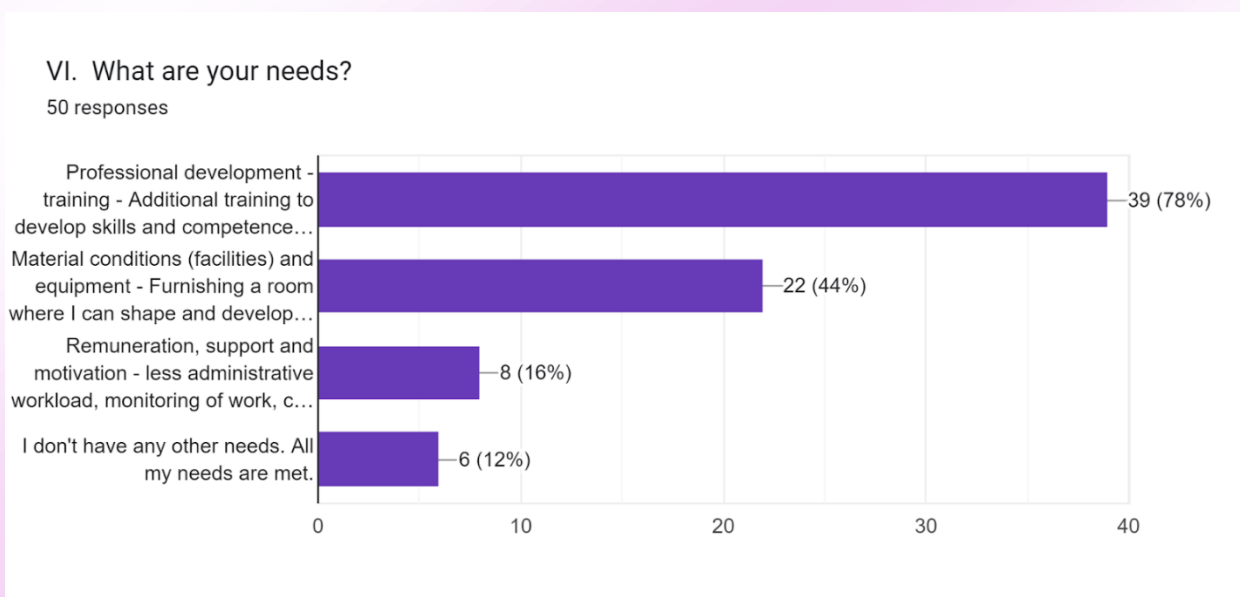
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VI. What are your needs?
50 responses

When analysing the data provided by the question "What are your needs?" we can draw the following conclusions. The answers are divided into three main areas: professional development - training, material conditions (facilities) and equipment, remuneration, support and motivation.

Professional development through training was mentioned in 78% of responses. This indicates the need for continuous improvement and acquisition of new knowledge and skills related to current professional activities. Professional learning can support personal and career growth by providing participants with the tools and resources necessary to successfully perform their duties.

Material conditions (facilities) and equipment were mentioned in 44% of the responses. This highlights the importance of providing adequate material resources that are necessary to carry out tasks and achieve objectives. Improving material conditions and equipment can create a more productive and efficient working environment.

Reward, support and motivation were mentioned in 16% of the responses. This indicates the need for adequate remuneration, management support and motivation to sustain and stimulate participants in every respect. Reward and support can contribute to employee satisfaction and talent retention, while motivation can encourage employees to achieve high performance and have an engaged and successful career.

12% of respondents expressed that their needs are met and they don't have any needs.

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VII. What would you change about your working conditions?

50 responses

Category	Value
Administrative work and organization - amount of admin…	20 (40%)
Support and training - sharing of skills and knowledge, mentorin…	18 (36%)
Material resources, facilities (base) and equipment - aesthet…	11 (22%)
Remuneration, support and motivation - incentive system w…	18 (36%)
I wouldn't change anything.	9 (18%)
infrastructure	1 (2%)

After analysing data from the question "What would you change about your working conditions?", we can draw the following conclusions. The answers are divided into four main areas: administrative work and organisation, support and training, material resources and conditions (facilities) and equipment, remuneration, support and motivation.

Administrative work and organisation were mentioned in 40% of the responses. This indicates the need for improvement in aspects such as the efficiency of administrative processes, the organisation of work tasks and the time taken to complete administrative duties. Improvements in this area can contribute to greater efficiency and productivity at work and free up time to focus on core professional tasks.

Support and training were mentioned in 36% of responses. This highlights the importance of having appropriate support from management and the organisation, and the opportunity for ongoing learning and development. Improving support and training provision can help employees develop and adapt to changing demands in the work environment.

Material resources, conditions (facilities) and equipment were mentioned in 22% of the responses. This indicates the need to improve the infrastructure and provide modern equipment that is necessary to perform work tasks effectively. Improvement in this area can create better working conditions and increase employee productivity.

Reward, support and motivation were mentioned in 36% of the responses. This indicates the need for adequate remuneration, management support and motivational measures to sustain and incentivise employees. Improvement in this area can increase employee satisfaction and motivation, which has a positive effect on work productivity and talent retention in the

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organisation. 18% of respondents wouldn't change anything, while only 2 % would change infrastructure.
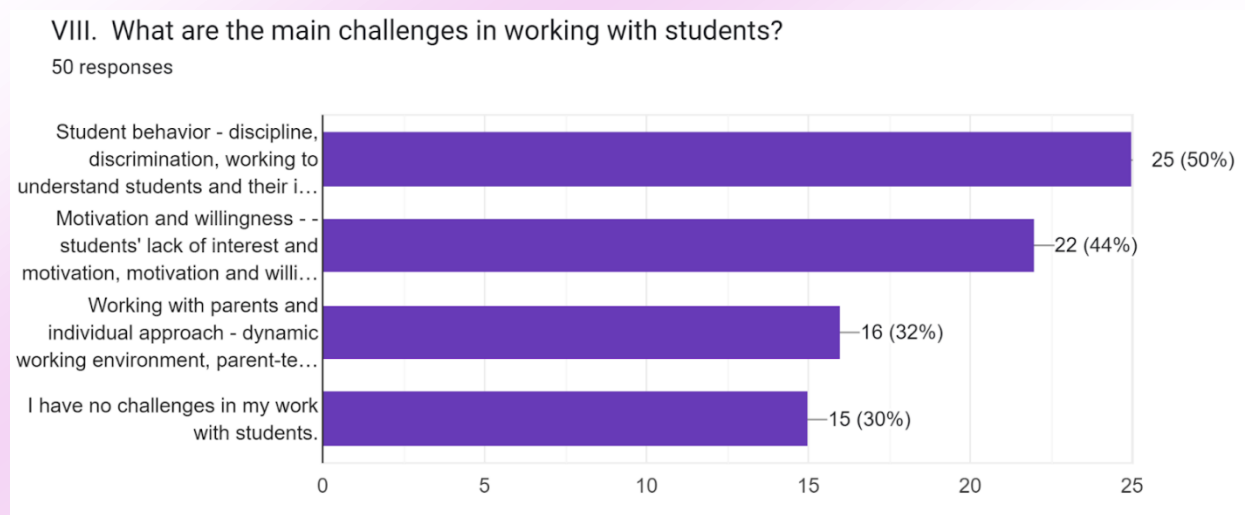
VIII. What are the main challenges in working with students?
50 responses

When analysing data from the question "What are the main challenges in working with students?" we can draw the following conclusions. The answers can be divided into three main challenges: student behaviour, motivation and desire, working with parents and the individual approach.

Student behaviour was mentioned as a major challenge in 50% of responses. This indicates the complexity involved in dealing with different types of behaviour and managing discipline in the classroom. An appropriate strategy is needed to manage behaviour difficulties and create an appropriate learning environment that supports good behaviour and academic achievement of students.

Student motivation and desire were mentioned as a challenge in 44% of responses. This highlights the importance of stimulating students' interest and motivation to learn and succeed. Improving motivation can include the introduction of varied teaching methods, innovative approaches and real-life connections to ensure greater student engagement and active participation in the learning process.

Working with parents and the individual approach was mentioned as a challenge in 32% of responses. This indicates the need to establish a partnership with parents and interact with them to support the learning process and student development. The individual approach requires teachers to adapt to each child's individual needs and abilities and provide personalised support.

30 % of respondents expressed that they have no challenges in their work with students.

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IX. What opportunities do you see for the development of school staff?
50 responses
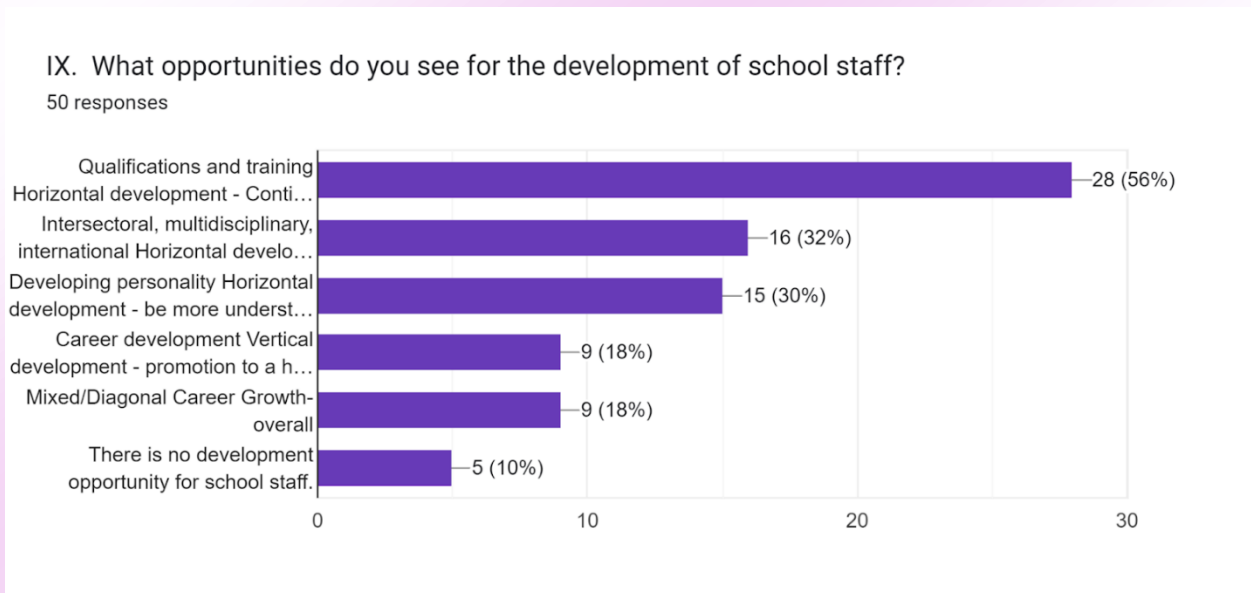
From the answers to the question "What opportunities do you see for university staff development?", we can draw the following conclusions. The responses break down into four main development opportunities: qualifications and training, cross-curricular, multidisciplinary and international opportunities, personal development and career development.

Qualifications and training were cited as the main development opportunities in 56% of responses. This highlights the importance of continuous learning and professional development for university staff. Continuing education, skills development and the acquisition of new qualifications can improve the competence of teachers and staff in universities and enable them to adapt to the changing demands and needs of students and the education system.

Cross-sectoral, multidisciplinary and international development opportunities were mentioned in 32% of responses. This indicates the need for collaboration and interaction between different sectors, disciplines and countries, which can provide new and diverse opportunities to share knowledge and experiences. Participation in international projects, mobility and collaboration with other universities and educational institutions can broaden the horizons of university staff and introduce them to new educational approaches and practices.

Personal development was mentioned as a development opportunity in 30% of responses. This highlights the need to support and promote the personal growth and well-being of university staff. Developing soft skills, self-improvement, managing stress and supporting work-life balance are important aspects of developing sustainable and successful university staff.

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Career development was selected by 18% of the participants who have set personal goals and aspirations to keep advancing in their field of work and use their ambitions as motivation to become better educators.

Mixed development was selected by 18% of the participants who have set personal goals and aspirations to keep advancing in their field of work and use their ambitions as motivation to become better educators.

10% of the respondents expressed that there are no development opportunities for university staff.

X. Do you think that school staff deal effectively with workplace stress?
50 responses
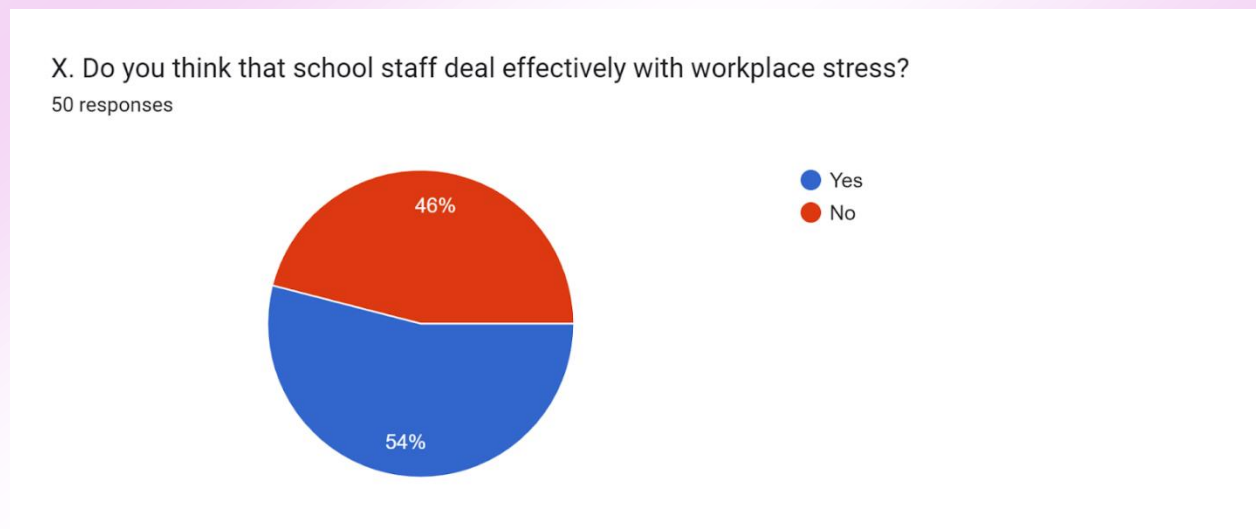
Analysis of responses to the question: "Do you think university staff deal effectively with stress in the workplace?"

The results show that 54% of the responses indicate that university staff manage stress effectively in the workplace, while 46% feel that they are not effective in managing stress.

This result highlights the importance of attention and care to the well-being and good working environment of university staff. Although a significant number of participants rated their effectiveness in dealing with stress positively, there were still a significant number who were not satisfied.

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XI. Do you think there is fluctuation of labor among school staff?
50 responses

Yes
No

44%

56%
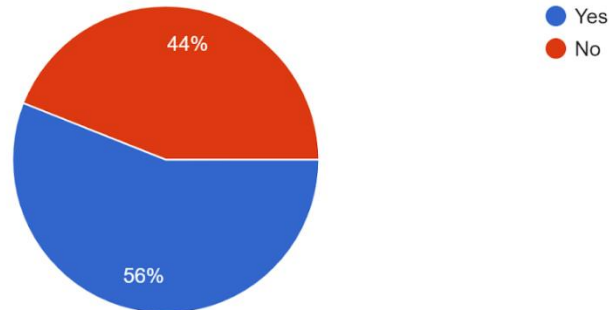
Responses to the question "Do you think there is turnover among university staff?" indicate that 56% of responses indicate that they think there is turnover among university staff, while 44% do not think turnover is a problem.

Turnover among university staff is a serious challenge that can have negative effects on the quality of education and the working environment at the university. The percentage of "yes" respondents indicates that turnover is occurring, but it is not widespread and yet work needs to be done to address this issue.

XII. Do you feel stable and secure at work?
50 responses
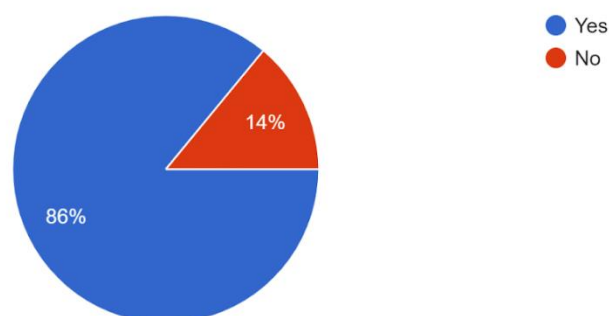
Yes
No

14%

86%

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When analysing the responses to the question " Do you feel stable and secure at work?" the following results are presented, 86% of the responses indicate that they feel secure at work, while 14% do not.

This is an encouraging result which indicates that a large proportion of university staff feel secure in their jobs. Feeling safe is important to establishing a productive and healthy work environment.

Still, consideration needs to be given to the 14% responses which indicate that some members of university staff do not feel safe. This could be the result of a variety of factors, such as a lack of support from management, conflicts in the work environment or a lack of clear security procedures and policies.
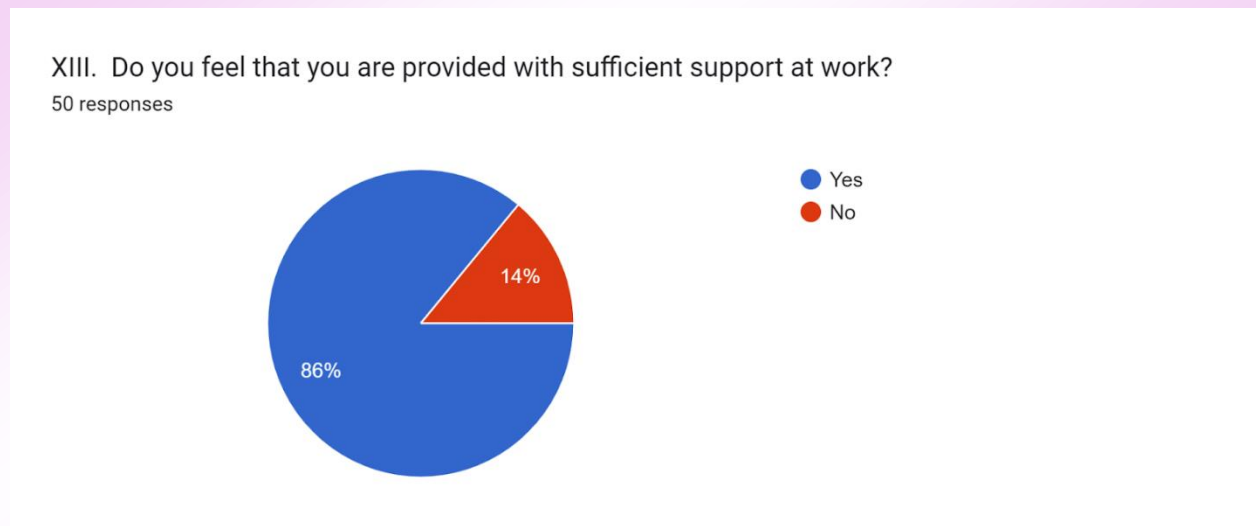
XIII. Do you feel that you are provided with sufficient support at work?
50 responses

- Yes
- No

From the responses presented to the question "Do you feel that you are given enough support at work?" it can be concluded that 86% of responses indicate that they feel they are given enough support at work, while 14% of respondents do not feel they are given enough support.

This result shows that a large proportion of university staff feel supported and assisted in their work. Support plays an important role in the motivation, confidence and general well-being of university staff.

However, consideration needs to be given to the 14% responses which indicate that some members of academic staff do not feel that they receive enough support. This may be a result of insufficient communication channels, lack of resources or unclear expectations.

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XIV. Do you think that the current work environment contributes to your personal and professional development?

50 responses

● Yes
● No

8%

92%
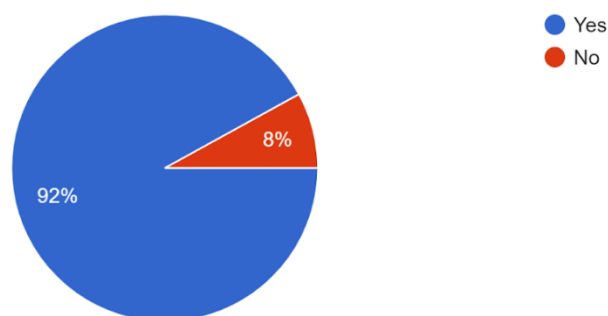
The results of the question "Do you think that the current working environment contributes to your personal and professional development?" show that 92% of respondents think that the current working environment contributes to their personal and professional development, while 8% of respondents do not think that their working environment has such an impact.

This shows that most university staff perceive their working environment as supportive and stimulating for their personal and professional growth. The working environment plays a key role in the motivation, satisfaction and development of university staff.

However, it is necessary to draw attention to the 8% responses which indicate that some members of university staff do not feel that their current working environment is helping them to progress personally and professionally.

Qualitative analysis:

The analysis of data on university staff capabilities and challenges underscores the significance of understanding and examining this information to enhance the educational process and work environment. The presented data focused on staff development opportunities, aiming to derive key observations and correlations. This analysis helps identify staff interests and areas of particular importance. It's important to note that percentages are based on respondent feedback.

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Qualifications and Training: Responses from interviews revealed interests in external qualifications, updating facilities and visual aids, international training, participation in training, internal qualifications, maintaining professional competence, continuous training, courses on selected topics, and internal qualifications. Notably, 54% of responses related to qualifications and training opportunities, indicating a strong interest among staff in expanding their professional skills and competencies.

Cross-sectoral, Interdisciplinary, and Global Prospects: Participants expressed interest in project activities, interdisciplinary connections, and the exchange of experiences and best practices, including international collaborations. This highlights the importance of broadening staff perspectives beyond conventional educational boundaries, enhancing their experiences.

Personality Development: Responses indicated a strong desire for personal development, with 74% of staff emphasizing self-improvement, personal growth, and leadership skills. Key areas included developing team relationships, responsibility in task completion, initiative, resourcefulness, understanding each other, and acquiring new skills.

Challenges in Working with Students:

Student Behavior: Half of the staff identified student behavior as a significant challenge. Issues included discipline, discrimination, anti-social behavior, low attention stability, mental and physical development, and aggressive behavior.

Motivation and Desire: 44% of respondents noted challenges related to students' lack of interest and motivation. This includes difficulties in stimulating and sustaining student interest and motivating different student groups.

Working with Parents and Individual Approach: Respondents highlighted challenges in communicating with parents and addressing individual student needs. This included negative parental evaluations affecting students and the need for personalized approaches.

Recommendations for Improving Working Conditions:

Training and Qualifications: With 78% of responses indicating a need for professional development training, additional skills development, qualifications, and language learning, universities should invest in systematic, targeted training programs.

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Material Conditions and Equipment: 44% of respondents emphasized the need for improved facilities and equipment, including resources, books, technological tools, and other teaching aids.

Reward, Support, and Motivation: 36% of respondents desired incentive systems, bonuses, higher salaries, reduced administrative workloads, and constant motivation. Addressing remuneration, support, and motivation can enhance staff engagement and satisfaction.

Developing Microclimate and Well-being: Responses indicated the importance of physical and mental well-being, reducing workplace stress, stimulating creativity, teamwork, communication, and fostering transparency and honesty in relationships.

Perceptions of a Supportive Work Environment:

Dealing with Stress: 54% of participants felt they managed work stress effectively, though 46% indicated a need for additional support and resources.

Staff Turnover: 56% believed there was turnover among staff, pointing to issues like insufficient motivation, low remuneration, and lack of development opportunities.

Sense of Job Security: 86% felt secure at work, but 14% saw room for improvement in creating a secure work environment.

Support Provided in Work: 86% felt adequately supported, while 14% desired additional support, highlighting the need for ongoing improvements.

Work Environment and Personal-Professional Development: 92% believed their work environment fostered personal and professional growth, emphasizing the importance of maintaining a positive work environment.

This analysis identifies the main challenges and needs of university staff, offering recommendations to improve working conditions and support in the educational environment.

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5. Conclusions and recommendations

Conclusions and recommendations from Cyprus (IMS Private School):

The conclusions drawn from the study conducted at IMS Private School in Cyprus about working with education workers are as follows:

- Personal and Professional Qualities and Skills: Participants emphasized the significance of moral, social, and business qualities in the educational field. This underscores the importance of ethical and social aspects of work, as well as the need for business orientation and relevant skills.

- Personal and Professional Goals: Individual development and working with children emerged as key professional goals for the participants. This indicates their desire for personal and professional growth and their interest in engaging with children.

- Potential Development: Digital and computer technologies, languages, and creative activities were identified as crucial for developing participants' potential. This points to the need for modernization and innovation in the learning environment, along with diversity and creativity in the educational process.

- Staff Needs: The primary needs of the participants include developing language and digital competencies, improving facilities, increasing remuneration, and enhancing the microclimate and well-being. These needs highlight the importance of support in training, infrastructure, and the working environment.

- Performance evaluation and conditions: Participants expressed appreciation for the effectiveness of staff in dealing with stress, job security and the support provided to them. This highlights the importance of a stable working environment, remuneration and support for staff.

- Findings from the research indicate the need to focus on developing personal and professional qualities, improving working conditions and providing support and training for staff in the educational organization. This will contribute to creating a stable and supportive working environment in which staff can develop and achieve the best in their educational performance.

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Recommendations for working with education professionals based on the results of the questions from the study in Cyprus (IMS Private School):

1. Personal and Professional Development:

- Provide Opportunities for Improvement and Development: Create a structured framework for continuous learning and development by offering training programs and qualifications in fields pertinent to the staff within the educational organization. This should encompass training in digital and computer technologies, language acquisition, and creative activities, ensuring that the staff is equipped with the skills needed to thrive in a modern educational environment.

- Support Work with Children: Enhance the ability of staff to meet the diverse needs of children by offering specialized training. This training should focus on understanding children's developmental stages, recognizing their unique needs, and responding effectively to various challenges, thereby fostering a supportive and nurturing learning environment.

- Foster a Culture of Continuous Improvement and Fulfillment: Encourage a mindset of lifelong learning and self-improvement among staff members. This can be achieved by promoting engagement in professional development activities, providing opportunities for career advancement, and recognizing the achievements of staff. By doing so, the educational organization can cultivate a positive and fulfilling workplace culture.

2. Development of Staff and Improvement of Working Conditions:

- Invest in Language and Digital Competencies: Prioritize the development of language and digital skills among staff by providing comprehensive training programs and necessary resources. This investment will help staff adapt to evolving technological demands and enhance their ability to deliver high-quality education.

- Enhance Educational Facilities: Improve the physical and technological infrastructure of the educational organization by ensuring that sufficient resources and modern equipment are available. This investment is crucial for creating an optimal learning environment that supports the academic and developmental needs of students.

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- Explore Opportunities to Increase Staff Pay: Conduct thorough evaluations to identify opportunities for offering competitive salaries and additional incentives. By providing attractive remuneration packages, the organization can motivate staff, enhance job satisfaction, and reduce turnover rates, thereby retaining experienced and skilled educators.

3. Overcoming Challenges of Working with Students:

- Address Behavioral Challenges: Equip staff with the tools and knowledge needed to manage behavioral issues and conflicts effectively. This can be achieved through targeted training in behavior management and conflict resolution strategies, enabling staff to maintain a positive and conducive learning atmosphere.

- Motivate and Support Students: Develop comprehensive systems and programs designed to stimulate students' interest and desire to learn. Offer a diverse range of educational and extracurricular activities that cater to various interests and talents, thereby inspiring students and encouraging their overall development.

- Strengthen Relationships with Parents: Foster strong partnerships between staff and parents by promoting open communication, organizing regular meetings, and encouraging collaboration. By working together towards common goals, both parties can ensure the holistic development of students and enhance the educational experience.

Implementation and Benefits:

The successful implementation of these recommendations will significantly contribute to the personal and professional growth of staff within the educational organization. By improving working conditions and fostering a culture of continuous improvement, the organization can enhance job satisfaction and staff retention. Additionally, these efforts will elevate the quality of education provided, which is essential for the overall development of students and the successful functioning of the education system as a whole. Through strategic investments in training, resources, and facilities, the educational organization can create a thriving environment that supports both educators and learners, paving the way for future success.

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Conclusions and recommendations from Bulgaria (Hristo Botev School):

The conclusions from the results of the study on the needs and strengths of HR at Hristo Botev Primary School in Varna, Bulgaria are as follows:

- Personal and professional qualities and skills. Participants noted the importance of moral, social and business qualities in the educational sphere. This highlights the importance of ethical and social aspects of work, as well as the need for business orientation and work-related skills.

- Personal and professional goals. Individual development and working with children are two of the key professional goals of the participants. This indicates their aspiration for personal and professional growth as well as their interest in working with children.

- Potential development. Digital and computer technologies, languages and creative activities are highlighted as important avenues for developing participants' potential. This highlights the need for modernisation and innovation in the learning environment, as well as diversity and creativity in the learning process.

- Staff needs. Developing language and digital competencies, improving facilities, increasing remuneration and improving microclimate and well-being are the main needs of the participants. These needs reflect the importance of support in the areas of training, infrastructure and working environment.

- Performance evaluation and conditions. Participants expressed appreciation for the effectiveness of staff in dealing with stress, job security and the support provided to them. This highlights the importance of a stable working environment, remuneration and support for staff.

Findings from the research indicate the need to focus on developing personal and professional qualities, improving working conditions and providing support and training for staff in educational organizations. This will contribute to creating a stable and supportive working environment in which staff can develop and achieve the best in their educational performance.

The recommendations for working with education professionals based on the results from the study at Hristo Botev Primary School, are as follows:

1. For personal and professional development:

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- Provide opportunities for improvement and development by providing training and qualifications in areas that are relevant to staff in the educational organization. This includes training in digital and computer technology, languages and creative activities.

- Support work with children by providing specialist training to help staff in the educational organization understand and respond to children's needs.

- Build a culture of continuous improvement and fulfillment in the workplace by encouraging staff in the educational organization to engage in professional development and self-improvement.

2. To develop staff in the educational organization and improve working conditions:

- Invest in developing the language and digital competencies of staff in the educational organization by providing training and resources that will help them adapt to modern demands and technologies.

- Improve educational organization facilities by providing sufficient resources and equipment that are necessary for quality learning and development of students.

- Explore opportunities to increase staff pay by providing competitive salaries and additional incentives to motivate and retain them in the system.

3. To work with the challenges of working with students:

- Assist staff in addressing behavioural challenges by providing support and training in behaviours management and conflict management.

- Build a system to motivate and support students that will stimulate their interest and desire to learn. Provide a variety of educational and extracurricular activities to inspire and motivate them.

- Develop a strong relationship between staff in the educational organization and parents by encouraging open communication, regular meetings and collaboration to achieve common goals.

The implementation of these recommendations will help to develop staff in the educational organization, improve working conditions and raise the quality of education, which is essential for the development of students and the successful functioning of the education system.

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Conclusions and recommendations from Poland (WSBINOZ):

Based on the findings of the study concerning working with education professionals, several key conclusions can be drawn:

- Personal and Professional Qualities and Skills: Participants underscored the significance of moral, social, and business acumen within the educational sphere. This emphasizes the crucial role of ethical and social considerations in their work, alongside the importance of business-oriented skills.

- Personal and Professional Goals: The primary professional aspirations identified by participants include individual development and a commitment to working with children. This indicates their strong dedication to personal and professional growth, as well as their enthusiasm for positively impacting young learners.

- Potential Development: Digital and computer technologies, languages, and creative pursuits emerged as pivotal areas for enhancing participants' potential. This highlights the imperative for modernization and innovation in educational settings, fostering diversity and creativity in the learning process.

- University Staff Needs: The participants' foremost needs encompassed the enhancement of language and digital competencies, improvement of facilities, augmentation of remuneration, and optimization of the workplace atmosphere and well-being. These needs underscore the importance of supportive measures in terms of training, infrastructure, and the work environment.

- Performance Evaluation and Conditions: Participants expressed appreciation for the effectiveness of university staff in managing stress, ensuring job security, and providing adequate support. This underscores the criticality of a stable work environment, competitive remuneration, and robust staff support systems.

Implications and Recommendations for Working with Education Professionals
Based on the insights gleaned from the study, the following recommendations are proposed for effectively working with education professionals:

- Promoting Personal and Professional Development:

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Facilitate continuous improvement through targeted training and qualifications that are aligned with the evolving demands of the educational landscape. This includes proficiency in digital tools, languages, and creative methodologies.

Provide specialized training to equip university staff with the skills necessary to understand and respond to the unique needs of children.

Cultivate a culture of ongoing professional development and fulfillment by encouraging staff to actively engage in self-improvement initiatives.

- Enhancing Staff Development and Improving Working Conditions:

Invest in enhancing the language and digital competencies of university staff through comprehensive training programs and access to cutting-edge resources.

Improve university facilities by ensuring adequate provision of resources and equipment essential for fostering high-quality learning environments.

Explore strategies to enhance remuneration packages and introduce additional incentives that promote staff motivation and retention within the education sector.

- Addressing Challenges in Student Engagement and Support:

Support university staff in managing behavioral challenges by providing comprehensive support and training in behavior management and conflict resolution techniques.

Foster a stimulating learning environment by implementing motivational strategies and diverse educational activities that ignite student interest and enthusiasm.

Cultivate strong partnerships between university staff and parents through open communication channels, regular meetings, and collaborative efforts aimed at achieving shared educational goals.

Implementing these recommendations will not only foster the professional growth of university staff but also enhance working conditions, thereby elevating the overall quality of education. This approach is crucial for nurturing student development and ensuring the effective functioning of the education system as a whole.

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V. Analysis of future labor requirements in the organization. General provisions.

1. Human Resources in educational organizations

Human resource (HR) management in organizations deals with the recruitment, staffing, welfare, maintenance, training, promotion, motivation, compensation / rewards, transfer and discipline of staff (Omebe, 2014). It is essential for the efficiency of an organization and influences the work performance of the employees. In the case of educational organizations, when the staff is adequately chosen, supervised, compensated and trained, they become loyal to the job, more motivated and productive (which also benefits the students and helps with the achievement of the educational objectives). Without the presence of employees with high skills and motivation, the development of educational organizations would not be possible.

Thus, HR management in educational organizations is a process of motivating employees to maximize their work performance. In other words, to utilize their abilities and skills to perform their responsibilities at the institution. HR can be defined as the most important resource which is needed for the production of goods and services. They are essential for socioeconomic development and service delivery (Onah, 2008). Specifically in the education field, every educational system depends on HR for execution of its programme. Educators are crucial resources for the effective realization of educational policies and objectives. They implement the policies within the curriculum, and support the achievement of the educational objectives (Omojunwa, 2007). Trainers also maintain and improve educational standards and that is why they serve an important role.

If there is poor HR management, this negatively affects the implementation of the curriculum by educators. In HR in education three aspects are important: assessing the needs for staff, satisfying the needs for staff and maintaining and improving staff services. When it comes to the objectives of HR management in education, they are to develop the employees' capacity and support the achievement of organizational objectives. There are specific roles such as strategic and operational roles.

As regards the strategic role, human resources are crucial for the effectiveness of educational functioning. HR's importance has increased in the last 20 years as well as the need for

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adequately chosen, trained and compensated staff that is loyal to the job and strives for better productivity at work. If HR in educational organizations is managed properly, they can be a strength for the educational sector. They are just as important as financial and technological resources in the organization (Onah, 2008).

As for the operational role, Mathis and Jackson (1997) have stated that operational activities are both tactical and administrative. In addition to this, HR management is about equal employment opportunities and observation of labour laws – this involves the training of supervisors, solving of safety problems and administering wages and salaries. The range of activities related to daily management is wide and laws and regulations must be observed.

In the field of education, HR management consists of practices and methods for the integration and maintenance of staff so that the educational organization can achieve its main objectives. This concerns the employees' motivation and effort for maximum work performance. The functions of HR in education include the following:

- ➢ *Maintenance of staff* – related to creating an appropriate work environment for employees through promotion, transfer, motivation, ensuring staff safety and security. Educational organizations need to have relevant policies for staff transfer and promotion to ensure fairness for all employees. To ensure maximum productivity and goal achievement, the educational institution must guarantee the comfort and well-being of staff. Methods to do this include paying salaries on time and creating a safe and healthy work environment.

- ➢ *Staff relations –* this involves the establishment of an effective communication network at the educational organization to ensure that all employees are informed of the progress being made. Staff should be motivated to participate in the decision-making at the school / university. They need to be treated with fairness and respect and individuals with their own needs and feelings.

- ➢ *Staff development* concerns the evaluation of staff performance and the identification of their skills and competencies, and those that need further development or training. This can include the provision of development programs, training courses, workshops, seminars, conferences, and other. Proper staff development is important for the success of the educational institutions and the quality of teaching provided to students.

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➢ *Staff procurement* - HR management begins with the process of recruitment (educational institutions choosing the most capable employees). Staff procurement in the educational sphere is related to recruiting individuals with the relevant and necessary competencies, knowledge and experience.

➢ *Performance rewards* – this includes the giving of rewards to employees for the jobs performed. It is very important that the issue of rewards is taken seriously by the educational organization. The performance of employees increases significantly with appropriate compensation in accordance with the quality and quantity of work.

However, there are challenges that can occur in HR management in the educational field. This is because there are factors and complexities contributing, such as:

➢ *Poor working conditions* – staff needs to be paid according to their work performance**.** There should also be a sound reward system and structure established. If workers are properly compensated, this reduces inequality and raises morale and motivation for work. This also reduces intergroup conflicts and grievances.

➢ *Staffing problems* – these are problems related to the quality and quantity of employees in the educational institution. They can be caused by a poor recruitment and selection process.

➢ *Using ICT in education* – In modern times, there is a need for using ICT in education (especially during distance learning). ICT provides fast dissemination of information and knowledge, work decentralization, expansion of the workforce, and a learning environment in which the educator becomes a facilitator for students. Thus, a higher ICT skill is necessary to be acquired by all teachers.

Other HR challenges that can affect the goal achievement within educational organizations include lack of discipline, issues with funding, poor recruitment, poor supervision and staff evaluation, poor staff commitment and motivation, and others. Considering the importance of human resources, education should be made more attractive through the creation of a positive working environment for teachers. Moreover, digital skills and computer literacy should be encouraged among educators in order for them to better adapt to the new demands of the profession and achieve the objectives of the educational organizations.

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2. Retirement

Educators have an unusual mix of potential income sources in retirement. As a teacher, you're likely to be eligible for a defined-benefit pension plan. Whether you teach in a public school or a nonprofit private school, you'll also typically have access to a defined contribution retirement plan, such as a 403(b) or 457(b).

However, you may not be eligible for Social Security retirement benefits. According to the National Association of State Retirement Administrators, about 40% of teachers do not pay into the Social Security system, making them ineligible to claim benefits once they retire.

These variables make retirement planning for teachers unique and sometimes challenging. Here are some retirement moves that educators should consider:

Consider Defined Contribution Plans

If you work full-time for a public school or a tax-exempt private school, you should be eligible to contribute to at least one defined contribution plan sponsored by your employer.

403(b) Plans:

The most common type of defined contribution plan for teachers is the 403(b) plan. Closely resembling the private sector's 401(k) plans, a 403(b) lets you have money deducted from your paycheck and put into your chosen investments. In 2022, the IRS's contribution limit was $20,500. In 2023, it is $22,500.

Your contributions are generally tax-deductible, and your investment earnings are tax-deferred; you pay tax on that money only when you make withdrawals in retirement. If you'd prefer to pay the taxes now instead of when you retire, you can contribute to a Roth 403(b) instead if your employer offers the option.

Your employer may make matching contributions to your 403(b) plan, although that's less common than it is with 401(k) plans. For example, your employer might match 50% of your contributions, up to 6% of your salary. So if you earn $75,000 and contribute at least 6% of your salary to the plan, your employer would kick in an additional $2,250. That's essentially free money for retirement.

You may be able to have both a 403(b) plan and a 457(b) plan.

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457(b) Plans:

If you work for a public school district, you may be able to participate in a 457(b) plan in addition to or instead of a 403(b) plan. As with 403(b) plans, your 457(b) contributions come directly out of your salary, and your money grows tax-deferred until you withdraw it.

If you work for a private school that is classified as a tax-exempt organization, you may not have access to a 457(b) unless you are a highly compensated employee; those are the federal government's rules. One downside of 457(b) plans is that employers usually don't provide matching contributions. But there's also an upside: When you leave your job, you can start taking distributions from your 457(b) without penalty, even if you haven't reached retirement age.

If you're considering early retirement or early partial retirement, a 457(b) can help you fund that goal. With both 403(b) and 457(b) plans, your contributions were limited to $20,500 per year in 2022 and are limited to $22,500 in 2023. If you are over 50, your plan may allow an additional catch-up contribution of $7,500 in 2023, up from $6,500 in 2022.

But there's another perk with 457(b)s: Participating in one doesn't preclude you from contributing up to the maximum to a 403(b). If you maxed out your contributions to both a 457(b) and a 403(b) in 2022, you'd be putting away a whopping $41,000 ($45,000 in 2023)— more if you're over 50. And with a 457(b), when you're three years away from the plan's stated retirement age, you can opt to start saving even more—either twice the annual limit or the sum of the current year's limit and any unused portions of previous years' contribution limits, whichever is less.

Government Pension Offset:

Your participation aside, you might be eligible for spousal Social Security benefits if you're married and your spouse pays Social Security taxes. However, if you also have a pension, benefits received through your spouse might be reduced under government pension offset (GPO) rules. Typically, Social Security benefits will be reduced by two-thirds of the monthly pension amount.

For example, if the pension were $600 monthly, the Social Security benefit would be reduced by $400 per month. If the Social Security benefit were expected to be $500 per month, you would only receive $100 from Social Security while getting paid a $600 per month pension.

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According to Wyatt Moerdyk, CCO and managing member, Evidence Advisors Investment Management in San Antonio, "Many teachers rely on spousal Social Security benefits, only to find out later that they are dramatically reduced by the GPO rules.".

Weigh Working After You Retire

Not everyone wants or can afford to quit working after retiring from a full-time career in teaching. In fact, teachers. have faced wage stagnation for years, leading them to make significantly less than other college graduates.

If you expect to teach part-time, work in another profession part-time, or start a full-time encore career, think about how that income might affect what you need to save today.

That being said, not everyone can work when they're older. Some people might have to care for aging parents, and others will find that their health prevents it. Sometimes jobs are hard to find. To play it safe, it's best not to base your financial plan on the assumption that you'll continue to earn income from work after you retire.

Ensure You'll Have Enough Insurance

Continuing to work after you retire can also be a cost-effective way to keep health insurance and other coverage you may need, at least until you're eligible for Medicare at age 65. For example, if you received life or disability insurance as an employee benefit while you were working, make sure you still have enough coverage, and if not, supplement it with a private policy after you retire.

What Is a Good Retirement Plan for Teachers?

Many teachers have access to a 403(b) plan, which is very similar to a 401(k) plan. This can be a very useful retirement tool as many teachers do not pay into Social Security, so they cannot rely on those benefits when they retire. A 403(b) plan is a good tool to save, particularly if the plan includes matching contributions from the employer.

How Much Should a Teacher Save for Retirement?

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It is recommended teachers save approximately 15% of their income for retirement. Their pension contributions will account for a certain percentage, and the remainder can be made up through retirement account contributions, such as a 403(b) plan.

Why Do Teachers Not Get Social Security?

Teachers do not get Social Security because they do not pay into Social Security. The reason is that they pay into a pension, which acts as Social Security benefits would when they retire.

While many teachers cannot rely on Social Security benefits during retirement, they do have plenty of other options. Most teachers have access to defined-benefit plans; though these pension amounts have been decreasing over the past few years, teachers can also contribute to defined contribution plans. If you're a teacher and planning your retirement, it is best to take advantage of both these options to ensure a comfortable retirement.

(The Top Retirement Strategies for Teachers , Barone, 2023)

The biggest obstacle for employers is that there is no definitive way for them to know when an employee will retire, since age is not necessarily a reliable indicator. Some workers may retire at age 57, while their colleagues of similar age may work much longer.

Employers could ask employees about their retirement plans, but they must do so with caution and advice from legal counsel. They must not create the impression that they are pushing older workers into retirement.

Employers can also look at overall workforce data. Using these numbers, they can answer a few questions that can help them better plan for retirements:

- What will the workforce trajectory look like if older employees retire at a specific age, and how will that impact operations?
- Which business units could be significantly hampered if they have a large number of older workers who retire?

Employers should also identify areas of operations in which people are not retiring as expected, limiting promotional and learning opportunities for younger workers.

Analyze Benefit Data

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Employers can find signs of impending retirements by looking at the past, according to Lauren Hoeck, a director in the retirement practice of Willis Towers Watson in Arlington, Va. She suggested looking for historical retirement trends for specific employee segments, by job or location or for the whole employee population.

Hoeck advised to "look at data that correlates to past retirements and compare it to the population today". For example, the data could show that employees over a certain age who do not renew required training or certifications are apt to retire within a certain amount of time.

Employees' use of health benefits can provide insight into when they may retire, according to Hoeck. For example, if employees are purchasing the most expensive health plan offered, they may be putting more discretionary income toward paying for current health care for themselves or family members rather than funneling that money into the 401(k) plan. Those employees may stay on the job longer to maintain that coverage or because they may not have enough saved for retirement.

How much employees are contributing to health savings accounts (HSAs) and how they are using those funds could also indicate when an employee will be ready to retire. Are employees rolling over all or some of their HSA funds year after year for use in retirement, or are they using those funds to pay for current medical expenses?

Other analyses can look at employees' past use of benefits such as:

- Retirement plans. Compare defined contribution plan account balances and expected pension plan benefits to employees' salaries at the time of retirement. This can show how much income employees may want to replace before retiring.
- Retiree health coverage. If the organization offers retiree health benefits, factor this, along with how long employees might have to wait to be eligible for Medicare coverage, usually available at age 65, into any calculations on their ability to retire.

Any analyses of data on current workers should be done with care. For that reason, Price urged HR leaders to involve the CEO, as well as leaders from the technology and legal departments. The legal department or outside counsel can provide guidance on appropriate use of employee data, while technology leaders can ensure that doing so is not considered a data breach or violation of privacy policies.

Focus on Knowledge and Skills Transfer

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At a very basic level, data can also show where older workers reside within the organization. For example, if a specific department or facility has a large cluster of employees ages 55 and older, that could indicate that the employer must develop or improve processes for knowledge transfer and succession planning.

According to Hoeck "If an employer is concerned about the loss of knowledge and skills, they have several options," including redeploying older workers and including them in training programs to facilitate knowledge transfer.

Employers may be able to keep older workers on the job long enough to share their knowledge or skills by offering them new roles that might be less intensive, such as moving them from manager to individual contributor, or allowing them to work part time or only part of the year, she suggested.

Maintain a Dialogue

Talking to employees can reveal their retirement plans. This does not mean asking them directly when they plan to retire. Instead, employers and front-line managers and supervisors can use insight gained during career discussions and annual reviews about employees' career plans to determine when they might retire.

If employees offer information about when they want to retire, that discussion becomes an opportunity to structure a working arrangement to support a longer work life or a transition period if that's what both sides want or need.

According to Price, "It is easier to engage in these conversations early on. Closer to retirement, these conversations become harder to conduct," since employees may already have made specific retirement plans.

(https://www.shrm.org/resourcesandtools/hr-topics/benefits/pages/preparing-for-waves-of-retiring-employees.aspx Sammer, 2020)

While in the everyday workspace, it is hard for employees to envision a future where they may have retired. The inflated cost of living and wages that do not align with it, makes it difficult to imagine what saving for the retired life should be or even how to begin planning it. To help employees with their post-retirement finances, HR managers can introduce retirement planning

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tools as a welfare initiative in their organizations. These help employees to work on their future financial goals and can gain the organization satisfied and productive employees.

How Retirement Planning Tools Help Employees

Retirement planning tools as obvious from the phrase are digital platforms specifically used to manage and monitor how much money employees have in savings and the corpus they will need to retire comfortably. However, many employees may not have complete clarity about the various features these tools can offer.

For instance, many of these tools will pool data from your various sources of income and build a plan for projected expenses, and how much of these expenses are covered through your Social Security benefits.

While most banks and investment firms have these tools, HR managers can also look at independent retirement planning tools for their employees to ensure they make informed decisions for their retirement benefits. HR teams must also guide employees to assess tools based on their retirement needs. Whether it is a thorough and comprehensive outlook or a quick-glance overview of their potential retirement plans, research can help employees find the best retirement planning tools.

Common Retirement Planning Tools for Employees

Here are a few of the best retirement planning tools HR managers can share with employees in their organizations:

1. Personal Capital

Personal Capital's retirement planner can be used to calculate if your retirement planning is on track and what improvements can be made to it for greater success. This platform's impressive features include a Recession Simulator that measures the impact of your savings if a stock market crash or an economic downturn were to happen. It also offers scenario analysis that can show the different ways you can reach early retirement, future costs, social security and/or pension add-ons, and economic assistance.

2. Betterment App

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Being an app, Betterment is one of the leading retirement planning tools that analyze how life events affect savings and help streamline your finances to get a complete picture of where you stand economically. This aids employees in knowing how to focus on their financial well-being, and plan how to increase their savings or income to have a financially stable future.

The app also connects employees to experts and advisors for each financial requirement, be it medical insurance, 401K investments, tuition fees for children, and more. Professional insights are bound to result in employees getting appropriate guidance for their needs. This platform also has a feature that helps employees save money during tax filings.

Since they account for retirement age, the city you reside in, and the employees' unique social security benefits, it can help them understand accurately the amount you need to save to retire peacefully.

3. Vanguard

Vanguard is also one of the commonly used retirement planning tools by HR managers. It has a retirement income calculator with an interactive measurement tool that allows employees to add their age, anticipated retirement age, annual income, yearly savings, social security benefits, and monthly pension to find out how much money they need to save for retirement.

Knowing how much to save aligned to their retirement goal and various paths to reach this target helps employees plan their finances better. Vanguard assures that they do not save user data online, protecting employees from any misuse of it.

4. New Retirement

Another amongst the list of effective retirement planning tools HR managers can suggest to employees are New Retirement, which has several more features besides helping calculate the amount needed for a peaceful retirement. The tool also enables employees to be steadfast on the path to a secure retired future.

Employees can get an analysis of all available retirement plans, and add their data to the calculator, besides seeing detailed charts as to when they can retire, the retirement income they can create, the amount of savings needed for this, and their net worth. Employees can also avail themselves of their professional advisor services.

5. Fidelity Retirement

Fidelity has a planning and guidance center that offers a complete overview of your retirement planning. Employees can explore changes or life incidents that prepare them better to face

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sudden events. HR managers can avail of several options on this platform and offer the same to the employees in terms of tools and calculators to measure financial adjustments, IRA contributions, Roth conversion, social security benefits, and more.

6. WalletBurst

This platform provides FIRE, compound interest, and savings rate calculators to allow employees to measure what they will need for retirement. Stocks, bonds, cash, and asset allocations can also be considered in your retirement calculations.

Using WalletBurst's interactive calculator, employees can visualize the growth of their net worth while aiming at financial independence. Employees can even add more factors like safe withdrawal, inflation, company 401K, and income growth rates within the calculator.

7. Bankrate

Bankrate offers employees an annual breakdown of the amount of money needed to retire. It also provides definitions of financial terms like annual contributions, rate of return, inflation rate, tax rate (before and during retirement), and tax deferments.

With Bankrate, employees can see not just how much they need to retire but also find explanations for why that much is needed. Their retirement planning tool assesses how much monthly income the employee's retirement savings will provide by factoring in annual savings, the expected rate of return on these savings, and the current age of the retiree to calculate monthly retirement income.

To sum: HR Managers can help employees with all the above retirement planning tools and help them anticipate their future financial outlook. When employees are not stressed about their uncertain future economic standing, their productivity is bound to improve. Platforms like these allow employees to be proactive in achieving their financial goals. Knowing how much money you will need to save, anticipating unexpected costs, and balancing multiple streams of income help employees with financial planning.

Besides this, it reassures employees about life after their careers and encourages them to prepare for that phase in life. Using these services gives employees an advantage to keep planning for a good financial future. And, for retirement planning, the earlier employees start saving, the brighter it will be.

(https://www.techfunnel.com/hr-tech/retirement-planning-tools/ Benson, 2022)

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If the entire HR department is 55+, you have trouble brewing. As older HR workers retire or make lateral moves, you should have a plan in place so that younger specialists and managers have time to learn from their older peers and be ready to step into senior roles when the time comes.

Some managers unconsciously get into the mind-set of thinking they need someone of a particular age, gender or other external characteristic rather than focusing on skill set.

A succession plan that outlines each position's key roles and responsibilities can help an organization shake such self-limiting behaviors and create opportunities to find excellent replacements for retiring workers. Remember, someone's style or work cadence doesn't necessarily equate with an ability to learn or fulfill a new role.

Aging employees need to know that it's part of their job to train the younger generation, and younger workers need to know it's their job to learn from their more experienced peers. At the same time, you don't want to signal to older workers that their experience is unappreciated or unneeded, or that you think it's time for them to leave.

You can help facilitate cross-generational learning by reminding everyone that there is much to be learned from different perspectives and work styles. Often, if the leader fosters an open-sharing work environment it can minimize feelings of ageism or discrimination that older workers may feel as they begin to transition.

An open environment can be as simple or complex as the leader desires. It may take the form of quarterly team huddles. For a younger manager, showing respect to older workers might mean planning a staff outing to a museum rather than a rock-climbing facility. For an older manager, it might mean encouraging senior staff to mentor a younger employee or engaging them in the process of planning for their retirement.

Whether it's succession planning or knowledge sharing, you should conduct a retirement assessment annually. Take a look at which departments or jobs may be heavy on soon-to-retire employees. Have conversations with your long-time employees and ask, "What do you do that's not in your job description? How do you do it?"

Tenured employees are often the ones who've created bypasses for broken or inefficient processes – processes you may not know are broken. Such conversations give you the opportunity to capture what these workers know and use it to the company's advantage.

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Knowledge transfer takes time and effort, so don't wait until a week before the retirement party to start the process. Either through mentorship, job sharing, job shadowing or other techniques, have your retiring workers share the whys behind what they do and the way they do it.

If you ask someone to document their job, it doesn't have to be terribly formal or in-depth, but it should cover the key elements. They should identify those processes that are critical to the business, including important details, such as where files are kept.

(https://www.insperity.com/blog/retiring-employees-8-tips-smooth-transition/, Turner, 2023)

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3. Redundancies

Staff reduction is often the solution when a company goes through a difficult time and needs to cut costs, or it goes through restructuring. However, this is not necessarily true. If a role is not critical to the job getting done, or if the employee does not perform well enough, this usually calls for a lay-off and replacement. Other reasons for staff reduction may be relocation, going out of business, outsourcing, introducing business tech, reducing operations or changes in role requirements.

However, routine lay-offs can intervene with employee engagement and company profitability. Therefore, it needs to happen with caution. Letting an employee go may seem like a minor change, but it can have a tremendous effect on the rest of the team, especially if the company is based on collaboration. Team members have to pick up the slack of the employee that left. This may bring about a decrease in productivity and motivation.

On the other hand, staff reduction could be a powerful tool for the success of your business. Apart from the obvious benefits like cutting down on costs and maximizing efficiency of resources, headcount reduction can also lead to increasing initiative, teamwork and morale in your organization, if handled properly.

Reducing the size of your workforce is never easy. After all, you need to pick from employees you've recruited for your company because they had talent and seemed like a good fit. However, if you are consistent with your organizational practices and aim for long-term staff reduction solutions, you will manage to sustain team productivity and success. Here are some top ways to do staff reduction in a gradual, optimized way:

Rightsizing

Rightsizing is a term that describes strategically transforming the size of your workforce according to the resources you have and targets you need to meet. In other words, it's about keeping just as many employees as you need to keep the ball rolling. Rightsizing is not only about the number of staff members needed in your team, but also about the right skills to get the job done.

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Mind you, rightsizing should not be confused with downsizing. The latter is about permanently reducing manpower without decreasing the workload. On the contrary, rightsizing is an ongoing process of tailoring the team size to the workload.

In addition, rightsizing is not an approach to fix problems like cost reduction quickly. Rather, it is a gradual, ongoing process that involves constantly monitoring performance of team members. The easiest way to do so is with a BPM software for HR managers. This solution gives you visibility into all roles within the company and each employee's report of met and missed deadlines.

Freeze Pay Rates

Another strategy for handling staff reduction before it is critical is to freeze salaries and benefits. Your top performers may not support your decision. However, if you explain the current situation, they would be more likely to stay. Bear in mind that team members who are less experienced in the role or just do not invest enough effort may lose motivation to improve.

In order to avoid negative results, make a promise to review this matter on a regular basis and give updates on changes. Keep the discussion about pay, perks and work hours open. This way, you will make sure you have a realistic look at how your decision affects your workforce. In addition, you can spot opportunities to help pro-active staff members grow within the company. There are different ways to make up for a pay freeze and still reward good, dedicated employees. These include work-life initiatives, incentive schemes, recognition perks. Examples are a personal parking spot, access to career development resources, branded gifts etc. as well as inclusion in company discussions.

Hiring Freeze

Hiring freeze is a quick way to reduce staff in your company. Basically, it refers to a halt in recruitment for non-essential positions. During the pandemic situation and even after, a lot of companies work remotely. Hence, roles around operations, research, development and events have become less necessary. However, you can continue hiring for positions that require specific skills and will generate profit from the very start.

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This method has its benefits. First, a hiring freeze doesn't evoke so much negativity as layoffs and furloughs. Second, this staff reduction strategy doesn't hurt your employer brand in a way that other harsh methods do.

Staff reduction via hiring freeze is a better alternative to redundancies and furloughs as it is a long-term strategy. Of course, it needs reviews and updates from time to time. However, if you implement it well into your organizational policy, you can avoid anxiety and rumors within your team.

In addition, hiring freeze calls for a reassessment of recruitment practices and looking for other ways to complete all projects with the team available. Work with the people you already have and who are familiar with the company core values and culture. Think of how you can combine different roles and delegate tasks accordingly. This way, everyone is up-to-date with what the required results are.

(https://saasbpm.com/strategic-planning-staff-reduction/, SAAS BPM, 2022)

Step 1: Check if redundancies are necessary

Redundancy is usually a type of dismissal when a role is no longer needed. You should only consider making redundancies if part or all of the organisation is:

- closing, or has already closed;
- changing the types or number of roles needed to do certain work;
- changing location.

If you have concerns about an employee's conduct or performance, you need to follow a disciplinary or capability procedure.

When considering making redundancies, your first step should be to check:

- why you think redundancies are necessary;
- what issues you're trying to solve
- other options that might be available

Look at other options

Before starting a redundancy process, you should consider all options to reduce or even avoid redundancies.

For example, you could see if you can:

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- offer voluntary redundancy;
- change working hours;
- move employees into other roles;
- let go of temporary or contract workers;
- limit or stop overtime;
- not hire any new employees.

Offer voluntary redundancy

You can give employees the option to put themselves forward for voluntary redundancy.

It's your decision whether or not to accept the volunteers, taking into account the wider needs of the organisation. It's a good idea to make this clear to employees early on.

Avoid discrimination

If you do give the option of voluntary redundancy, you:

- should offer it as widely as possible, not necessarily just to those at risk of redundancy;
- should not pressure or single anyone out;
- must select employees in a fair way.

This can avoid the risk of indirect discrimination. For example, it could be age discrimination if you only select older employees.

Change working hours

There could be ways for you to save costs by having staff work more flexibly. You should always talk with employees and try to reach an agreement first.

For example, you could offer employees:

- homeworking
- job shares
- to work fewer hours

If it's written in their employment contracts, you can tell employees that they need to:

- stop working for a while (known as a 'temporary lay-off')
- work fewer hours (known as 'short-time' working)

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Lay-offs and short-time working are temporary solutions and must not be a permanent change to agreed working hours.

If you're changing what's written in employment contracts:

- You usually need to agree changes to employment contracts with employees.
- You can talk with them to try to agree. They do not have to accept.
- There are additional considerations when changing an employment contract after a TUPE transfer.

Move employees into other parts of the organisation

You should see if you can move employees into different areas of your organisation ('redeploy') to avoid redundancies. For example, by looking at:

- what transferable skills staff have;
- if there are other vacant or new roles in the organisation that require those skills.

If you do decide redundancies are necessary, you should check if you have:

- a redundancy policy you must follow;
- a collective agreement with a trade union with details of what you must do.

You must follow a fair redundancy process and this must include:

- consulting staff;
- collectively consulting staff if more than 20 are at risk of redundancy;
- You might not always be able to avoid redundancies, but by working with employees you could find ways to save jobs and better understand how to plan for the future.

Make a redundancy plan

You should make a redundancy plan that you'll share with all staff and put into action. It can help you follow a fair process and avoid the risk of legal claims. It's a good idea to work with any trade union or employee representatives when making a plan.

The redundancy plan should include:

- all the options you've considered before deciding on redundancies;
- the number of redundancies you're considering;
- keeping staff informed and supported throughout the process;
- consulting all employees affected, including those off work, for example on maternity or sick leave;

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- timeframes, for example to leave enough time for consultation;
- agreeing on fair selection criteria;
- whether redundancy pay and notice periods are statutory or contractual;
- an appeals process for if an employee thinks the redundancy process or their selection was unfair.

Support and train managers

An organisation with managers will need them to help handle the redundancy situation and keep staff informed.

You should make sure your managers:

- know why redundancies are being made;
- understand in detail the redundancy plan;
- are comfortable and confident to talk and work together with staff about the redundancy process;
- know how to raise issues or ideas with those leading the redundancy process;
- have training to be confident in carrying out any duties;
- know where to go for further support.

By involving managers from the start and keeping them informed and updated throughout, they'll be able to:

- come up with ideas that help ensure a smooth process and reduce or avoid redundancies;
- effectively talk with staff about the redundancy process and plans;
- make redundancy dismissals and give notice of when staff selected for redundancy will leave;
- help restructure in the best possible way.

As soon as possible, you should tell ('inform') your employees that you're considering making redundancies. You should hold a meeting with all employees affected, not just those at risk of redundancy, where you explain:

- the risk of redundancy and the reason why it may be necessary;

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- how many redundancies you're considering;
- what happens next, including how everyone will be consulted;
- You should encourage employees to ask questions. The meeting can be held online if people are working remotely.

For employees who are at risk of redundancy, you should also confirm in writing:

- that they're at risk of redundancy;
- whether they have other options, such as voluntary redundancy or redeployment;
- the outline of your consultation plans.

You should continue to keep employees informed throughout the redundancy process. You must consult with your employees before finalising any redundancies.

If you do not hold genuine and meaningful consultation before making redundancies, employees could claim to an employment tribunal for unfair dismissal.

Consultation is when you talk and listen to affected employees. In collective consultation you also consult with their representatives.

You should use consultation to try and agree actions wherever possible, for example the selection criteria.

During consultation, you should discuss:

- the changes that are needed, what you plan to do, and why;
- ways to avoid or make fewer redundancies;
- the skills and experience needed for the future;
- the criteria for selecting employees for redundancy;
- any concerns employees may have;
- how you can support and arrange time off for affected employees, for example to update their CVs and get training.

Employees will often have good ideas that may help to avoid redundancies. You do not have to agree to their suggestions, but it's important to seriously consider any ideas that could reduce redundancies, otherwise employees could claim the redundancy process has been unfair.

Check if you need to hold collective consultation

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If you're planning to make 20 or more redundancies, you should check if you need to hold 'collective consultation'.

You might have a workplace policy or agreement that says you must collectively consult a trade union or employee representatives, no matter how many redundancies you're planning.

It can still be good practice to collectively consult even if you do not have to. It can help:

- you to fully be involved with employees about ways to achieve the change that's needed;
- reduce negative effects on employees;
- the process be fairer and quicker;
- employees feel that any decisions are fair, and so reduce risks of legal claims.

You should consider allowing employees to be accompanied at any one-to-one meeting. A companion can be helpful as they can:

- give the employee support;
- be a neutral person to observe;
- speak for the employee if needed.

You should make sure any managers who lead consultation meetings:

- have had training in managing the meeting appropriately;
- are fully informed about the redundancy plans and process;
- can present the plan for the redundancy process clearly;
- can provide everyone with a questions and answers document;
- Use a template letter inviting an employee to a consultation meeting.

How long consultation lasts

There are no rules for how long individual consultation should last. But you should check if you have a policy or agreement in place that does have rules.

You do not need to reach an agreement for consultation to end. Consultation should be meaningful and you should be able to show you have genuinely considered any suggestions or points made by each employee, even if you do not accept them.

You need to select employees for redundancy in a fair way.

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But if you need to reduce the number of employees in the organisation or team, you'll need to set up selection criteria and make a list of roles to be considered for redundancy (a 'selection pool'). Selection pools help make sure employees are selected for redundancy in a fair way.

Where a number of different roles are at risk of redundancy, you may need to have more than one selection pool.

You should include in each pool all roles that are the same or similar.

You should also consider including roles that have similar skills. For example, all marketing roles are in a selection pool. You could also include roles from the press and communications team if the skills are similar to those needed for marketing.

When setting up a selection pool, you should check and follow any:

- agreements you may have with a recognised trade union;
- existing redundancy policy;
- If there is no existing policy or agreement, you should consider consulting any recognised trade union on how the pool should be set up.

Using selection criteria

You should have included selection criteria in your consultation.

Criteria should be as 'objective' and 'measurable' as possible. This means it should be fair, be based on facts that can be measured and not be affected by personal opinions.

You must use the same way of scoring criteria for all employees in the pool.

Agreed selection criteria scoring is useful as:

- it can be applied to everyone (although you might need to use different scoring for different groups of employees – for example, the engineering team might have a different scoring from the sales team);
- it can be easily explained to everyone;
- employees feel they're being treated fairly;
- it gives a clear, structured and consistent system for managing selection issues;
- it can be used at employment tribunals to defend an employer's decision.

Examples of selection criteria could include:

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- standard of work or performance;
- skills, qualifications or experience;
- attendance record, which must be accurate and not include absences relating to disability, pregnancy or maternity;
- disciplinary record.

How to score employees

You can have different levels of points according to the importance of each criteria ('weighting') for your organisation's needs.

For example, if it's agreed that attendance record is less important than performance, you can allow fewer points for this. So you could score attendance out of 5 points and performance out of 10.

You should have written evidence against each of the criteria.

Example scoring criteria and points:

- Work performance:
- outstanding – consistently exceeds company standard 15
- exceeds objectives of the role 12
- meets all objectives of the role 9
- meets some objectives of the role 6
- fails to meet objectives of the role 3

- Skills and competence:
- fully competent, multi-skilled, supports others on regular basis 15
- fully competent in current role 12
- competent in most aspects of current role, requires some supervision 9
- some competence in role, requires regular supervision and guidance 6
- cannot function without close support or supervision 3

- Disciplinary record:
- no record of disciplinary action 5
- record of informal disciplinary action 4

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- verbal warning current 3

- written warning current 2

- final written warning current 1

− Attendance record:

- no recorded absence 5

- some absence but below average for selection pool (or workplace) 4

- attendance in line with workplace (or selection pool) average 3

- absence level above average for selection pool (or workplace) 2

- high and unacceptable level of absence 1

Avoid discrimination

It's against discrimination law to select employees based on:

- age;

- disability;

- gender reassignment;

- marriage and civil partnership;

- pregnancy and maternity – see the Acas guide to redundancy for employees who are pregnant or on maternity leave;

- race;

- religion or belief;

- sex;

- sexual orientation;

- family related leave – for example parental, paternity or adoption leave;

- their role as an employee or trade union representative;

- membership of a trade union;

- part-time or fixed-term contract;

- working time regulations – for example if they've raised concerns about holiday entitlement or rest breaks;

- concerns they've raised about not being paid the National Minimum Wage;

- concerns they've raised about whistleblowing.

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You can only give an employee notice of redundancy once you've finished consulting everyone and gone through the selection process. You should meet with each employee who's been at risk of redundancy. It's best to do this face to face, but if this is not possible, you should talk with them on a call. You should allow them to be accompanied at the meeting. For those selected for redundancy, you should also put the details of their redundancy in writing. This can be by letter or email.

You should include:

- how they scored in the selection criteria and why they received that score;
- their notice period and leaving date;
- how much redundancy pay they'll get and how you calculated it;
- any other pay due to them, for example holiday pay;
- when and how you'll pay them;
- how they can appeal the redundancy decision.

Employees may want to know how others have been scored. You should not share other employees' scores. You could show how everyone scored overall, as long as you can keep it anonymous.

It's good practice to offer employees the chance to appeal if they feel they were selected unfairly for redundancy.

This should be set out in your redundancy plan. It might also be written in contracts or your redundancy policy.

An appeals process can help to:

- give you early warning the redundancy selection process might have been unfair and the chance to correct it;
- deal with and resolve an employee's complaint, avoiding an employment tribunal claim;
- show a tribunal that you have followed a fair process.

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If an employee is successful in an appeal, it's likely to mean another employee will have to be made redundant in their place. This could be a very difficult situation, especially if the employee was previously told they were safe from redundancy. You should:

- prepare for how to handle the situation sensitively with the employees affected;
- keep communication clear and open;
- offer support;

How an employee can appeal

If an employee thinks they've been unfairly selected or there was a problem in the redundancy process, you should give them the chance to appeal within a reasonable timescale of receiving their redundancy notice. For example, 5 days could be reasonable.

The employee should tell you in writing the reasons for their appeal. When you receive an appeal, you should send a meeting invitation to the employee as soon as possible. It's a good idea to allow them to be accompanied at the meeting by a work colleague or union representative.

Where possible, arrange for a senior staff member who has not been involved in the redundancy decision-making to lead the appeal meeting. In organisations where this is not possible, the person leading the appeal meeting should be as impartial as possible.

You could also consider using an independent consultant to help when making a decision.

Making an appeal decision

You should consider the appeal without unreasonable delay and make a decision to either refuse or agree to ('uphold') the appeal. You should put your decision in writing to the employee.

If you uphold the appeal

If it's clear the employee was selected unfairly, but you still need to make a role redundant, you will need to handle the situation very carefully. It could mean the end of employment for another employee who had been told their job is safe.

It's important to:

- communicate clearly and openly with your staff;

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- correct any issues with the process;
- make sure you carry out a fair selection process.

If you have found there were serious issues, you may need to go through the whole redundancy process again.

If you uphold an appeal and the employee has not yet ended their redundancy notice period, the employment contract should continue as though the employee had not been selected for redundancy in the first place.

If you uphold an appeal and the employee has already ended their redundancy notice period, you should put them back in a role ('reinstate' them). Their length of service ('period of continuous employment') will apply from when you first employed them. You may need to pay any arrears of wages between the end of the notice period and the time you reinstate them.

If you have made a redundancy payment to your employee and you later uphold an appeal, you should make it clear that upholding the appeal means they'll need to return the payment. If you decide to refuse the appeal, the employee's redundancy dismissal, pay and notice continues as before. You must try and move employees selected for redundancy into other jobs within your organisation instead (offer 'suitable alternative employment'). You must identify any available jobs in your organisation and talk to the affected employees to see if they agree they're suitable. If a role is suitable, you should offer it instead of redundancy. If you do not, the employee could make a claim to an employment tribunal for unfair dismissal.

They should not have to apply for the role. But if more than one employee is interested in the same role, you must offer the role to any employees on maternity leave or Shared Parental Leave first. For all other employees, you must follow a fair process, for example holding interviews for the role.

When you offer an employee another role, it must be:
- put in writing;
- offered before their current contract ends;
- a different role to the one they're currently doing – you'll need to explain how it's different;

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- start within 4 weeks of their current role ending.

Employees have the right to a 4-week trial period if they accept a new role. If they need more time to train for the role, you can agree to a longer trial period. It must be agreed in writing and have a clear end date. The trial period should start after they've worked their notice period and their previous contract has ended. This avoids any confusion or disputes over dates if the trial does not work out. It's a good idea to set out the dates for the trial in writing. If an employee refuses your offer for a suitable alternative role, or turns it down after the trial period, they need to have a valid reason why it's not suitable.

Examples of reasons could include:
- the job is on lower pay;
- health issues stop them from doing the job;
- they have difficulty getting there, for example because of a longer journey, higher cost or lack of public transport;
- it would cause disruption to their family life.

If the employee has a valid reason to turn down the job, they'll be entitled to redundancy pay. But if the employee does not have a valid reason for turning down the job, you could refuse to pay their redundancy pay. You'll need to be able to prove the employee's decision was unreasonable if they make a claim to an employment tribunal.

You should think about how to support:
- employees at risk of redundancy;
- managers who are breaking the news;
- the people leading the consultation;
- employee representatives;
- those staying on.

You can support staff by providing:
- counselling;
- additional face-to-face meetings;

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- help getting financial advice;
- clear plans for the future;
- time off for those selected for redundancy to look for new jobs or get training.

It's often forgotten that those staying on experience stress from seeing colleagues and friends being made redundant. They'll also be part of a changing workplace and might feel uncertain about what the work and their roles will look like in future.

Help staff find another job or training

You must allow employees you've made redundant a reasonable amount of time off during their notice period to look for another job or to do training. This applies if the employee has worked for you for 2 full years or more (including the notice period).

([Support your staff and plan for the future: Managing staff redundancies: step by step - Acas](#), Acas, 2023)

Needless to say that organizations want to build and retain an efficient resource pool. The resources' skill set and hard work decide the outcome of your project's success. Thus, keeping them for the long haul is vital to ensure profitability and business success.

However, despite following the best resource management practices, organizations often face challenges in cracking the ideal resource retention strategy.

Employee expectations go beyond a mere paycheck today. They prefer a rewarding work environment that will provide them with opportunities to grow and excel in their career.

The onus is on decision-makers facilitating an employee-centric culture while considering the firm's long-term objectives.

There are some beneficial tips you can leverage when formulating a meaningful employee retention strategy and nurturing a positive work environment. But first, let's understand the term   employee   turnover.

➢ *What is employee turnover?*

Employee turnover refers to the rate at which employees leave an organization and are replaced by new hires. It is a measure of the number or percentage of employees who exit a company within a given period, usually on an annual basis. A high turnover rate can indicate issues within

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the company, like dissatisfaction or poor management practices, while a low turnover rate can suggest a balanced and content workforce.

Turnover can be voluntary and involuntary. Voluntary turnover is when the worker chooses to leave the company due to better job opportunities, burnout, disengagement, workplace conflicts, etc. Involuntary turnover is when the organization decides to terminate the employee due to performance issues, behavioral issues, etc.

Staff turnover can be expensive for companies. Hence, calculating turnover allows organizations to understand the financial impact of losing and replacing employees. In addition, it can help firms find gaps and opportunities for improvement, leading to better company productivity and growth.

> *How to calculate turnover rates?*

The turnover rate can be calculated monthly, quarterly or yearly. To calculate the staff turnover rate, divide the total number of employees leaving the company during the specified period by the average number of employees that work within the selected time. Multiply that number by 100.

For instance, the total number of employees working in an organization is 150 and 25 employees quit the firm in a month. The turnover rate will be approximately 16.7 per cent.

The equation is:

Total number of employees leaving the firm / Total number of employees working in the firm *100

That is 25/150*100 = 16.7%.

Knowing what employee turnover is and how to calculate it, let's understand the factors leading to a turnover.

> *What are the main causes of employee turnover?*

High turnover rates can be an unfavorable condition for organizations. High employee turnover can be attributed to various reasons:

A. Lack of purpose

According to LinkedIn, companies with a purposeful mission see 49% lower attrition.

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Employees are motivated to work in companies that have purposeful missions. Organizations with a strong culture and clear goals and objectives can retain employees better. The inspiring company culture encourages employees to perform better and make their experience at work more purposeful.

B. Absence of career growth and development

When employees do not see a future in their organization, there are chances of high turnover rates. Without clear pathways for development, employees may seek opportunities elsewhere. Workers may leave the organization when they do not offer skill-based training, coaching, mentoring, career development programs, or leadership development programs.

C. Poor management and leadership

"Employees don't leave the organization; they leave the managers." This saying holds in companies where unsupportive managers can contribute to employee turnover. Incompetent managers can significantly cause employee stress that can adversely affect their performance. Negative relationships with a supervisor are common reasons workers seek new employment.

D. Work-life imbalance

According to Flexjobs, 82 % of respondents say they would be more loyal to their employers if they had flexible work options.

Employees who persistently experience high-stress levels, long working hours, or an imbalance between work and personal life are likely to leave. Improper work-life balance can cause burnout and job dissatisfaction and impact overall well-being.

E. Excessive workload and employee burnout

When employees are overburdened with work, it leads to burnout which is one of the main reasons to quit the organization. At times, increased workloads are not entirely avoidable. For instance, employees might need to put in more work hours during peak seasons or in larger projects with strict deadlines. However, this may lead to dissatisfaction, stress and burnout.

F. Misalignment in organizational culture and values

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If employees feel that their values or beliefs do not align with the company's culture, they may choose to leave. A toxic or unsupportive work environment, lack of inclusion and diversity, or a mismatch between an employee's and company's values can all contribute to turnover.

G. Lack of proper recognition

Employees who feel their contributions are unrecognized or appreciated may become disengaged and seek opportunities elsewhere. A lack of reward and recognition programs or a failure to provide timely feedback can contribute to employee dissatisfaction.

H. Poor compensation

When employees are dissatisfied with their salaries or hikes, it may result in high attrition. Employees often consider compensation a significant factor in their decision to stay or leave a company. Employees who believe they are not adequately compensated for their skills, responsibilities, or market value may seek opportunities elsewhere that offer better pay and benefits.

These are some of the major factors that contribute to high employee turnover. Let's dive deep to understand the consequences of high employee turnover.

> ➤ *What is the impact of high employee turnover rate?*

High employee turnover lowers the overall efficiency and profitability of the organization. Here are some expected consequences associated with high turnover rates:

A. Increases overall costs

Employees resigning costs a considerable amount to the company. The cost involved in training, educating and providing specific licenses requires money. Moreover, frequently replacing departing employees can be costly as companies must invest in advertising job openings, conducting interviews, and onboarding new hires. Training costs are also significant, as new employees need time and resources to speed up their learning process. High turnover rates can lead to a continuous cycle of recruitment and training, straining the company's resources.

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B. Decreases workplace morale

Labour turnover may negatively impact employee morale. This can arise when employees are overburdened with work due to a lack of a trained workforce causing stress and disengagement. Additionally, new hires may experience low morale as they struggle to learn their duties and responsibilities. Constantly having such an environment will make it difficult for organizations to retain good-quality employees.

C. Lowers employee productivity

When employees leave the organization, existing workers experience a loss of productivity as they spend time training new hires to get attuned to the new work. Lower productivity and sub-par work quality will affect the business's day-to-day operations. High turnover rates can lower overall output and negatively affect the company's performance.

D. Loss of institutional knowledge

Experienced employees who quit the organization take their knowledge, skills, and experience with them. This loss of institutional knowledge can harm the organization, especially if they hold critical or specialized roles. New employees may take time to gain the same level of expertise, impacting decision-making, problem-solving, and overall organizational effectiveness.

E. Disruption in team dynamics

Companies with high turnover rates can disrupt team dynamics and working relationships. Cohesion within teams may be affected as members constantly adjust to new colleagues. Continual turnover can lead to decreased morale, increased stress, and a lack of stability, negatively impacting teamwork and collaboration.

F. Impedes company reputation

High-turnover rates can damage a company's reputation, both internally and externally. Employees may perceive a high turnover rate as a sign of instability, poor management, or an undesirable work environment. Externally, potential candidates may restrain from applying to the company due to its reputation. This will ultimately impact the organization's brand.

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Hence, it is imperative to proactively address the challenges organisations face due to high turnover rates. Now, let's investigate the importance of reducing employee turnover.

> ➤ *Why must organizations reduce employee turnover rates?*

Employees are critical to the success of an organization. Hence, companies must ensure that their employees are cared for to reduce staff turnover. Improving employee retention can help organizations save on recruitment, onboarding, training, and lost productivity costs. Retaining talented employees and minimizing the need for frequent replacements can lead to cost savings and improved financial performance.

Furthermore, when employees stay longer, organizations can retain this knowledge, ensuring continuity, smoother operations, and improved decision-making. In addition, when workers are with the company longer, they become more familiar with their roles, processes, and organizational culture. This helps them work more efficiently, improving their performance and productivity.

Moreover, companies with low turnover rates can nurture a more positive work environment, boost employee morale, and increase engagement. Engaged employees are more likely to be motivated, productive, and committed to the company's success. By reducing turnover, organizations can increase their chances of retaining key talent. Additionally, organizations valuing and retaining their employees tend to have a stronger employer brand.

Lastly, reducing employee turnover is essential for organizations to create a positive work environment, retain top talent, improve financial performance, and achieve long-term success. These are some potential benefits companies can derive by reducing turnover rates. Let's know some of the best practices to lower employee turnover.

> ➤ *10 effective strategies to reduce employee turnover*

To retain top talent, businesses must take appropriate measures to reduce staff turnover. Organizations must implement specific methods to improve employee retention besides providing career growth opportunities, work-life balance, compensation benefits, and more.

Listed below are a few strategies:

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A. Hire the right resources

Hiring a resource should never be a spur-of-the-moment decision. It requires meticulous planning and preparation to ensure the right fit for successful project implementation.

An efficient capacity planning solution identifies the skill gap and helps employers recruit the right talent ahead of time. It provides foresight into the capacity and demand gap and enables you to take suitable measures to mitigate shortages or excesses of resources. Managers can stay forewarned and proactively implement the resourcing treatments such as training, hiring, adjusting timelines, actively marketing excess capacity etc., to bridge this gap.

It eliminates last-minute hiring costs and maintains a quality resource pool to avoid future project bottlenecks.

B. Allocate the right resource to the right job

If managers allocate a task to a resource that does not align with their skill set, it will disengage them and reduce their productivity. If the resources are underqualified, they can feel frustrated, burnout and delay delivery. If the resources are overqualified, they might lose interest and feel their potential is not getting realized. In either case, the chances of turnover are high. Therefore, allocating the right resource to the right job is important to ensure employee and client satisfaction.

Managers must implement an intuitive resource scheduling tool to ensure successful resource allocation across the enterprise. It provides a unified view of their workforce's skills and schedules and allows you to book suitable projects. When your employees feel their competencies are deployed in the right place, they will feel motivated and continue with your organization.

C. Optimize workforce utilization

Deloitte survey reveals that "42% of employees have left their job due to burnout". Overutilization can put employees under immense pressure and can contribute to employee attrition. At the same time, underutilization can lead to disengagement and low morale. Thus, optimizing employees' utilization is critical to leverage and retain their skills at maximum potential.

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Managers must remember that effective utilization is not just about working too many hours. Productivity must go hand in hand with utilization. They must therefore ascertain that employees' maximum time is booked for strategic/billable work. Spending time on mundane admin tasks or BAU activities will neither put their skill set to the right use nor generate profits for the firm.

Employers can make adequate use of dashboards to measure and get a comprehensive view of employee utilization levels. Employee satisfaction and enhanced productivity are the key indicators of effective utilization.

D. Minimize bench time

Once a project gets over and if resources are not scheduled for another project, they will spend bench time until they are allocated a new project. Extended bench time leads to significant issues such as lesser ROI as the resources are not generating revenue for the organization. It can lead to planned attrition which affects a firm's reputation, as well as unplanned attrition when employees begin to look for other job opportunities for growth and development.

For effective bench management and to reduce unplanned attrition, managers can employ an effective resource management tool to predict resources that will end up on the bench in advance. Project vacancy reports can be used to quickly assign them to billable or strategic work before they land on the bench. If their skills are unsuitable for project vacancies, on-the-job training or reskilling can be used to make them billable. Moreover, advanced planning on pipeline projects will help you allocate them better.

E. Organize effective team-building activities

Facilitating strong bonds among colleagues is proven to improve the efficacy of employees and enhance employee engagement. Companies that highly emphasise employee retention must highly value interpersonal relationships. This is because coherent teams result in enhanced communication, lower stress levels, and greater output.

According to Goremotely, "extremely connected teams demonstrate a 21% increase in profitability". Moreover, employees who feel they have made meaningful friendships at the workplace are more likely to stick around.

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Managers should therefore invest in team-building activities to promote a cohesive work culture. One example is the buddy system- when new employees join, they are assigned a mentor (buddy) from the same team who hand-holds in following the protocols. The Buddy system ensures the new employee is well integrated into the team and company. Other ways to empower the team include organizing monthly team lunches, weekly informal meetings, etc.

F. Offer flexible work schedules

In the post-COVID-19 pandemic era, working from home has become the new normal. A healthy work-life balance is an essential aspect of job satisfaction. Flexible work hours may be a luxury to specific businesses, but adjusting the hours and planning response times gives employees better focus and results in higher efficiency. Studies have shown that flexible-work schedules can enhance the well-being of employees.

Furthermore, when managers consider team members' skills and interests while assigning work, it enhances employee engagement and productivity. When you consider your resource's interests, they feel valued, motivating them to perform better.

G. Plan training & development programs

Providing training and development programs displays the commitment given by the company. A resource manager can help the resources by projecting a career path, thereby giving a purpose and setting direction. Managers can implement an Individual Development Plan or IDP to help employees reach short and long-term career goals and improve current job performance. Training facilitates self-growth and will allow the resources to contribute better. They can take up more responsibility in the team or even be eligible for higher roles.

Managers can track the project's progress and gauge the employee's key strengths and weaknesses based on how they perform the tasks. Based on this, they can motivate them to learn new skills and practice on the job. When the workforce feels that their goals and objectives are being taken care of, they are likely to stay with the firm for the long haul.

H. Identify key performers

Every business needs a set of worker bees who are diligent in their work. Employees are expected to show up promptly on time, get the job done, and keep the flow of work going. To

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effectively grow your company, you need to nurture and reward the top performers for keeping up the employee morale of those who put a little extra into their work.

Employees who go beyond their job description and exhibit leadership deserve a pat on the back with rewards and recognition.

Study reveals that identifying key performers heightens productivity and strategically improves the business. If it gets rewarded, it is highly likely to get repeated!

I. Share regular feedback

Regularly sharing constructive feedback with employees enables them to see themselves from the employer's perspective. You can acknowledge their strengths and also address the areas of improvement. When they know their leaders are promoting individual development, it will boost their motivation levels and eventually increase retention.

While giving feedback is necessary to help your workforce grow, it is also important to take feedback from them. Employee feedback through surveys and one-on-one sessions is instrumental in sharing their experience and expectations and makes them feel valued. If something is not aligning with their goals, you can work on it as a manager and provide them with more opportunities. Expressing gratitude should also be a part of feedback sessions to acknowledge their work and efforts.

J. Convey the firm's goal

Employees must share a common goal and know what they are heading towards. Goal setting facilitates staff across the organization to make decisions considering long-term and short-term targets. This process of aligning the company's goals with employees' tasks helps them to achieve tangible results.

Moreover, employees are aware of how their work is helping the organization reach milestones. The company's goal or vision should inspire all employees to share and inculcate in their daily duties. Because if your resources do not have a set goal, they will show disengagement at the workplace, gradually leading to an unexpected turnover.

For Example, the food giant McDonald's vision is "To be the best quick service restaurant experience. Being the best means providing outstanding quality, service cleanliness, and value

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to make every restaurant customer smile." They define their goals to every employee so distinctly as if to define a roadmap to success.

(https://www.saviom.com/blog/effective-strategies-reduce-employee-turnover/, Kumar, 2023)

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4. Employee transfers and redistribution of responsibilities and duties related to burnout

What Is Teacher Burnout?

Teachers confront significant challenges. They must adapt curricula to a wide range of learning styles, manage shifting education policies, attend to students with special educational needs (SEN), and juggle administrative work. In addition, many of our greatest social ills show up in their classrooms. So, what happens when teachers who already contend with so much also experience unsupportive work environments?

Many experience teacher burnout, hitting their limit in dealing with their work's daily challenges. It occurs after prolonged exposure to poorly managed emotional and interpersonal job stress.

Consequences of Teacher Burnout

Over time, teacher burnout can lead to a variety of responses. The World Health Organization (WHO) describes burnout as an occupational phenomenon characterized by three main attributes:

- Exhaustion. When teachers experience burnout, they can feel depleted of energy and too exhausted to continue with their work.
- Cynicism. Teachers who have reached a state of burnout can begin to feel mentally detached from their jobs. Their feelings about the profession can turn negative and cynical.
- Inefficacy. Teacher burnout also leads to feelings of incompetence or ineffectiveness.

Causes of Teacher Burnout

Teachers confront disheartening experiences that can lead to fatigue, anxiety, and depression. Left unmanaged, these symptoms can result in teacher burnout. Some of the causes of teacher burnout include:

➢ Poor Funding

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Many districts and educational organizations lack sufficient funding for updated materials, technology, and staff. This places a huge burden on teachers, who must make do with insufficient books and supplies while managing high teacher-to-student ratios. Over time, this burden can leave teachers feeling hopeless and ill-equipped to address achievement gaps and meet students' needs.

Education leaders must advocate for better funding and, in the meantime, find ways to cut waste and manage their budgets so educational organizations are as well-stocked and staffed as possible.

➢ High Emotional Demands

In addition to educating students, teachers must care for students' emotional needs, which can be emotionally demanding. Teachers often feel the very future of a generation rests on their shoulders. If a work environment lacks the support needed to fulfill this responsibility, teachers can understandably feel overwhelmed.

Additionally, teachers frequently find themselves supporting students who have experienced trauma. For example, teachers are likely to be among the first to notice signs of child abuse in a student. As mandated reporters, the law requires teachers to inform authorities.

Such experiences and others in which teachers have no control over the tragic events in their students' home lives can prove harrowing. Ultimately, teachers can experience secondary trauma when they help students going through difficult times.

Education leaders need to provide teachers with the tools to endure the weight of the emotional demands of their role. For example, they can offer training sessions that give formal instruction on developing emotional skills such as:

- Accurate emotional recognition;
- Understanding of the causes and consequences of one's emotions;
- Comfortable expression of emotions;
- Effective regulation of emotions.

The Yale Center for Emotional Intelligence research has shown that teachers with developed emotional skills experience less burnout.

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➢ Inadequate Preparation

All too often, educational organizations put teachers in situations they are not adequately prepared to handle. For example, administrators may require educators to teach outside of their subject area, or they may assign students with learning and behavioral challenges to teachers who lack the necessary training to meet their needs. Such scenarios not only prevent students from learning but also prevent teachers from feeling accomplished, which can cause burnout.

Education leaders must ensure teachers get meaningful professional development that prepares them to deal with behavior issues, new education policies, educational technology, and other obstacles. Additionally, administrators must mindfully assign responsibilities that align with a teacher's preparation and experience.

➢ Challenging Teaching Situations

Educators face increasingly difficult teaching situations that can lead to burnout. These challenges range from policies that tie teacher evaluations to standardized exams that don't accurately reflect student learning to transitions to distance learning during the COVID-19 pandemic.

For example, with virtual learning, many teachers are bombarded with parent emails while also trying to direct students who can't navigate online learning platforms. As a result, teachers often feel obligated to work all hours of the day and night, struggling to find a healthy work-life balance. Additionally, challenging student behavior has become more severe and frequent, leaving teachers to manage difficult situations.

Education leaders need to consider how policies regarding teacher evaluations and standardized exams affect teachers and also mindfully advocate for programs that boost teacher morale. They can support teachers by setting boundaries on their behalf, such as by communicating clearly to parents what teacher work hours are and putting limits on teachers' obligations.

Finally, leaders can continue to deliver specific training that prepares teachers to respond to individual challenges as they arise.

Teacher Burnout's Disproportionate Impact on High-Poverty Educational Organizations

The National Center for Education Statistics projects school enrollment will grow 2 % by 2028. The combination of growing student populations and significant numbers of departing teachers

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has set off alarm bells for education leaders, who are now searching for ways to curb the attrition. Even more distressing, this attrition disproportionately affects disadvantaged or marginalized students.

Research has consistently shown that the highest teacher attrition rates occur in high-poverty educational organizations and schools made up largely of students of color. For example, as of 2016, Title I schools (schools where at least 35 percent of students are low-income) had turnover rates 50 percent higher than non-Title I schools. The churn and instability that teacher burnout causes intensifies the challenges marginalized students experience and can contribute to a widening achievement gap.

Signs of Teacher Burnout

Teachers often don't recognize they're on the road to burning out before they hit a threshold of no return. However, early identification of the following symptoms, which teachers may experience to varying degrees, can help education leaders implement intervention strategies at a point when they will be most effective.

➢ Constant Fatigue

Excessive workloads and emotional strain can lead to fatigue. However, in a manageable situation, this fatigue should ebb and flow. Three-day weekends and seasonal vacations can go a long way in renewing energy. Unfortunately, for overburdened teachers, fatigue can remain a constant. It can interrupt sleep, cause irritability, and even affect eating habits.

➢ Self-Doubt

Teachers may wonder about the effectiveness of a lesson or self-critique their work. This is part of the growing process and key to development. However, teachers heading for burnout may begin to question whether they are cut out for teaching altogether. They may not only doubt the strength of an individual lesson or unit but also wonder if anything they do has value.

➢ Withdrawal

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When teachers feel overwhelmed by their work, they may withdraw in several ways. For example, they may pass on social gatherings with colleagues or stop joining other teachers for lunch. They may also take mental health days more often. They may participate less in faculty and department meetings and cut back on attending optional school events after hours, such as athletic competitions and school plays.

Burnout can lead teachers to stop collaborating with their peers. Burned-out teachers often feel little inspiration to share lessons, visit their peers' classrooms, or engage in email correspondence. When they do communicate with their peers, the purpose is usually to complain about students, parents, educational organization policies, and administration. They often struggle to see anything positive about their surroundings.

➤ A Loss of Inspiration

Most teachers start their careers full of inspiration. Driven to make a difference, they believe in their ability to effect change and feel motivated to dive in. Teacher burnout quashes this inspiration and drive. Rather than feeling excited to meet new students at the beginning of the year, burned-out teachers feel dread about the things that might go wrong. Instead of feeling confident in their ability to make a difference in students' lives, they may feel like they are fighting a hopeless battle.

How to Prevent Teacher Burnout

Solving teacher burnout cannot be reduced to calls for teacher resilience or encouraging self-care. Such responses seem to suggest teachers experiencing burnout lack the grit to persevere. In reality, nothing could be further from the truth for the vast majority of teachers.

Stripping teachers of their autonomy, as well as imposing standardization and high-stakes exams, can eat away at the rewards and gratification of teaching. Education leaders must examine such trends and find ways to fortify the rewards of teaching if they hope to prevent teacher burnout.

Instead of looking at teacher burnout as an individual problem, leaders in education must shift their focus to assess the problem as a systemic, institutional, or policy-based issue.

Though teachers from high-poverty educational organizations disproportionately make up burned-out teachers, educators from high-performing educational organizations can also feel

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demoralized. They report serious frustration and confusion dealing with administrative work that often gobbles up unreasonable amounts of time that could be better spent.

For example, many teachers find themselves forced to use proprietary software bought by a district when creating lesson plans or keeping records. While sometimes helpful, such district decisions often prove burdensome, creating excessive data entry tasks and diverting teachers' attention away from more meaningful and pressing work. Such a frustration, piled on top of others, can contribute to teachers' sense of defeat.

➢ Increase Teacher Autonomy

Giving teachers more autonomy can improve job satisfaction and retention. The United Kingdom's National Foundation for Educational Research recently identified strong links between teacher autonomy and retention. Its findings suggest that involving teachers in activities that honor their independence and bolster their sense of feeling respected can significantly affect their morale and motivate them to stay.

For example, rather than imposing goals on teachers, school leaders can involve teachers in goal setting. Additionally, education leaders can consider how to give teachers more control over the curricula they select and the content they teach.

➢ Engage Teachers in the Right Conversations

While policy shifts can improve the climate teachers work in, educational organizations can make important moves to address and prevent teacher burnout. Author of Demoralized: Why Teachers Leave the Profession They Love and How They Can Stay, Doris Santoro explains the value of certain types of conversations between school leaders and teachers. Santoro recommends school leaders initiate conversations about good work, including:

- What good work looks like;
- Obstacles to achieving good work;
- What's needed for good work;
- Immediate shifts to removing obstacles to good work.

Santoro recommends school leaders get past simply following policy. Rather, she encourages district and school administrators to respond with flexibility and commit to deep engagement

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with teachers about the issues preventing them from achieving their teaching goals and feeling rewarded.

> ➢ Build Teachers' Coping Skills

Education leaders can help teachers manage their stress. With the right support and guidance, teachers can avoid the hopelessness and emotional drain that often leads to teacher burnout.

School leaders can guide teachers to modify their responses to the challenges they confront. Often, teachers enter the field full of anticipation and hope. When confronted by some of the harsh realities of teaching, they can easily fall into despair. However, with the right coping mechanisms, teachers can adjust the responses that fuel negative feelings.

Workshops, counseling, and training sessions can direct teachers to adopt strategies that allow them to reframe issues and compartmentalize difficulties. This approach can make a big difference in avoiding teacher burnout.

> ➢ Address Symptoms of Teacher Burnout

Teacher burnout does not appear overnight. This means education leaders can institute programs that address the symptoms that lead to it and hopefully prevent teachers from reaching a breaking point.

First, teachers need to trust that school administration will take steps to address their symptoms. However, if teachers see no evidence that they can expect help—or even worse, if they suspect reporting their symptoms will result in less autonomy or diminished faith in their abilities—they will have no reason to share their struggles.

Ways to successfully address symptoms that lead to burnout include:

> ➢ Implementing Responsive Policies to Teacher Burnout

Educational organizations can offer clear policies and procedures about reporting teacher burnout. They should also provide information about the care available to teachers who are struggling with it.

> ➢ Keeping Open Lines of Communication

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Teachers experiencing symptoms that lead to burnout should receive attention from administrators or people in a position to take direct action in response.

> ➢ Giving Teachers Choices About Teacher Burnout Care

Teachers know their circumstances best. School leaders should give them choices with regard to the care they receive.

> ➢ Staying Vigilant

School leaders should be on the lookout for symptoms that lead to burnout among their faculty. This awareness can allow them to intervene while there is still time to make a difference.

The effect of teacher burnout on students

When teachers lose their sense of purpose, feel burdened by fatigue, and withdraw from their work, students will likely feel the effect. Not surprisingly, research indicates teacher burnout negatively impacts students.

First, teacher burnout and attrition go hand in hand. According to the National Education Association, the loss of a teacher during the school year is like losing up to 72 instructional days—almost half the school year. This experience causes students to fall behind and significantly disrupts learning.

Several studies have found that teacher turnover does not solely impact the individual students who lose their teachers. Research has repeatedly shown that high turnover affects the achievement of all students in an educational organization.

Even when teachers experiencing burnout stay on, students pay a price. Teachers overwhelmed by stress use less effective teacher strategies. This affects the clarity of their instruction and classroom management. It also results in less stimulating classroom environments.

A study in the Journal of Educational Psychology found that teachers experiencing burnout at the beginning of the school year had notably worse classroom management by the spring than other teachers. Their classrooms also suffered from significant student disruptions.

A study from the University of British Columbia also found that the students of teachers reporting burnout had elevated levels of stress hormones, suggesting that teachers inadvertently pass their stress on to students.

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(https://soeonline.american.edu/blog/teacher-burnout/, School of Education Online Programs, 2021)

Right to Reorganize Duties

Assigning new duties within a bargaining unit or reorganizing the workplace within that bargaining unit falls under the employer's residual management rights. No management right is more fundamental than the right for employers to organize and direct their workforce and, more specifically, to assign work to employees. Management has the ability to reorganize its workforce subject to express collective agreement language to the contrary and as long as it does not act in bad faith, unreasonably or contrary to general law.

Employers may re-distribute the duties of laid-off workers to other workers, including new workers in newly created positions in different classifications.

Consequence of Reorganizing

Although management has the general ability to direct its workforce, there may be consequences for doing so, including the risk of a "classification grievance". This is where a union alleges that the worker now belongs to a higher classification and should be paid at a higher salary grid. If successful, an employer could be responsible for the difference in pay between the employees former (inaccurate) classification and the new one.

Generally speaking, a union will be successful in a reclassification grievance if:

- The worker performs significant job duties/functions of the higher classification for most of the time;
- The job duties from the higher classification are not part of the existing classification; and
- The work performed by the worker make the higher classification the best fit based upon the "central core functions" of both the higher classification and the lower classification (Even though there may be overlapping functions, one classification will be a better description);
- An overlap in duties does not allow a union to argue that the more advantageous job description applies. Rather, the core duties performed for the majority of the time must

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clearly indicate the classification sought by the union since the onus is on them; they must show not only that s/he was required to work outside the classification but that the duties were fully within the scope of that higher classification and not merely an overlap in functions.

Tips and Takeaways

Employers facing reduced workforces who wish to redistribute job duties are best guided by the following:

- Maintain open communication with the Union and the affected workers;
- Have a sound rationale behind the reorganization;
- Work within collective agreement limitations;
- Be cognizant that while seniority and wage clauses may not prevent the reorganization, the reorganization may trigger such clauses; and
- Contemplate negotiating a Letter of Understanding with the union to address the ability of having workers perform work across different classifications during the pandemic at a specific rate of pay.

Employers may require a unionized worker to do work outside his or her bargaining unit and form part of another bargaining unit.

Employers may find that in the reorganization of their workforce, some workers may have to take on duties normally assigned to other bargaining units. This is known as a "transfer of duties". The general principle is that an employer has the power to determine how he/she operates its business. While work protection clauses can impose a restriction on the employer's bona fide exercise of its discretion, explicit collective agreement language is required to do this. *Transfer of duties* between bargaining units, or to employees outside the unit, can run against an implied restriction or a bargaining unit work protection clause. Generally, the employer's ability to assign work outside a bargaining unit is prohibited if, for example, it results in a lay off or reduction in hours of bargaining unit members. In assessing whether there is a violation, arbitrators will implement the "type and volume approach" to the transfer of duties. This approach looks at which duties and how much of them have been reassigned, and whether the new duties occupy a large portion of the duties of the individuals outside the bargaining unit.

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There may be an implied restriction that impacts management's transfer of duties that exclusively belong to the bargaining unit to persons that are excluded from the bargaining unit. To trigger the implied restriction rule, the amount of bargaining unit work assigned to individuals outside it must be close to an amount that would occupy an employee for a full shift.

A breach of the implied restriction rule arises when the excluded persons are assigned bargaining unit work to the extent they spend close to the majority of their work day performing that work. As a result, factors employers are to consider when reassigning duties include:

- the quantity of work, such as the time devoted to the transferred work by those outside the unit;
- the quality of work;
- any overlap of duties.

Given that the implied restriction rule protects work that exclusively belongs to the bargaining unit, overlapping duties performed by both the bargaining unit and those outside of it are not protected. Additionally, there is case law which holds that even where there is no express restriction on the assignment of work outside of the bargaining unit, such a restriction can be implied from the recognition, exclusion, seniority, job posting, layoff, recall and job classification provisions of a collective agreement.

In sum:

a) If the collective agreement provides that bargaining work cannot be assigned outside of the unit then an employer breaches the agreement by assigning work to others;

b) If the collective agreement does not prevent assigning work to other workers, the non-bargaining unit member is allowed to perform bargaining unit work so long as the bargaining unit work is not done to the extent that the non-bargaining unit member brings themselves into the bargaining unit.

The consequences of inappropriately assigning bargaining unit work to non-bargaining unit members can be significant. The union can grieve the loss of wages, benefits and union dues that are owing to the particular employees who lost the opportunity to perform the work, and in the case particular workers cannot be identified, the union itself can claim those damages. This effectively results in the employer paying twice – once to the non-bargaining unit member who

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performed the work, and a second time to the employees (or union) who ought to have provided the work.

Tips and Takeaways

While employers generally retain the power to transfer duties even where this represents the redistribution of duties from bargaining units that have been laid off or reduced, they should be mindful of the following:

- the employer should have a strong business rationale for the redistribution;
- the redistribution alone should not be what eliminates the jobs of the bargaining unit;
- the redistributed duties should not occupy a large portion of the work of the individuals outside the bargaining unit; and the employer should first review the collective agreement language - in particular, any protection of bargaining unit clauses - to determine any limits on an ability to transfer duties or the consequences of doing so.

In the current economic and health environment, it is likely that the outside forces affecting employers with unionized workforces will have strong rationales for workforce reorganization. Though there exists risk of grievances, employers should engage in a measured and planned reorganization based on their knowledge of their business and the markets they service. (https://www.mross.com/what-we-think/article/transferring-work-and-duties-of-union-workers McLennan, 2020)

10 tips to prevent workplace burnout

Chronic job stress can result in exhaustion, frustration, and a lack of productivity at work — but burnout is much more than just feeling overwhelmed at work. It can also impact your team's health.

According to the Mayo Clinic, workplace burnout can cause insomnia, heart disease, vulnerability to illness, and even Type 2 diabetes.

Applying simple solutions to this critical issue won't cut it. That's why you must take significant steps to prevent workplace burnout before your team faces these severe consequences.

➤ Monitor excessive work hours

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Long work hours are also a risk factor for burnout. When combined with a lack of breaks or flexibility, studies have shown that they're detrimental to your team's health. The World Health Organization found that excessive work hours led to 745,000 deaths in one year.

To combat this, establish a policy for overtime and consider adding a cap to your team's work hours. This will also help you keep overtime costs to a minimum.

➢ Set clear expectations

Clear boundaries and expectations can help your team understand what you expect from them. Setting reasonable goals and guidelines for your team can eliminate stress by letting them know what success looks like in their position.

These expectations might include workday hours, communication standards, and project completion rate. When you set clear expectations, your team will feel more comfortable in their role and know how to succeed.

➢ Give and receive feedback

Communication is crucial to minimizing burnout. Check in with team members regularly and give them feedback on their performance. And be willing to receive feedback in return.

Constructive feedback can help them perform better, and positive feedback can let them know when they're on the right track. When your team knows they can come to you with issues, you open the door to conversations that can prevent burnout.

➢ Manage workloads

Carefully managing your team's workload can be one of the best ways to minimize their risk of burnout. Effective workload management can be the difference between a successful, productive team and a burnt-out workforce. Strategically assign tasks and let team members know they can approach managers about their workload whenever needed.

➢ Offer flexible schedules

If your industry allows for it, create a flexible work policy. This can include working from home or flexible hours. If you can't accommodate a flexible work schedule, encourage your team to work reasonable hours and take breaks.

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A healthy work-life balance can improve your team's productivity. When team members can step away from work to walk their dog or spend time with loved ones, it may enhance engagement levels and decrease burnout. In fact, employees with an excellent work-life balance work 21% harder than those who don't.

➤ Employee appreciation

Employees who are overworked and underappreciated are more likely to experience burnout. Making team members aware of their hard work and contributions is a great way to keep them motivated and engaged.

Try to get creative with employee appreciation by endorsing them on LinkedIn or sending a personal message acknowledging their progress. Check out our employee appreciation examples if you need some ideas.

➤ Offer support

A lack of support can lead to employee burnout. When you help team members manage their workload, you can reduce their risk of burnout and strengthen your team's bond.

You can help your team by eliminating bottlenecks and managing workplace stress. Encourage all team members to support their colleagues and model this behavior by helping your team.

➤ Cultivate your company culture

Improving your company's employee experience is a great way to reduce stress and encourage employee engagement. One way to do this is to create a healthy company culture that prioritizes a work-life balance for your team.

If you manage a remote team, remote company culture is especially important. Organize regular check-ins with your team and come up with clever ways to strengthen team chemistry across borders.

➤ Ensure employee well-being

Self-care and physical wellness are crucial steps to reducing burnout. As a business owner or manager, you can consider talking to your HR department about including mental health or counseling in your health care package.

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Or, create incentives for your team members to get exercise. According to the Anxiety & Depression Association of America, physical health can help you better cope with stress.

➢ Work on employee engagement

Employee engagement can benefit productivity and improve your employee experience. The Harvard Business Review found that organizations with a high level of engagement are 22% more productive than those that don't. An engaged workforce is more likely to be productive and content in their work.

It's crucial to address burnout before it impacts your team's mental health and productivity. It's better to take steps to prevent burnout before it occurs rather than reverse its effects once they've set in.

Even if one burnt-out employee starts to fall behind on work, it could spread to others. When the employee's team steps in to help, they'll have to increase their respective workloads too. After all, burnout stems from the work environment you create, not your team members.

Use the tips to deal with workplace burnout before it becomes a problem for your organization. You can prevent burnout by managing your team's workload, organizing regular check-ins, and creating a healthy company culture.

Using the right tools to check in could help your team improve retention rates and productivity moving forward.

(https://hubstaff.com/blog/signs-of-employee-burnout/ Nekvinda, 2022)

If you notice signs of employee burnout, take immediate steps to prevent it from continuing. Here are 10 ways to stop burnout in its tracks.

➢ Elicit employee feedback.

As an employer, you must make sure your employees are being heard. Ideally, an employer would engage with a team member well before burnout begins, but the day-to-day workload can sometimes prevent this from happening. When burnout does begin to manifest, meet with your employee to get to the heart of the problem. Sometimes the solution is apparent, and other times it's a bit more complicated. You'll never know unless you listen.

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> Create reasonable workloads.

When employees are bogged down with an unreasonable amount of work, they may feel that they are always playing catch-up. This can cause them to overwork themselves, eventually leading to burnout. To avoid this, create fair workloads for each employee so that they are set up for success. Have managers monitor employee productivity and performance. If they notice an employee's performance start to slip, that may indicate that the employee is reaching burnout and needs help.

> Offer flexible scheduling.

If we learned anything over the course of the pandemic, it's that flexibility is key to employee happiness. Flexible scheduling, also known as flextime, gives employees the ability to create their own schedules. This lets employees choose the work hours that best accommodate their personal and professional needs. For example, one employee may choose to work between 7 a.m. and 4 p.m., whereas another may work better between 9 a.m. and 6 p.m. When employees have the ability to create a work schedule around their own needs, they are at a lower risk of burnout.

> Promote mental health days.

Employees are more likely to experience burnout if they are stressed out and struggling with their mental health. Employers can support employee mental health by offering mental health days. Allow employees to use their mental health days at their leisure, whenever it's of most value to them. They will feel more comfortable taking mental health days if they feel company leadership is supportive.

> Offer paid time off – and encourage employees to take it.

Offer employees ample paid time off (PTO) so that they can relax and recharge. The specific PTO policy you make will depend on your business; some businesses can afford to offer only two weeks of paid vacation, while others can offer unlimited PTO. However, simply offering paid vacation is not enough. It's essential to encourage employees to use their days off. Create a workplace that celebrates paid time off so that employees don't feel forced to leave unused

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vacation days on the table. Time off allows employees to reset physically and mentally so that they can come back to work ready to produce.

➢ Provide functional equipment and software.

Nothing can be more maddening than having to use a tool, equipment or software that is ineffective or slow to respond. Not only does the equipment's performance reflect poorly on the employee's production, but the failure of management to recognize the need to upgrade can also create an air of helplessness. Frustration with equipment can be one of the first symptoms of burnout, so solving this problem can alleviate work-related stressors tremendously.

➢ Treat your employees fairly.

Nothing causes burnout quicker than watching someone else receive preferential treatment or get credit for the wrong reasons. Even worse is unfairness that seems arbitrary. Pay inequality, random promotions, capricious recognition – all of these can create animosity or a sense of despair in an employee. They're made worse by the fact that, in most cases, the employee must bottle up their feelings.

➢ Give your employees a voice.

For employees who feel that they have no say in organizational decision-making, burnout can be a natural or even expected consequence. These tips from Dale Carnegie on empowering employees have endured because they work:

- Challenge your team members.
- Stoke their passion for your company's vision.
- Give them clear opportunities for advancement.
- Apply the same measuring criteria to everyone.
- Get out of their way and let them do their work.

➢ Have fun.

Employees who enjoy coming to work will burn out far less frequently than those who loathe their job. Why not build a positive work environment for your employees? Stocking the fridge

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with goodies, having lunch-hour parties, and giving half-days off before a holiday can all boost morale and prevent employee burnout.

> ➤ Recognize success.

No matter what they tell you, every employee wants to feel needed. An unexpected pat on the back or recognition in front of peers for a job well done can be a tremendous ego boost and go far toward stemming the onset of burnout. According to an employee engagement study by O.C. Tanner, a Great Place to Work-Certified company, 37% of respondents believe employee recognition is the most significant factor in a team producing great work.

(https://www.business.com/articles/6-ways-to-prevent-employee-burnout/ Schooley, 2023)

Used sources:

School of Education Online Programs (2021, February 16). Addressing teacher burnout: Causes, symptoms, and strategies: American University. School of Education Online. https://soeonline.american.edu/blog/teacher-burnout/

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Schooley, S. (2023, October 31). How to prevent burnout in the workplace. business.com. https://www.business.com/articles/6-ways-to-prevent-employee-burnout/

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5. Career and professional development

A career development plan is a structured approach for employee development. It enables an employee to assess their skills and interests, set professional development goals and create a strategy to reach them.

The plan may also include educational components such as certification or degree programs, networking strategies, and other activities designed to promote career growth. With a career development plan in place, individuals can create a roadmap for success and stay focused on reaching their professional development goals.

A career development plan can be tailored to fit the employee's specific needs and circumstances. It is important to start with a thorough evaluation of current skills and interests since these will serve as the foundation for setting attainable goals.

The importance of a career development plan for career growth

It's important for companies to develop and implement career development plans for their employees' career growth. Career development planning is one of the best ways to ensure that your employees are prepared for promotions, changes in job functions and advancement opportunities within the organization.

Having a career development plan provides both employers and employees with clear expectations about how to achieve success at each stage of an employee's career. It also helps to identify areas in which employees may need additional training or development. The employer can provide resources to help the employee reach their goals, while simultaneously developing a more productive and engaged workforce.

The step-by-step to create a career development plan

If you are dedicated to maximizing your employees' development, the below roadmap will guide you to help your people meet and exceed both your and their own expectations. Here is a step-by-step guide to creating a career development plan for employees.

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➢ Assess employee skills and interests

An employee's career development plan should begin with a thorough evaluation of their current skills and interests. This can be done through surveys or conducting 1:1 meetings. However, Nailted highly recommends not forgetting about the power of performance reviews for this purpose.

Performance reviews are a very useful tool to identify the progress made by employees during a certain period of time. This evaluation will provide valuable information about the employee's strengths, weaknesses and areas of improvement.

Don't overlook these common mistakes and best practices for performance reviews:

➢ Identify career paths for employee development

Once you have a better understanding of your employees' skills and interests, you can start to identify potential career paths for them. Consider the type of work they are interested in, as well as the strengths and weaknesses you've uncovered in the performance review.

➢ Set professional development goals

Once you've gathered all the information related to their skills and interests, you can begin setting professional development goals for their career growth. It is recommended to set SMART goals so these can actually come true and not just be forgotten in the first run:

S-pecific: The goal should be clear and specific, so that everyone understands what it is and what needs to be done.

M-easurable: There should be a way to measure progress towards the goal, so you can tell if it's being met.

A-chievable: The goal should be challenging but achievable, so that it motivates employees to work towards it.

R-elevant: The goal should be relevant to the employee's role and the organization's objectives.

T-imely: The goal should have a timeframe attached to it so that employees know when they need to achieve it.

➢ Create an employee development strategy

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Once the employee has identified their goals, you can help them create a strategy to reach those objectives. The plan should include activities such as educational programs, job search techniques, networking strategies, and other activities.

Bear this roadmap in mind when delving into the employee development strategy:

- Establish training and development needs: you'll need to establish the specific training and development needs your employees will need in order to achieve their career goals. This may include courses or degrees, workshops, or other forms of training.

- Assign mentors or coaches: a good way to help employees achieve their career goals is to assign them a mentor or coach. This individual can help them navigate their career path and provide support along the way.

- Encourage continuing education: one of the best ways to help employees develop their careers is to encourage them to continue their education. This could mean taking courses online or attending seminars and workshops.

- Set up rotation opportunities: job rotation opportunities can also be helpful in developing employees' career growth. This allows them to gain experience in different areas of the company and learn new skill sets.

- Help them optimize their work: help employees with productivity techniques so they can get into a healthy routine and see progress on their goals as soon as possible.

(https://nailted.com/blog/how-to-create-a-career-development-plan-for-employees/,

Hernández, 2023)

Used sources:

Hernández, L. (2023, February 8). How to create a career development plan for employees. nailted.com.   https://nailted.com/blog/how-to-create-a-career-development-plan-for-employees/

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6. Vocational aptitude

Leading employers know how important it is to place employees' professional development at the heart of company policy. Why? Their workers expect it. Talented professionals want to work for a company that will help them to build skills and knowledge and further their careers. Managers shouldn't minimize the importance of supporting their employees' career advancement. If they do, they risk undermining morale and productivity by leaving talented workers feeling like they aren't valued. And in the longer term, the company could face the loss of these dispirited employees to competitors.

So, show your workers that they have both company and manager support in their desire to grow professionally by applying the following strategies to promote the development of employees:

➤ Take a personal interest in employee career goals

If you're managing a remote team, you know how important it is to communicate frequently with your workers. That interaction should include meeting regularly with team members one-on-one so you can stay attuned to their career aspirations and expectations. This kind of manager support can help your staff feel valued — and lead to greater productivity and loyalty. Help your employees outline a potential career path within the organization, so they can better visualize their future at the company. Identify specific milestones for achievement and the supporting resources employees will likely need to tap along their journey. Clear, direct and consistent communication from the boss about career advancement steps can help workers feel more engaged.

➤ Promote training and development of employees

Job training and continuing education help to fuel employee career growth. So, you'll want to encourage team members to pursue relevant business courses and workshops that will further their career advancement. Virtual learning opportunities are a must for many teams right now, and fortunately, there are many affordable options available. (Even if budgets are leaner at the moment, keep in mind that an investment in employee career development can deliver a strong ROI for your business.)

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In addition to nurturing individual needs and growing specific skills, help your employees keep up with what's happening in the wider industry. One cost-effective method that's easy to arrange is to host lunch-and-learn sessions by video, featuring either external or internal guest speakers. Also, give your employees the time and flexibility to engage in industry events. Consider asking those workers to share what they learn at these events with their colleagues.

> ➢ Encourage mentoring and job shadowing

Establishing a formal mentoring program might be one of the smartest moves a company can make at any time — for itself as well as for its workers' personal and professional growth. Mentoring can also be an effective tool for onboarding remote staff.

Though often seen as a transfer of knowledge from tenured team members to less-seasoned employees, mentoring in the workplace is a two-way street. While senior staff members can offer hard-earned insights and professional guidance to less-experienced colleagues, they also can benefit from the fresh perspectives and technological know-how of up-and-coming employees.

> ➢ Rotate employee roles

The human brain thrives on variety, and job rotation is a smart way to shake up your workers' daily routine. Consider allowing employees to work in different but related departments or positions. (A job rotation program can help to facilitate this.) These opportunities will help your team members gain new skills, more appreciation for their colleagues' duties and a better understanding of the business.

Job rotation can also be an effective way to increase cross-departmental collaboration and build rapport in a remote team. And the organization will benefit from having a more well-rounded workforce.

> ➢ Support work-life balance

Hard work is a prerequisite for career advancement, but that doesn't necessarily mean committing to an endless series of lengthy workdays. Encourage your employees to work smart, maximize their efficiency, and leave time and energy for their interests outside of work. This

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advice is especially important for remote team members who may find it difficult at times to keep work and life separate.

The COVID-19 pandemic caused many professionals to rethink their priorities. Research has found that 40% of workers see themselves emphasizing their personal life over their job moving forward. This research suggests that despite the end of the public health emergency brought about by COVID-19, employers will be under even more pressure in the future to help their employees achieve a desirable work-life balance.

Taking a proactive approach to your team's well-being can also prevent stress from rising and leading to burnout. By adopting flexible policies that enhance work-life balance, you can buoy employee morale. You'll help your workers find the time to do their jobs, attend to personal demands, and even engage in professional development activities that can aid their career advancement.

> ➢ Paint the big picture

Reminding employees of their unique contributions to the company's mission adds meaning to their role. It can also increase their motivation to expand their responsibilities and advance in the organization.

Don't assume they already know how their work adds value, however. Offer regular insights into how their day-to-day actions make a difference to the organization. In your regular updates to team members, be sure to highlight the firm's progress toward key objectives. And acknowledge individual employees for specific achievements that are helping to drive the company toward those goals.

> ➢ Create a succession planning program

Succession planning can demonstrate to high-potential employees that you not only want to invest in their professional development but also see them evolving into future leaders for the business. That is a powerful message. So, don't push this important process to the back burner. Create a succession plan for every key position in your organization. It can help motivate employees to learn the skills and knowledge needed for career advancement.

Your employees will be better positioned to achieve their career goals if they know they have manager support. And even if your team is working remotely right now, it's still possible to

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make professional development of employees and career advancement high priorities for the business. Emphasizing employee career growth can create significant and lasting benefits for your workers. It can also help position your company to be even more competitive.

(https://www.roberthalf.com/us/en/insights/management-tips/7-ways-to-support-employees-career-advancement Half, 2023)

Professional aptitude could be described as the ability a person has to carry out the functions in their job description. There's no doubt that, with good tools, it's possible to optimize these skills in order to grow professionally and improve experience in different areas.

The goal of every worker is to grow professionally and that can be achieved by optimizing their work aptitude. This growth translates into improved results and better leadership skills.

Clearly, in order to actively lead a particular job sector, it's vital to have broad and well-honed skills. The search for personal and professional growth is something a good leader never forgets.

Aptitude and attitude: the differences

Aptitude is directly related to work experience and the job. It's about the training, studies, experience and all the skills that a person can develop in the workplace. Within a good Human Resources department these skills can be identified, so that the advantages that a candidate has in a personnel selection process can be established.

However, attitude is to do with the person. We could say that, although attitudes can be altered, improved or changed, they are inherent to personality.

A good balance between aptitude and attitude is essential for finding the perfect employee profile. If you are a candidate or are actively looking for a job, you need to reinforce both concepts when preparing for a possible job interview. Bear in mind that the HR team is trained to identify both issues and take them into consideration.

Personnel selection and professional aptitude

Analysing the professional skills of candidates taking part in a personnel selection process allows us to fill the jobs with people that are suitable for each of them. To do this, it's crucial to know the ups and downs of the vacant position and understand which aptitude is the one we need.

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Generally speaking, there will be many applicants putting themselves forward for the same job. Making the right decision is complex, but knowing how to differentiate between attitudes and aptitudes is very important to make the choice an easier one.

By analysing someone's CV it's possible to get good quality information on each candidate's skills and professional aptitudes. This is why it's important to develop good quality and properly updated CVs.

Assessment of work aptitudes

CV analysis: we carry out a first screening by carefully studying the candidate's CV and their skills.

Interview: we guide the applicant through the job interview so we can understand their strongest work aptitude and find out what their weaknesses are. This enables us to ascertain whether the candidate has the skills needed to do the job they have applied for.

Group tests: a good way of finding out each candidate's aptitude is by carrying out group tests as part of the selection process. These kinds of techniques allow us to analyse each applicant's professional leadership abilities and their skills.

Psychotechnical test: the psychotechnical test is key to understanding the difference between candidates' aptitudes and attitudes.

Professional aptitude for leading a sector

● Communication

The ability to communicate should be a top priority for every worker, especially if their goal is to become a great leader. They should also know how to express ideas and set up groups to discuss them.

When it comes to using electronic media, communication becomes extremely important. A good leader must be able to function perfectly through emails and be skilled at handling professional social media and networks.

● Ability to learn

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The key to being a good leader is not someone's current professional aptitude but in their capacity for improvement and optimization. Acquiring new job skills is just as important as maintaining the ones they already have. This considerably improves work performance.

Analysing new sector trends and learning from each of them is essential. As well as turning the worker into a priceless asset for the company, it enables them to improve their own professional growth.

- Increased creativity

Innovation and creativity are some of the most important professional aptitudes of any leader. It's essential to know how to come up with unique ideas that improve work and performance in the company.

- Changing perspective

A good leader will always see the same issue from different points of view. This means they can approach their actions from very different prisms that improve productivity in the company.

- Data analysis

Data is an essential part of doing the job. A good leader knows how to analyse data, allowing him or her to make decisions based on Big Data techniques.

In addition to these professional attitudes, a good leader must have leadership skills; be extremely committed to their job and to the company; they must have a proactive attitude; know languages; be decisive when managing a crisis and have good organizational skills. A professional attitude is key to future leaders.

(https://meltgroup.com/professional-aptitude-keys-to-leading-a-sector/ , Melt Group, 2020)

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7. Unknown variables – Competition, departures, lay-offs

Competition:

➢ Keep your educational organization brand consistent

Your district's brand or identity represents how you want parents and the community to perceive what you do and the quality of education you provide. The definition of a educational organization's "brand" depends on who you ask, but one common theme is that your brand is how people experience your educational organization or district. So, having a positive brand image is critical to attracting and retaining students as parents and students compare educational organizations.

Providing your stakeholders with a consistent brand experience (logos, colors, and images) across all of your channels (including websites, email messages, social media, publications, etc.) is a step in the right direction toward increasing your district's visibility and demonstrating professionalism.

➢ Update your materials & message

Every educational organization has a purpose, and it's important to update your messaging to highlight the best that your educational organization has to offer. Think about what you can show that will help parents and students understand what makes your educational organization unique. Take a fresh look at your marketing message to make sure it captures your distinctive programs, reflects a positive image, and has a powerful statement about your educational organization that conveys why it's a great choice.

Once you update your marketing message, do the same with your marketing materials to make them consistent with your new message. Be sure your homepage, social media, mobile app, teacher pages, news releases, department pages, and calendars are up-to-date with accurate copy, graphics, and photos. Not only will this draw people to your website, but it will also keep them coming back and enable you to tell your story your way. Post news releases, feature stories, and photos on both your district and educational organization sites to ensure your story gets told in a positive light.

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➢   Make your website parent-friendly

A well-designed and managed website is your greatest opportunity to promote your district. Websites are often the first place the public visits to learn about a district and the go-to place for resources – which makes them a prime channel for recruiting students and staff. It's also only the medium that you have complete control over.

Your website is your "store" where you can show parents and students that your educational organization is the best choice. Remember, parents will preview an educational organization online if they have a choice about where to send their children; job-seekers will visit a district website to review available careers and learn more about the district, and taxpayers will view district websites to see how and where their money is being spent.

Develop content that's relevant to specific audiences and empathizes with their wants and needs. Don't know what your audiences want? Ask them and conduct a quick check of your website:

–   Does your parent section include information about the educational organization choice process?

–   What information do teachers, staff, students, parents, and even taxpayers want to find on your website?

–   What's the best way to make that information accessible to them?

Once you determine what the members of your district want, recruit the support of district administrators and school leaders to deliver it. To get your visitors more engaged with your website, you can:

–   Create teasers for feature stories, links to classroom photo galleries, and sports videos.

–   Encourage reading and scrolling by using short sentences and paragraphs, engaging headlines and subheads, and bullet points.

–   Use everyday language — avoid complicated educational terms, program jargon, or acronyms.

➢   Say it with video

Video is a "must" for any effective marketing program. We're all exposed to video messages on the web and in social media that entertain us and influence our buying decisions. TikTok, Instagram, YouTube, and Vimeo have conditioned us to prefer short, authentic messages that engage and convince us.

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Many new and easy-to-use tools are available that make video production fast and easy — so there's no excuse not to feature video stories. Consider posting a featured video on your homepage, with a welcome message or a student success story. Be sure to keep videos short to make them more shareable — one to two minutes is best.

> ➢ Use photos to engage & entertain

To get a parent who may be visiting your website for the first time to stay and explore your site, you need to have content that makes an emotional connection with them. Few things capture your success story better than strong photography. Post them on your home page, rotate your photos regularly, and keep a photo library on your site that's readily accessible to parents and students.

> ➢ Increase your social media presence

Many districts are taking advantage of paid advertising across social media platforms like Facebook and Instagram. The best way to think about social media is not in terms of the different technologies and tools, but, rather, how these platforms allow you to communicate directly with your target audiences in places they are congregating right now.

Keep your social media accounts and pages fresh by connecting your website news with your social media posts so you can acquire new followers on an ongoing basis. Use the Page Insights metric tools on Facebook to monitor your progress.

Start small and consider targeted and inexpensive Facebook ads to build followers and increase engagement.

(https://www.finalsite.com/blog/p/~board/b/post/easy-ways-to-market-your-district Gleason, 2023)

Setting yourself apart from the competition is not an easy task, but it's worth it. Differentiating your educational organization from peers increases recruitment success both quantitatively and qualitatively. Ultimately, you want to make it easy for students to understand what makes you unique – and why they should choose your educational organization. What makes you unique? It could be anything from academics, social life, school spirit, reputation or a combination.

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Don't think your educational organization will stand out without effort. With some students applying to as many as seventy colleges there's a plethora of choices out there for every prospective attendee. And there are lots of other educational organizations courting prospective students. How are these students supposed to choose between all of the options? Make it easier for them by doing the work up front and differentiating yourself.

Here are five proven tips to get you started on differentiating your educational organization's brand from the competition:

> ➢ Find What Makes You Truly Unique

One of the most crucial ways to differentiate your educational organization from the competition is to show that you have what others lack.

In their book, The 22 Immutable Laws of Branding, legendary branding strategists Al and Laura Ries put it this way: "Branding in the marketplace is very similar to branding on the ranch. A branding program should be designed to differentiate your product from all the other 'cattle on the range.' Even if all the other cattle on the range look pretty much alike."

The goal here isn't to copy other educational organizations, but to understand how you want to mark yourself to stand out from other educational organizations. First, think about the things that your educational organization does really well or does differently from others. Do you have more diversity than your geographic peers? Is your biomedical engineering program in the top five in the country?

Second, select your competitor universities. Figure out what it is that makes those educational organizations similar and different. Perhaps one of your competitors has a record-setting football team, while your faculty boasts multiple Pulitzer Prize winners. Maybe you both have well-renowned physics departments.

Whatever the similarities and differences, document them, and then take a look at your competitors' branding strategies. Get a feel for how they position themselves – how is your educational organization unique? Where does it stand in contrast to their approach?

Going back to the cattle branding metaphor, a brand that looks exactly like another ranch's brand achieves none of its goals. To make your educational organization unique, you're going to have to make it stand out.

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This exercise is a good opportunity to expand your boundaries, as well. Is yours a technology-focused educational organization? Check out how liberal arts educational organizations are marketing themselves. You just might be able to mix and spin something new by adapting ideas from other brands that aren't your direct competition.

➢ Support Your Claims with Data

Once you've figured out what makes you unique, marketing isn't just a question of boldly declaring those features to students in the hopes that they will care. You've got to do more than just make claims; you've got to prove it. Identify what makes your educational organization unique and then support it in any marketing and outreach with data.

For example, if your claim is that you have the most diverse student body in your region, prove it with numbers. Conduct surveys within your student body to show that students appreciate and have benefitted from the diverse opportunities at your educational organization. Highlight diverse alumni in your communications. Encourage the formation of diverse clubs on your campus. Participate in diversity conferences, not just on a department level, but on a university-wide level.

If what makes your educational organization unique is the fact that you have the strongest academic programs, be sure to point these out in your marketing assets. Highlight lectures and presentations in your events calendar. Feature star professors in advertisements or spotlighted lectures. It's the age-old adage: practice what you preach. If you're going to make a claim in your marketing, be sure you can back it up with examples and statistics that will set you apart from the crowd.

➢ Use Testimonials From Current Students or Alumni

A heartfelt story is hard to ignore. In fact, 89 percent of B2B marketers say customer testimonials are their most effective content marketing tactic. This is an opportunity to try different strategies. Consider interviewing an alumnus with a great personal testimony in which your educational organization played an important role, or you might even tap a famous or highly successful alumni to share their story with prospective students.

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In these instances, videos are great promoters. Don't forget to include flattering images of your campus and facilities while your champion tells their tale. Even if your famous alum doesn't agree to speak, you might consider creating a video biography as a sort of testimonial.

Current students can provide great testimonies as well. According to Entrepreneur, testimonials have power because they build trust, aren't salesy and overcome skepticism. As Chegg puts it, "make your students the story, not the brand." You don't want a testimony that simply gushes over your brand. Instead, showcase a life-transforming narration that transcends your brand but also includes it as part of the cast.

Other factors that make a good testimonial are:

- Highlights personal benefits;
- Backs up your brand promise;
- Delivered by a person that the audience identifies with;
- Conveys authenticity.

Whatever you choose to do with your testimonials, be honest and welcoming. Prospective students will respond to authenticity, and will appreciate hearing about the experiences of those who came before them.

➢ Tell Your Story on Social

Are you leveraging social media to its fullest potential? If not, this channel should be given serious attention – 72 percent of incoming high school seniors reportedly researched prospective colleges on social media.

Another reason social media is important is because it's inherently mobile-friendly. Current overall Internet traffic is at least 56 percent mobile. You want to reach today's hyper-connected youth where they are, and for many, that's on mobile and social.

What story should you tell? The answer to this question depends on the goal of your outreach and the audience you're trying to engage. As mentioned, student testimonials from existing and graduated students do wonders for your brand, and can be edited to fit on micro-blogging networks like Twitter or Facebook.

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Consider sharing the things prospective students can't access from their hometowns, the things that make your educational organization unique and bring the campus experience to them. Course offerings, alumni achievements, campus news, athletic experiences, even information about the closest city or town…all of these things bring the student experience to life and show prospective students what they're missing out on by not being a part of campus.

Also consider the platforms you're using. Facebook and Twitter are tried and true, but may not be the only place your prospective students are spending time. Again, the mantra is to meet them where they are. Consider whether Instagram or other social media platforms make sense for your educational organization, and don't forget to fine-tune your YouTube channel, as well.

➢ Make Your Events Sparkle

Events just might be the most effective method for brand differentiation. Why? Because each event is a prime opportunity to generate online content with a live event as the centerpiece. Even the event itself becomes content with live feeds, summaries, event apps, contests and videos. While planning for your event, be sure to keep your brand position and promise front and center. The more your message is repeated in different contexts, the better it sticks in the minds of potential students.

Events are more than just efficient; they're effective. The top two strategies and tactics for recruitment for both four-year private and four-year public institutions, as identified by the Noel-Levitz consulting firm, were both events-based, with campus open house events coming in first and campus visit days for high school students taking second place.

Make sure you team up with a partner or sponsor when rolling out your events. This helps increase credibility and visibility while also potentially taking some work off your hands. Remember, brands love to connect with the younger crowd. Think freebies and exclusive VIP zones. You can also offer sponsored talks, contests, booths or live entertainment.

(https://concept3d.com/blog/localist-events/differentiating-your-school-from-the-competition/ Ingersoll, 2022)

Departures:

Understanding why teachers leave can help leaders develop and implement strategies that can result in fewer resignations during as well as at the end of the school year.

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Teachers were dealing with and responding to the pandemic, student learning loss, high academic demands, unruly student behaviors, burnout, and concerns with safety. And now, due to high inflation combined with limited pay and resources, many teachers have reached a breaking point.

Add in a strong job market that is providing more opportunities outside of education, the challenge of retaining teachers has dramatically increased.

Staying in tune to what teachers want and need to be satisfied in their jobs can be difficult but is important to address retention. Some teachers want more money while others want more respect, more recognition, more support, or more planning and collaboration time.

To compound the situation, what teachers need and want can change during the school year. Supervisors can watch for early warning signs that a teacher is looking for the exit door, such as decreased initiative or production, shift in attitude, lack of commitment, or dwindling enthusiasm.

While we know individuals leave jobs for many reasons it's important to determine if the reason is involuntary or voluntary. Some reasons are out of an employee's control while others are in their control. Examples of involuntary resignations could be because of a spouse changing jobs, health reasons, or termination due to poor performance. Intentional retention strategies should be designed to focus on the voluntary reasons.

Once specific reasons are determined, verify them with supporting data, such as exit interviews or anecdotal conversations. Next, brainstorm retention strategies, and finally, implement the most reasonable and popular ones.

Retention strategies to implement could include:

- Formally survey teachers on a regular basis at the organizational level.
- Informally survey teachers at the campus level.
- Implement stay interviews or regular check-ins with individual teachers or small groups of teachers.
- Respond quickly to feedback provided.
- Build connections and trust between supervisors and teachers by providing supports.
- Build a positive, supportive educational organization culture through daily interactions with individual teachers.

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- Schedule coordinating conference times with peer teachers to ease planning and data analysis.

- Ensure teams of teachers and/or professional learning communities (PLCs) are operating in a positive and productive manner.

- Evaluate work schedules and reduce tasks where possible.

- Provide extra behavior support with difficult students to reduce work stress.

- Provide community support and resources if available.

- Offer flexible options for professional development.

- Empower teachers by allowing the most amount of autonomy and flexibility possible in their jobs.

- Provide opportunities for teachers to serve in leadership roles.

- Ensure security measures are up to date and implemented properly at the campus and organization level.

- Build in regular recognition of teachers (e.g., at staff meetings, posting kudos on bulletin boards, and highlighting teachers on campus websites or newsletters) instead of waiting until the end of the year.

- Encourage staff to work reasonable hours — give permission to leave on time or even early on certain days without feeling guilty or pressured.

- Refrain from asking teachers to donate financially to student causes or to employee celebrations.

- Explore the availability of retention bonuses or employee referral bonuses.

- Provide information on available benefits such as the organization's Employee Assistance Program (EAP).

Continually communicating with teachers, understanding their needs and wants, and responding quickly to data collected can create a more positive and collaborative work environment resulting in higher retention rates of teachers.

(https://www.tasb.org/services/hr-services/hrx/recruiting-and-hiring/discouraging-teachers-from-leaving-mid-year.aspx Hoover, 2023)

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Oftentimes, unexpected departures are the symptom of a deeper, more systemic problem within an organization. However, many employers are unwilling to spend the time and resources needed to learn why their people are leaving.

So how can educational organization leaders address this rise in attrition?

First, we must be willing to delve more deeply into the root causes of employee attrition. Oftentimes, unexpected departures are the symptom of a deeper, more systemic problem within an organization. However, many employers are unwilling to spend the time and resources needed to learn why their people are leaving. While this is indeed the current trend, educational organizationss and other organizations can take steps to stem the tide, if retaining high-quality employees is an institutional priority.

As school leaders plan for staffing next year, here are six key questions to consider:

1) How do you create a sense of community for your employees?

While monetary incentives are appreciated, most employees are looking for authentic connection. They want to feel part of something greater than themselves that aligns to their values and ideals. This is true in almost any industry, but is especially important for independent educational organizationss and similarly mission-driven organizations. Employee relationships are crucial. How do they collaborate with one another? What informal opportunities allow for them to connect? How does leadership foster a culture of trust and respect?

2) Are your rewards transactional?

Are you giving bonuses, raises or increased benefits to improve employee morale? If so, this will not be enough to entice top performers to stay. People need to feel valued and appreciated for their contributions. This does not mean a blanket statement to all 70 people during a staff meeting, congratulating them on a job well done. It means taking the time for one on one interactions; highlighting specific behaviors or actions that have positively impacted the organization.

3) Do you have a good understanding of what your employees need?

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If your employees are giving 100%, but are stressed, anxious and not taking care of themselves, the answer should be obvious. Get them the help they need, listen to what they are telling you, and consider various resources that will address their stress and anxiety.

4) Do you have effective leaders and managers?

A bad leader and/or manager can be incredibly disruptive to a community. Are the individuals in charge of others doing their jobs and doing them well? It's natural for employees to have, at times, conflicts with others in their organization. But if there is a pattern of negative behavior or performance, it must be addressed. Educational organizationss are notorious for keeping bad employees, even at the detriment to the overall community.

5) Are you practicing distributed leadership?

During the pandemic, many leaders found themselves making quicker than normal decisions out of necessity, without much input from stakeholders. This is often the case in a crisis situation. While we continue to face COVID- related challenges, many educational organizationss and organizations put policies into place to help mitigate these issues. There is now an opportunity for leaders to build capacity among their employees and engage in distributive leadership. Are people empowered to do their jobs, or is there distrust that keeps decision making at the top and leaves employees feeling powerless?

6) Are you meeting the needs of your underrepresented employees?

Attention to diversity, equity and inclusion is critical. Have you created a community where everyone feels safe, welcome and valued? If the answer is yes, how do you know? Don't assume, ask. Make sure that those most vulnerable in your community feel a part of it.

As a leader, meeting employee needs and preferences can be a challenge, especially as you engage with many different people with a range of perspectives. While it's impossible to meet every individual need, it is important to understand what your community needs collectively. Don't assume. The only way to know is to ask. Using tools such as a climate survey or employee satisfaction survey can help. Leaders who take the time to learn what their employees need and make changes accordingly will be the ones who see less attrition and retain the most talented employees in the long run.

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(Sudden Departures — How School Leaders Can Stem the Tide of Employee Attrition | by Ari Betof | Mission and Data | Medium Betof, 2021)

Lay-offs:

Tough economic times inevitably translate to budget cuts. This often means public schools-and teachers-bear a large share of the burden. Needless to say, news about teacher layoffs worries communities, causing stress for experienced and prospective teachers alike.

With all of the pessimism, learning how to differentiate fact from fiction can help you make a plan to keep yourself ahead of the curve.

Tips for educational organization staff - How Educational Organization Layoffs Play Out for Teachers:

Teacher layoffs come in many different forms, from pink slips that warn you of an impending job loss to straightforward news that your job is gone. As a current or new teacher, you need to know whether the regulations in your state or your school district put you more at risk in a teacher layoff and what avenues are available if you lose your job.

For example, in New York, teachers with the least experience are the first teachers laid off, regardless of their job performance. And USA Today reports some districts back fill lost teaching positions with transferred senior teachers and administrators, so if you are an experienced teacher, your chances of a quick rehire may be pretty good.

Other school districts manage to avoid teacher layoffs through natural attrition. According to Eugene's The Register-Guard, some school districts in Oregon avoided layoffs by not rehiring the teacher positions that were left open after retirements and resignations brought staff numbers down by nearly 30. In fact, some districts offer teachers an early retirement option to avoid a layoff.

- Make Layoffs Work For You

If you are a current teacher concerned about being laid off, you have a number of options that can help you take an educational organization layoff and use it to build your career. And if you are currently a teaching student, concerned about entering the field at such a difficult time,

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continuing your education for an extra leg up can only help your chances-not to mention enrich your teaching-both now and in the future.

- Specialize in a High-Demand Subject

It may seem counter-intuitive that the same districts implementing educational organization layoffs are also hiring. But since certain subject areas are understaffed, some teachers find their talents in demand, even in today's job market. Generally, school districts place the highest demand on teachers of science, foreign languages, math and special education.

If your passion lies with a low-demand subject, earning an additional teacher certification, or even an advanced degree, in one of the high-demand subjects can help you - as a new or current teacher - increase your job prospects and your job security.

If you are concerned about taking on a tuition bill after losing your job, do some research and you will find a large number of resources to help you secure financial aid for your advanced teacher education. These include scholarships and grants that you do not have to repay as well as money available under the federal stimulus plan.

- Relocate, If It Makes Sense for You

While the job market for teachers in general is bleak, the clouds over some cities carry a significant silver lining. In spite of teacher layoffs, many districts are actually hiring for a number of teaching positions!

Other towns may offer job openings that meet your career goals. If you can relocate to another school district, you may find a better job market.

- Work as a Substitute Teacher

If teacher layoffs claim your job and you can't relocate, substitute teaching remains a viable option. School districts still need substitutes: teachers get sick, take vacations and require family leave during recessions, too. As a substitute teacher, you will gain versatile experience teaching a wide range of students, from teaching third graders multiplication tables to leading a high school computer class.

Each time you substitute, you have the chance to demonstrate your creativity and excitement as a teacher-and make some money. Most importantly, substituting allows you to stay in touch

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with your profession and network with other teachers and administrators. If a long-term job opportunity should arise, your name will be fresh on the minds of administrators who make hiring decisions.

(https://www.alleducationschools.com/blog/how-to-thrive-during-teacher-layoffs/ , All Education Schools, 2023)

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8. Demand forecasting

Demand forecasting and capacity planning are crucial skills for manufacturing operations, as they help you align your production with customer demand, optimize your resources, and avoid waste and inefficiencies. However, developing and training your staff on these skills and competencies requires a systematic and strategic approach. Here are some tips and best practices on how to do it effectively:

➢ Assess your current situation

The first step is to assess your current situation and identify the gaps and opportunities in your demand forecasting and capacity planning processes. You can use various tools and methods, such as SWOT analysis, benchmarking, gap analysis, or surveys, to evaluate your current performance, challenges, and needs. You should also involve your staff in this assessment, as they can provide valuable insights and feedback on their current skills and competencies.

➢ Define your goals and objectives

The next step is to define your goals and objectives for developing and training your staff on demand forecasting and capacity planning skills and competencies. You should align your goals and objectives with your business strategy, customer expectations, and industry standards. You should also make them SMART (specific, measurable, achievable, relevant, and time-bound), so that you can track your progress and evaluate your results.

➢ Choose your training methods and tools

The third step is to choose your training methods and tools that suit your goals, objectives, and staff needs. You can use a variety of training methods and tools, such as online courses, workshops, webinars, simulations, case studies, or mentoring, to deliver your training content and activities. You should also consider the learning styles, preferences, and levels of your staff, and tailor your training methods and tools accordingly.

➢ Implement your training plan

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The fourth step is to implement your training plan and execute your training activities. You should communicate your training plan clearly and effectively to your staff, and ensure that they understand the purpose, expectations, and outcomes of the training. You should also provide them with the necessary resources, support, and feedback during the training process. You should also monitor and measure your training performance, and adjust your training plan as needed.

➢ Evaluate your training results

The fifth step is to evaluate your training results and assess the impact of your training on your demand forecasting and capacity planning skills and competencies. You can use various methods and indicators, such as quizzes, tests, surveys, interviews, or KPIs, to measure your training results and outcomes. You should also compare your results with your goals and objectives, and identify the strengths, weaknesses, and areas for improvement of your training.

➢ Continuously improve your training

The sixth and final step is to continuously improve your training and ensure that your staff maintain and enhance their demand forecasting and capacity planning skills and competencies. You can use various strategies and practices, such as feedback loops, coaching, mentoring, refresher courses, or learning communities, to reinforce your training and support your staff's learning and development. You should also keep up with the latest trends, technologies, and best practices in demand forecasting and capacity planning, and update your training accordingly.

(https://www.linkedin.com/advice/0/how-do-you-develop-train-your-staff-demand , LinkedIn, 2023)

Process: How to forecast and report the demand for teachers at educational organization level

At the end of each school year, school leaders must estimate the need for teachers at their educational organizations for the next school year and for the following five years. This practice applies many of the same criteria as national workforce forecasting (see below).

At educational organization level it is a matter of simply counting: Who is expected to retire and when? Who will be promoted to a higher position and when? What is the expected increase

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or decrease in pupil population? How often on average (based on experience from previous years) will a teacher transfer to another educational organization or leave the service? Etc.

The school leader must supply information on recruitment needs at their educational organization to their TSC-DO by using a regular calculation based on the below criteria. The TSC-DO will aggregate the results at district level and submit it to TSC-HQ, which will then use information from all districts to forecast the need for recruiting teachers on a national scale.

To forecast educational organization workforce demand, leaders should apply the following criteria:

- Increase or decrease in the estimated number of pupils;
- Teacher-pupil ratio;
- Total population of required teachers based on teacher-pupil ratio;
- Need for teachers with subject specialization for specializations in secondary schools;
- Teachers who are expected to retire;
- School leaders who are expected to retire or be promoted to the civil service, TSC, etc.;
- Teachers who are expected to be promoted to school leader positions;
- Estimation of teachers who will transfer to other educational organizations (based on the trend from previous years);
- Estimation of teachers expected to separate from the service (based on the trend from previous years).

One of the teaching service´s main responsibilities is to ensure that every class and grade in every educational organization throughout the country is sufficiently staffed by qualified teachers who can deliver the scheduled lessons according to the curriculum and expected standards. When this is not possible, due to teacher illness or another unexpected incident, the school leader must ensure a temporary replacement.

Therefore, the teaching service at national, district and school level must assess teacher demand for the coming school year and for the next five years to ensure:

- an adequate supply of teachers from teacher training colleges;
- adequate budget allocation to educational organizations and districts;
- timely recruitment in time for the start of the school year;

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- Workforce planning is essential to avoid being taken by surprise by major increases or decreases in demand resulting from changes to policies or regulations, teacher-student ratios, demographics or the number of children of school age.

When deploying teachers, the teaching service must aim to ensure an even distribution of qualified teachers, subject teachers and young teachers between urban, rural and remote areas. They must also aim to improve gender balance within the teaching service.

Effective workforce planning ensures the teaching service is rightsized with the right people in the right place at the right time. Rightsizing ensures optimal cost-efficiency and effective use of the workforce, achieving the best possible result for the least cost. Inadequate planning and utilisation of the workforce is costly in the long run.

Workforce planning and forecasting requires cooperation across several educational institutions including: educational organizations, district education and school authorities, TSC, MBSSE, MTHE, universities and teacher training colleges, and labour market institutions. The Education Management Information Systems (EMIS) is based on the school census and is an important source for the forecast of teachers.

Best Practice: General criteria for forecasting teacher workforce

MBSSE is overall responsible for forecasting the demand of teachers for national planning and budgeting, while TSC must forecast for annual recruitment and deployment.

The following criteria (estimations) can be applied to forecast the demand for teachers at national level:

- Teacher student ratio;
- Population growth and annual increase of children in the school age;
- Demographic changes (for instance people moving from rural areas to urban areas)
- Increase or decrease in dropout rate;
- Increase or decrease of passing rates;
- The need for qualified teachers at each level (pre-, grades 1-3, grades 4-6, etc.);
- The need for qualified subject teachers in different specialisations in secondary schools;
- Promotions from teacher into school leader positions or into the civil service;
- Turnover rate, including scheduled retirements, estimated separations from service, etc.

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How to attract and retain teachers

An important part of planning in an area of shortage is to find ways of attracting and retaining staff. In case of facing a shortage of qualified teachers, attract young people to enroll in teacher training colleges and subsequently opt for a career in the teaching service.

In order to encourage young people for the teaching profession the teaching service has a range of options including:

- Organise promotion activities regularly, preferably annually, at the end of each school year and before exams for coming graduates in secondary schools and teacher training colleges.

- Apply young people's means of communication, information and learning, such as social media.

- Explore and implement means of raising the status of the profession through media campaigns.

- Highlight the advantages of being a teacher.

- Meaningful job impacting on the country's economy and progress, social conditions and poverty elimination, the future careers of pupils, etc.

- The joy of working with children.

- Opportunities for creativity in teaching.

- Opportunities for pursuing and developing subject interests.

- Lay-out an attractive career path for teachers (from rural community school to UNESCO).

- Offer benefits to teachers if possible, such as housing, school meals, etc.

- Offer a good work environment, i.e. good facilities, common rooms for teachers, cleanliness, open and green spaces, proper classrooms which are not crammed, etc.

- Enhance best-practice leadership in educational organizations.

- Ensure smooth administration of all HR processes pertaining to teachers.

- Promote a stimulating academic and learning environment for teachers.

- Provide insurance, a good pension scheme and similar benefits to teachers.

(https://hrmanual.tsc.gov.sl/books/21-teacher-workforce-planning/export/html, TSC HR Manual, 2023)

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Why is Staff Leave Planning Important?

Staff leave planning involves managing employee time off requests, including vacations, holidays, sick leave, and parental leave. Without proper planning, the result will be stress and burnout for your team, decreased productivity, and increased absenteeism.

There are several approaches to managing employee leave planning. Using a staff leave planner is one of the most popular ones. This is because an automated staff leave planner allows a single source of truth for absences to remove any confusion or disputes about when and what absences occurred.

Some staff leave planners even come as part of all-in-one HR systems that can automate every process. With these systems, employees can easily submit their requests. Managers can also quickly approve or deny them in one convenient platform.

Best Practices for Staff Leave Planning in Educational Organizations

To run your educational organization and manage your staff smoothly, follow these best practices:

  ➢ Establish Clear Policies

Clear policies are the bedrock of effective staff planning. Without them, confusion reigns, and disagreements can quickly escalate. Some educational organizations have implemented a "use it or lose it" policy for vacation time. Other educational organizations have established a point system for staff absences. This helps administrators track leave patterns and identify potential issues.

Here are some suggestions for creating and communicating policies that will help ensure smooth staff leave planning:

- Clearly define the types of leave available to staff, including vacation time, personal days, sick leave, and other relevant categories.
- Establish guidelines for requesting and approving leave, including timelines, required documentation, and procedures for emergency situations.
- Define the roles and responsibilities of all parties involved in the leave planning process, including staff members, administrators, and HR personnel.

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- Communicate policies clearly and consistently through staff handbooks, email announcements, and other relevant channels.
- Provide ongoing training and support to ensure everyone understands and follows the policies.

➢ Establish Communication Protocols

Effective communication is essential for successful staff leave planning. Leave requests can fall through the cracks without clear and consistent communication protocols.

Here are some suggestions for developing communication protocols that will ensure smooth staff leave planning:

- Establish a transparent chain of command for leave requests and approvals.
- Establish clear timelines for communication.
- Use a centralized system for tracking leave requests and approvals
- Clearly communicate the status of leave requests to all parties involved
- Provide ongoing training and support to ensure everyone understands and follows the communication protocols.

Several best practices for communication in staff leave planning in educational organizations are worth considering. For instance, some educational organizations hold regular staff meetings to discuss staff leave policies and procedures and to provide updates on leave requests and approvals. Other educational organizations use automated email notifications to keep staff members informed of the status of their leave requests.

➢ Utilize Technology to Streamline the Process

Technology can play a significant role in streamlining the staff leave planning process. Educational organizations can reduce errors, save time, and improve efficiency by automating specific tasks. Here are some suggestions for utilizing technology to streamline the staff leave planning process:

- Use an Online Staff Leave Planner

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An online staff leave planner allows staff members to request leave and managers to approve or deny those requests, all in one centralized system. This reduces the likelihood of errors and miscommunications and ensures that all leave requests are recorded and tracked in one place.

- Utilize calendar integration

Calendar integration is a feature that allows staff leave requests to be automatically added to staff members' calendars, ensuring that everyone is aware of upcoming absences.

- Implement Automated Notifications

Automated notifications can be set up to remind staff members of upcoming leave and notify managers of leave requests and approvals.

Leverage analytics: An automated staff leave planner can provide insights into leave trends, allowing educational organizations to identify patterns and plan accordingly.

➢ Address Staff Morale and Well-Being

While managing staff leave is essential, you must prioritize staff morale and well-being. Here are some tips to help educational organizations address staff morale and well-being:

- Encourage self-care: Encourage staff members to take breaks and prioritize self-care activities, such as exercise, meditation, or spending time with loved ones.
- Acknowledge hard work: Take the time to recognize staff members' hard work and show appreciation for their contributions to the educational organization community.
- Offer professional development opportunities: Providing opportunities for staff members to develop their skills and knowledge can help them feel valued and invested in their work.
- Foster a positive workplace culture: Creating a culture that values open communication, collaboration, and respect can help improve staff morale and well-being.

Managing staff leave has become more critical in a world where we all could use more time off. But, with the right tools and strategies, one can become a master of staff leave planning. Whether you prefer to plan your team's leave with pen and paper or fancy tech tools, remember to keep your communication crystal clear, your policies precise, and your staff morale high.

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9. Connecting the current workforce with future HR needs

> Analyzing Employee Data to Create a Strategic Plan

To ensure a successful strategic plan for the organizational workforce, it is essential to analyze employee data in a systematic manner. Through examination of such information as skillset, education level, job history, and performance evaluations, employers can carefully assess each individual's strengths and weaknesses to create an effective and profitable workforce plan. By implementing an organized approach to employee data analysis, managers will be able to better understand the capabilities of their team and identify areas for improvement - resulting in improved productivity and harmony within the workplace atmosphere.

> Engaging Leadership in the Workforce Planning Process

An effective way to engage leadership in the workforce planning process is to highlight the strategic benefits of workforce planning. A well-defined plan can equip management with the insight necessary to approach resource allocation and hiring decisions with a unified vision. It's also important to emphasize the important interplay between people and processes within an organization, so that management can grasp how any changes in HR operations will impact workflow in both the short and long terms. By engaging them in conversations regarding talent gaps and creative approaches to filling those gaps, managers are more likely to buy into the overall mission of workforce planning and fully embrace its potential benefits.

> Creating a Communication Strategy to Align Employees with Goals

A solid communication strategy is key to connecting employees with their goals and keeping them aligned with the company's objectives. This should be a priority during workforce planning, as synergy between the members of a team is essential for success. Establishing clear objectives, understanding the strengths and weaknesses of each team member, and utilizing collaboration technologies can help ensure that everyone on the team is on the same page and working in harmony to reach their common goals. By communicating frequently and openly, employees will feel engaged and better prepared for success.

> Leveraging Technology to Streamline HR Processes

Technology is playing an ever-increasing role in many aspects of human resources, and workforce planning - the process of predicting future needs and establishing strategies to meet those needs - is no exception. By leveraging technology to automate and streamline HR

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processes related to workforce planning, businesses can save time, reduce errors, and better optimize their employees' capabilities. Through technology, decision makers can obtain more accurate insights from data collected from multiple sources quickly and with greater accuracy than manual methods. By investing in the right technology solutions for their HR processes related to workforce planning, businesses can greatly improve their efficiency while freeing up more time for strategic tasks that support the organization's future plans.

(https://www.linkedin.com/pulse/impact-strategic-workforce-planning-hr-processes-chantelle-miller/ Miller, 2023)

➢ Forecasting Workforce Needs

The organization's strategic plan and allied business plan provide guidance as to the number and type of employees that the organization needs during the planning period. Expansion, retrenchment, new products or services, introduction of new technology, entrance of new competitors in the market, economic conditions, employee retirements, workforce turnover, and so forth must be considered when forecasting workforce needs. Forecasting is the process of using both historical data and predicted scenarios to determine workforce needs during a stated planning period. Following is a discussion of several forecasting methods that are often used.

● Trend Analysis

Trend analysis involves studying historical organizational employment levels to predict future employment levels. For example: If, on average, employment levels in the organization have increased 5% per year, it might be logical to forecast a 5% increase for the next planning period. A more accurate forecast using this method might be to evaluate trends in separate departments or other organizational sub entities and then aggregate the increases (or, potentially, decreases) at the organizational level. Doing so provides more specificity as to not only the numbers of employees but also the types of employees needed.

Trend analysis assumes that history will repeat itself. In today's more volatile times that might not be the case. However, trend analysis provides some data on which a final forecast can be made.

● Ratio Analysis

Ratio analysis is a forecasting technique that assumes a set relationship between one variable and another, and that the relationship allows for the prediction of workforce needs. Assuming no increases in productivity, an organization might be able to predict total workforce

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requirements based on predicted total sales or total productivity. For example: If, historically, it takes five employees for each 100,000 unit of product produced, a projected increase of 1,000,000 units per year will require an additional 50 employees.

Organizations often have standard staffing tables that can be used in ratio analysis. As an example, a restaurant chain would know how many servers, cooks, managers, and so forth are needed to staff a restaurant. Based on a projected expansion in terms of number of restaurants, increase in workforce needs can be forecast.

- Turnover

Analysis of historical turnover—in reality a type of trend analysis—provides additional data for forecasts. Average turnover rates provide an indication of the number of new employees required just to maintain current employment levels. Obviously, turnover is affected by many environmental factors, most notably unemployment rates, so other variables must be considered when using these data for forecasting.

- Nominal Group Technique

The nominal group technique is a group-forecasting and decision-making method that requires each member of the group to make an independent forecast prior to discussion of any forecasts. Members of the group meet and independently develop a forecast. Each member must present his or her forecast before any of the forecasts are discussed. After all presentations are made and clarifying questions addressed, the group works to come up with a final forecast.

- Delphi Technique

The Delphi technique is another group forecasting method in which experts independently develop forecasts that are shared with each other, but in this approach the experts never actually meet. Each of the members refines his or her forecasts until a group consensus is reached.

NOTE:

The nominal group and Delphi techniques are used to avoid the phenomenon known as group think. Group think occurs when group members, in the interest of developing group cohesiveness, reach consensus without fully considering what might be divergent forecasts.

- Managerial Judgment

Managers and executives are asked, based on their experience and knowledge, to develop forecasts. Forecasts, like budgets, can be a top-level overall estimate or a bottom-up aggregation

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of multiple departmental estimates. Top-level forecasts provide a gross indicator of needed employment levels, but do not indicate where those employees should be allocated in the organization. Bottom-up forecasts, provided by managers in the various departments, provide a better idea of allocation of the workforce and the types of employees that are needed. However, bottom-up forecasts tend to overestimate workforce needs as each manager tries to increase staff size.

- Statistical Forecasts

Various statistical procedures, including regression analyses, can be used to develop forecasts based on scenarios or theorized relationships between variables.

- Computer Modeling

Many organizations use sophisticated forecasting software. This permits the organizations to evaluate workforce needs under various scenarios.

- Multiple Methods

No single forecasting method is likely to be accurate every time. Most organizations use multiple methods to develop different forecasts. Ultimately, it is likely to be a top-level manager, using intuition based on accumulated knowledge and years of experience, that makes the final determination of the most likely forecast.

➢ Determining Internal and External Supply of Employees

Not only must the demand for employees be determined, but workforce planning must include an analysis of the potential supply. Forecasts must be made of the supply of candidates for jobs within the organization and the supply external to the organization in the relevant labor market. Methods of forecasting supply, internally and externally, are discussed below:

- Internal Supply

The internal supply of candidates can be determined using a number of methods, such as replacement charts, succession plans, human resource management information systems, and departmental estimates. A brief discussion of each of these methods follows:

– Replacement Charts

Replacement charts are manual or automated records indicating which employees are currently ready for promotion to a specific position. If needs are forecasted for a particular job, replacement charts provide data with which to determine the supply of internal candidates to fill the openings.

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– Succession Planning

The concept of succession planning is similar to replacement charting except the time perspective is different. Succession planning is the process of identifying candidates for future openings. It is a longer-term plan for developing candidates to fill positions. Traditionally, succession planning has been reserved for only high-level positions. However, because of the increased importance of human capital in many organizations, succession plans are being developed for the orderly replacement of lower-level employees.

– Human Resource Management Information Systems

Many human resource management information systems frequently contain data on qualifications or skills of current employees. After workforce demand is forecast, the database can be queried regarding the supply of potential internal candidates that possess the necessary qualifications or skills.

– Departmental Estimates

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Organizations are not static. Most organizations and their component departments experience constant flows of employees both in and out. Analysis of this movement provides valuable information to forecast internal supply. Table 1 provides the formula used to forecast internal supply within a particular department in the organization and common sources of employee movement in and out.

Current Staffing Level – Outflows + Inflows = Internal Supply	
Inflows	**Outflows**
Transfers from other departments	Retirements
Hires from the external labor market	Resignations
Recalls from layoffs	Death
Returns from leaves of absence and sabbaticals	Promotions to other departments
	Transfers to other departments
	Terminations

Table 1

● External Supply

There is a huge amount of information available to assist in the forecasting external supplies of labor. State and local economic and workforce development agencies typically can provide data on the labor supply availability. The Department of Labor (http://www.dol.gov/) has data available for virtually any location and publishes annual forecasts of labor supply by occupation, and the Bureau of Labor Statistics (http://www.bls.gov/) provides a wide variety of

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labor force information that is available online. In addition, various professional organizations regularly analyze labor availability within their respective professions. The availability of external candidates is affected by:

- Economic conditions;
- Unemployment rates;
- College and high school graduation rates in the relevant labor market;
- Net migration in or out of the area;
- Relative skill levels of potential candidates in the labor market;
- Competition for labor in the labor market;
- Changes in the skill requirements of the organization's potential job openings

You should be familiar with the various methods of forecasting for both demand and supply of employees and candidates.

Determination of Strategies

The analysis of demand and supply for labor leads the Senior Professional in Human Resources (SPHR) to develop appropriate strategies to achieve the planned level of employment. The result of the analysis can result in one of three conditions:

- Equality: In which case the strategy becomes one of retaining current employees;
- Insufficient number of employees: In which case the strategy becomes recruitment;
- Too many employees: In which case the strategy becomes decruitment.

Retention of employees involves strategies designed to maintain or improve job satisfaction and organizational commitment. For example, retention strategies involve creating pay equity and providing desired benefits when compensation and benefits strategies are being developed.

It would be very similar if the analysis reveals that only one of the conditions from the preceding list exists. However, that is not often the case and the SPHR frequently finds that some departments are currently staffed appropriately for future needs during the planning period, whereas some departments have too many employees and others too few. Thus, strategies of recruitment, decruitment, and retention must be developed simultaneously and interdependently

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because the recruitment objectives of one department can often serve to fulfill the decruitment objectives of another.

Yield Funnel

Employment Yield Ratios

2,000 Recruitment Contacts

500 Employment Prescreening

100 Applications

50 Tests

25 Interviews

20 Background Investigations

10 Conditional Job Offers

10 Medical Exams
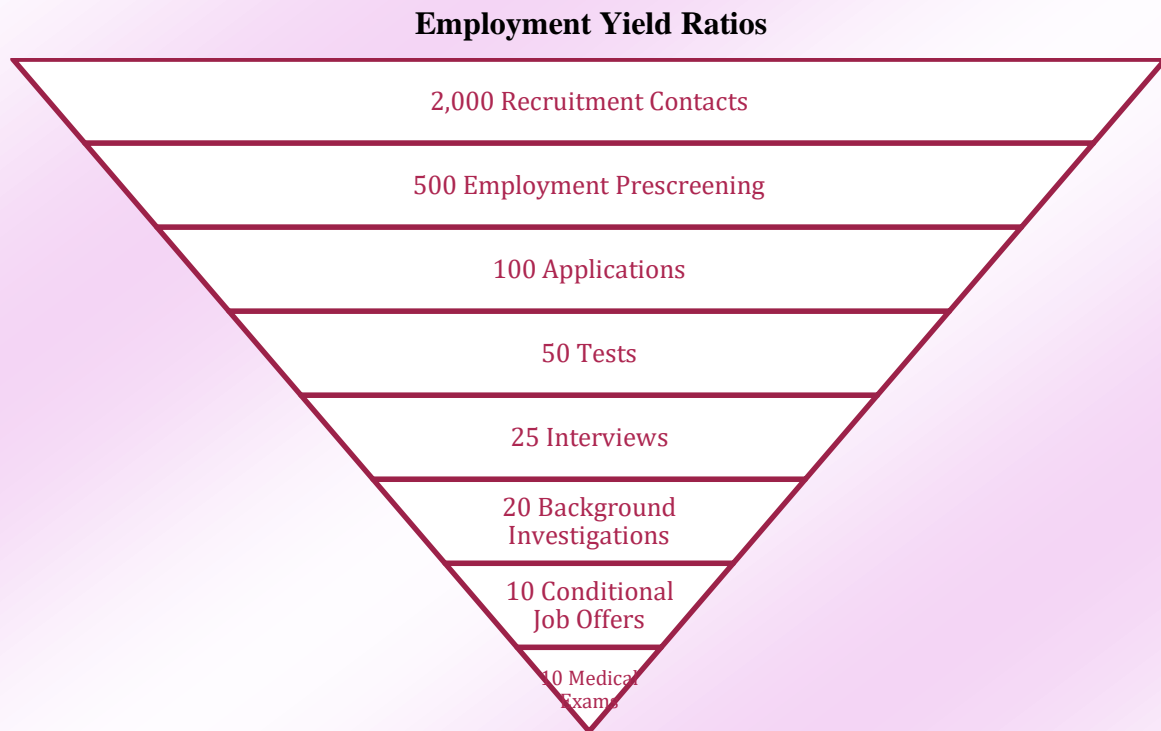
Figure 1, 10 Hires, Source: https://www.pearsonitcertification.com/articles/article.aspx?p=438037&seqNum=5 , Pearson IT Certification, 2006

This is often referred to as a yield funnel. It provides a basis for understanding two major programmatic activities - recruitment and selection. Assuming that an expansion of the workforce is required, strategy determination is affected by the forecasts of yield rates and the timeframes required for each step in the recruitment and selection process. Yield rates are a comparison of the number of applicants or potential applicants at one stage in the recruitment/selection process with the number of applicants that remain available at the next stage. To determine programmatic activities and action plans, the SPHR must work backward from the total number and types of employees that will be needed, including dates on which they will be needed. Based on experience, moderated by any projected changes in timeframes

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or yield rates, the planning process must incorporate an evaluation of the scope and timing of activities to produce the desired results.

(https://www.pearsonitcertification.com/articles/article.aspx?p=438037&seqNum=5 , Pearson IT Certification, 2006)

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VI. HR Development Plan. General provisions.

1. What is HR development?

In the early 1990s, Chalofsky defined human resource development as "...research and practice in the area of increasing the learning capacity of individuals, groups, and organizations through the development and application of learning-based interventions in order to optimize human and organizational development and effectiveness". In 1995, Swanson presented his understanding of human resource development as "... the process of developing and deploying human expertise through organizational development and training and development activities to improve performance". In the late 1990s, Armstrong defined human resource development as the activities of providing opportunities for learning and development, conducting training initiatives, incl. and planning, implementation and evaluation of training programs in the organization. According to him, human resource development is a strategic process that addresses both the needs of the organization and the individual. The main objective of human resource development is to provide the organization with the necessary human resources to improve its performance and achieve the desired growth.

Human resource development is accomplished through learning activities that prepare people to perform broader or more responsible tasks. It is also seen as a concept that reflects the employer's strategy to manage learning and training processes. In this regard, human resource development is defined as "the planning and management of learning with the aim of making the learning process more effective, increasingly efficient, appropriately targeted and useful".

The essence of the development of human resources is associated with ensuring the necessary flexibility of the company and its role as a factor for adapting to new technologies, for increasing quality, for internationalizing the business and introducing a flexible organization is emphasized. "One of the key features of the debate about the evolution of the socio-economic environment of business in advanced industrial economies is the emphasis on a culture whose core is knowledge and in which learning is a fundamental prerequisite for the survival and growth of all organizations."

In a publication by the British Institute for Personnel Development, human resource development in organizations is defined as a process that integrates activities and relationships

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related to employee learning and development. The main result of human resource development is increased organizational efficiency and stability. For individuals, the result of the development of human resources is associated with the improvement of personal competence and their adaptability and with an increase in the capacity (potential) of their workforce for realization in the labor market.

According to Harrison, human resource development is defined as "learning through a variety of forms and means where individuals and groups improve their knowledge, skills, values, or behaviors." Commenting that the concepts of "human resource development" and "learning and development" are similar in content and can be used interchangeably, Harrison points out that they reflect a process that aims to support the development of knowledge and the achievement of organizational and individual goals. This includes stimulating and facilitating learning and development processes, initiatives and relationships that take into account the differences between people in the work process.

(HUMAN RESOURCES DEVELOPMENT IN ORGANIZATION –
CONCEPTUAL FUNDAMENTALS AND RESEARCH APPROACHES Atanasova, 2012)

Human resource development is important for any organization that wants to be dynamic and grow. Unlike all other resources, human resources have almost unlimited possibilities. This potential can only be harnessed if a climate is created that identifies and supports people's capabilities.

It includes activities such as training, career development, performance management, coaching, mentoring, succession planning, organizational development and key employee identification.

According to Leonard Nadler, "Human resource development is a series of organized activities carried out over a period of time designed to produce behavioral changes."

In the words of Prof. Rao, "HRD is a process by which the employees of an organization are assisted in a continuous and planned manner to acquire or sharpen capabilities required to perform various functions related to their current or expected future roles; develop their general abilities as individuals and discover and exploit their own inner potential for their own and/or organizational development goals; develop an organizational culture in which superior-subordinate relationships, teamwork and cross-departmental cooperation are strong and contribute to the professional well-being, motivation and pride of employees.".

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According to M.M. Hahn, "Human resource development is concerned with enhancing the knowledge, abilities and positive work attitudes of all people working at all levels in a business enterprise."

Human resource development in the context of the organization is a process by which the employees of an organization are supported in a continuous and planned way to:

• Acquire or improve abilities necessary to perform various functions related to their current or expected future roles;

• Develop their general abilities as individuals and discover and use their own inner potentials for their own and/or organizational development goals;

• They develop an organizational culture where leader-subordinate relationships, teamwork and cross-departmental cooperation are strong and contribute to the professional well-being, motivation and pride of employees.

This definition of HRD is limited to the organizational context. In the context of a country or nation, it would be different.

HRD is a process, not just a set of mechanisms and techniques. Mechanisms and techniques such as performance appraisal, counseling, training and organizational development interventions are used to initiate, facilitate and promote this process in a continuous manner. Since the process has no limit, the mechanisms may need to be checked periodically to see if they are promoting or hindering the process. Organizations can facilitate this development process by planning for it, by allocating organizational resources to the goal, and by exemplifying a human resource philosophy that values human beings and promotes their development.

Human resource development is necessary for any organization that wants to be dynamic and growth-oriented or to succeed in a rapidly changing environment. Organizations can become dynamic and grow only through the efforts and competencies of their human resources. Personnel policies can keep employee morale and motivation high, but these efforts are not enough to make the organization dynamic and take it in new directions. Employees' abilities must be continuously acquired, improved and used. To this end, a "conducive" organizational culture is essential. When employees use their initiative, take risks, experiment, innovate and make things happen, the organization can be said to have an enabling culture.

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Even an organization that has reached the limit of growth must adapt to a changing environment. No organization is immune to the need for processes that help acquire and increase its capacity for stability and renewal.

The core of the concept is the development of human beings or HRD. The concept of development should cover not only the individual but also other units in the organization. In addition to the development of the individual, attention should be paid to the development of stronger dyads, i.e. groups of two of the employee and their boss. Such dyads are the basic units of work in the organization. In addition, several groups such as committees, working groups, etc. also require attention. The development of such groups should be from the point of view of increasing cooperation between people working in the organization, which leads to effective decision-making.

Finally, the entire department and the entire organization should also be covered by the development. Their development would include developing a climate conducive to their effectiveness, developing self-renewal mechanisms in organizations so that they can adjust and act pro-actively, and developing appropriate processes that contribute to their effectiveness. Therefore, the objectives of human resource development systems are to develop:

• The capabilities of each employee as a person.

• The capabilities of each individual in relation to their current role.

• The capabilities of each employee in relation to his or her expected future role(s).

• The dyadic relationship between each employee and his or her supervisor.

• Team spirit and functioning in each organizational unit (department, group, etc.).

• Cooperation between different units of the organization.

• The overall health and self-renewal capabilities of the organization, which in turn increase the capabilities of individuals, dyads, teams, and the entire organization.

The main features of human resource development can be listed as follows:

• Human resource development is a process in which the employees of the organization are recognized as its human resource. Believes that human resource is the most valuable asset of the organization.

• Emphasis is placed on the development of the human resources of the organization. It helps the employees of the organization to develop their general abilities in relation to their current jobs and expected future role.

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• Emphasis is placed on the development and best use of the abilities of individuals for the benefit of employees and the organization.

• Helps establish/develop better interpersonal relationships. It emphasizes developing relationships based on help, trust and confidence.

• Promotes team spirit among employees.

• It tries to develop competencies at the organizational level. Emphasizes on ensuring a healthy climate for development in the organization.

• HRD is a system. There are several subsystems. All these subsystems are interconnected and intertwined. It emphasizes cooperation between all subsystems.

• It aims to develop an organizational culture in which there is good senior-subordinate relationship, motivation, quality and a sense of belonging.

• It tries to develop competence at individual, interpersonal, group and organizational level to achieve the organizational goal.

• It is an interdisciplinary concept. It is based on the concepts, ideas and principles of sociology, psychology, economics, etc.

• It is formed on the well-being of employees and the quality of working life. It tries to study/identify the needs of the employees and meet them to the best extent possible.

• It is a continuous and systematic learning process. Development is a lifelong process that never ends.

Human resource development today is considered the key to higher productivity, better relationships and greater profitability for any organization. Here are some of the important benefits:

• HRD (Human Resource Development) makes people more competent. HRD develops new skills, knowledge and attitude of people in the respective organizations.

• With a proper HR program, people become more committed to their work. They are evaluated based on their performance by having an acceptable performance appraisal system.

• An environment of trust and respect can be created with the help of human resource development.

• Responsiveness to change can be created using HRD. Employees become better equipped with problem-solving capabilities.

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• It improves overall employee growth and team spirit in the organization. They become more open in their behavior. Thus new values can be generated.

• It helps to create a culture of efficiency in the organization. This leads to greater organizational effectiveness. Resources are used properly and goals are achieved in a better way.

• It improves the participation of the worker in the organization. This enhances the role of workers who gain a sense of pride and accomplishment while performing their work.

• It helps in gathering useful and objective data about employee programs and policies, which further facilitates better HR planning.

Therefore, it can be concluded that HRD provides many benefits in any organization. So, the importance of the concept of HRD should be recognized and given an important place to face the present and future challenges in the organization.

(Human Resource Development,Whatishumanresource.com, 2023)

Recent changes in the concept of human resource development

In the past, the entire focus of any human resource department was to pick and maintain the right person for the job. Development programs and policies were one-size-fits-all approaches to keeping the workforce's hard skills up to speed. However, this has changed recently.

Now the aim is to match the individual needs with those of the organization and provide internal support so both can accomplish their goals. This entails creating a growth culture with programs and policies that promote up-skilling and development.

HR must also help build a more agile and resilient workforce to adapt to the changing work environments. This new approach represents the company's effort to contribute to the development of the individual and the organization.

What are the 7 elements of human resource development?
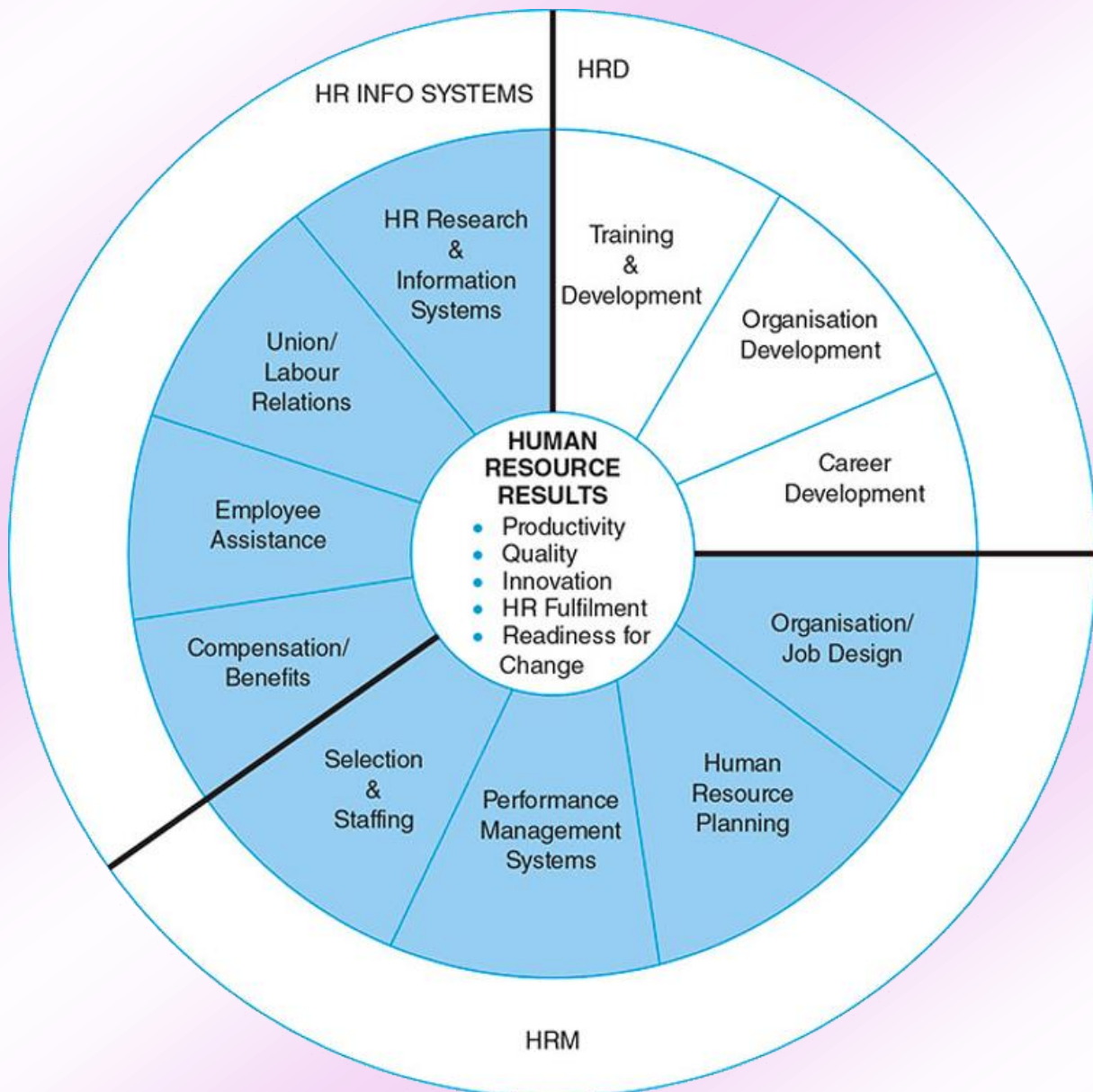
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Figure 2,

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In an HR department, there are seven key human resource development functions:

- Manpower planning, recruitment, and retention

Strategic staffing is the foundation for building a qualified workforce. Manpower planning, recruitment, and retention are top among human resource management concerns and critical to long-term business success.

While HR departments should aim to recruit and retain the best possible candidates, it's important to remember they may not be the candidate with the most experience.

Employee development will help close any skills gaps, so when you're forecasting and planning your human resource needs, don't rely on finding the right person or tapping into the right talent supply. Plan for development that can help you attract and retain them as well, especially in these competitive labor markets.

- Succession planning and talent management

Development programs can also help future-proof your organization's productivity through succession planning. This talent management strategy involves identifying critical roles across an organization and training employees to take on these positions in the future.

Organizations will always experience turnover. Formal succession training and informal career coaching are effective contingency planning strategies to ensure your workforce will always have someone on hand with the knowledge and skills to perform critical tasks.

These strategies for talent management have the added benefit of engaging employees with their own growth and can help foster relationships between employees:

- Policy and procedures

HRD requires identifying the needs of your business and developing suitable policies and procedures to meet them. This is achievable through a cycle of creating, launching, monitoring and improving initiatives for development.

HR departments must engage in collecting feedback and reporting on these policies and procedures to be certain their initiatives meet the needs of employees as well as organizations and their own departmental goals.

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As part of the information gathering and planning stages, be sure to define these goals and measurements so you can launch your initiatives successfully.

° Performance management system

A performance management system aims primarily to ensure your workforce's alignment with your company's strategic goals. Such systems combine methodologies and technologies that measure and develop employees' performance.

They are effective tools for continuously monitoring and improving development plans, as well as other aspects of performance management. HR professionals need to understand their system's capabilities and define procedures for using them for development.

° Compensation and benefits program

Compensation and benefits refer to two distinct concepts. Compensation refers to the cash return employees receive in the form of salaries or wages. Benefits, or fringe benefits, are the various forms of non-cash rewards.

HR teams can use both to provide professional development opportunities through funding for classes, procurement of learning platforms, or the creation of internal training.

On top of their wages, your employees want peer recognition, autonomy, and other perks. Development opportunities are among one of the top perks applicants are seeking.

Therefore, following a solid human resource development plan can lure great talents who seek ongoing learning opportunities. This way, you can attract, maintain, motivate, and support your employees.

Employer brand communication and employee engagement

Employer branding is the process of creating a company profile or brand that attracts future employees. Human resource development enables you to let your employees do the branding for you.

Interestingly, you can't create a powerful employer brand without investing in your current employees. We recommend that you establish a healthy culture of inclusion, trust, engagement, and diversity. This way, your employees can do the branding for you.

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(What is Human Resource Development (HRD)? 2023 Complete Guide | Workhuman ,

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2. Types of HR Development

Regardless of the diversity in the emphases of their understandings, the development of human resources in organizations is presented as a purposeful change of the knowledge and skills of employees to achieve a higher level of individual and organizational performance. In this sense, the development of human resources in the organization is understood as a purposeful change of the qualities of the human capital of the employees, which takes place in the individual and in a certain organizational context. This emphasizes the shared responsibility of the individual and the organization in this process.

In the first group of opinions, the emphasis is on the process of improving the skills of the employees in the organization and, on this occasion, its essence, stages, factors and organizational context are analyzed. This group's understanding of the nature of human resource development in the organization is dominated by the statements of the resource view of the firm, which examines the application and combination of organizational resources as key factors in achieving sustainable competitive advantage. The two main propositions of this theory are related to the heterogeneity of resources (each firm operates with a unique combination of resources) and the relative difficulties in their transfer (some resources that are characteristic of the organization are difficult or expensive to imitate, and their supply is inflexible). In this regard, it is emphasized that each company is distinguished by its unique combinations of resources because these are the result of its specific historical experience in relation to the process of acquisition, construction and maintenance in the context of a specific environment. The emphasis is on the need for an organization to build a valuable pool of resources and bring them together in a unique and dynamic way to achieve success.

Organizational resources are considered as diverse assets that are a prerequisite for the company's ability to build and implement strategies to increase its effectiveness, efficiency and competitiveness. Competitive advantage does not depend only on natural resources, technology and economies of scale (as is the traditional view), as these are increasingly imitable.

The resource-based view of the firm emphasizes three types of resources available to the firm itself: material resources; intangible resources (relatively harder to imitate than competitors because they are embodied and embedded in unique practices with a specific genesis) and organizational capabilities. When defining the scope and content of organizational capabilities

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in the specialized literature, the authors indicate the set of competencies, knowledge and skills that the firm uses to transform certain resources into a given result, and in this regard it is emphasized that they reflect the organizational capacity to combine of tangible and intangible resources to achieve certain goals. One of the central ideas of the resource view of the firm is that the combination, type, amount, and nature of the firm's available resources underpin sustainable competitive advantage. In the conditions of increasing global competition, companies increasingly rely on their ability to define, develop and use specific company competencies that are the basis of their growth.

Organizational resources, which are a source of sustainable competitive advantage, are distinguished by a number of features - they are rare, valuable, irreplaceable and extremely difficult to imitate. These organizational resources are characterized by a strong connection with the particularities and development of the organization due to the fact that: they develop and accumulate in the organization and do not exist outside it in a ready-to-use form; are created on the basis of the learning process in the organization; are characterized by limited transferability and applicability to other organizations; their development depends on the organizational context - on the level of the learning process in the organization, on investments, on stocks and on previous activities in the organization.

Within the resource view of the firm, the knowledge and skills of the people in the organization are characterized by specific characteristics that shape their potential as a source of sustainable competitive advantage. "People's skills (by type and level) are not evenly distributed - some firms can acquire the talent they need and others cannot. Therefore, all other things being equal, this form of human capital can be a source of sustainable competitive advantage." This means that sustainable competitive advantage is based on organization-specific knowledge that cannot be found and acquired from the external labor market in a ready-to-use form. In the context of the resource view of the firm, it is concluded that the availability of human capital, which is irreplaceable and difficult to imitate, is the basis of a firm's sustainable competitive advantage. Human capital theory contributes to a deeper understanding of the development of human resources in the organization with a number of key findings regarding the distribution of benefits and costs between employer and employee regarding in-service training and its main varieties - training leading to the acquisition of company-specific and general skills (differing mainly in the degree of applicability outside the organization). In the context of human capital

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theory, two main types of on-the-job training are analyzed: general training and specific training.

General training aims to improve general skills that are common in the labor market and are a prerequisite for increasing productivity in a wide range of organizations. Specific training leads to the improvement of skills that are applicable primarily within the relevant organization and is a prerequisite for productivity growth only in the company where it was acquired, and outside this company it does not bring benefits to the worker.

In reality, in-service training is a combination of general and specific training, but from a conceptual point of view, the differences between general and specific training are examined in depth. The theory of human capital substantiates the role and place of the employer and the employee as investors in on-the-job training and reaches a number of conclusions that are key to understanding the nature of human resource development in the organization. Differences in the interests of employer and employee regarding investments in general and firm-specific skills are clearly outlined. The employer has an interest in investing in company-specific skills that create conditions for productivity growth in the organization, have no applicability outside the company, and therefore create prerequisites for a relatively long-term return on this investment. The opposite is true for the employer's position on investments in general skills that have broad applicability outside the organization.

Research highlights that human resource development differs from the traditional approach to staff training in four main areas: closer alignment with business strategy, increased responsibilities of line managers to implement human resource development, a new attitude and motivation of employees and managers, an emphasis on on-the-job learning rather than off-the-job learning. The philosophy of human resource development suggests a move from a position where learning is based on learning in isolated courses to an understanding of learning as everyday life. In connection with the diversification of ways and situations, which are a valuable source for enriching people's knowledge and skills, various forms and methods of learning are systematized in the specialized literature, among which the distinction of three main groups of learning is gaining wide popularity: formal, informal and independent study.

Formal learning covers those forms and methods of learning that take place in an organized and structured environment (in a educational organization/training center or in the workplace) and are explicitly labeled as learning (in terms of objectives, time or resources). Formal learning

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usually leads to obtaining a diploma or certificate. Informal learning covers forms and methods that are not associated with an organized and structured environment (in terms of objectives, period and support of the learning process), but contain an essential learning element. Self-directed learning encompasses learning situations resulting from everyday activities related to work, family or leisure. It is not organized or structured in terms of goals and time, but has great potential as a form and method of enriching human capital.

In the ever-changing organization, the relative share and importance of cases in which a person learns (improves his/her knowledge, skills, attitudes, behavior) in the process of his/her work activity is increasing, incl. and in communications with the people they meet in the performance of work tasks. In this sense, the combination (in time and space) of work performance and learning activities stands out more and more clearly. People in the organization are seen not only as workers but also as learners in the process of work. Their work tasks are also perceived as a space in which they enrich their knowledge, skills, experience, competences and where a learning process takes place. In this regard, qualities and behaviors characteristic of individuals who successfully integrate learning into their daily work are studied and systematized: observe the work behavior and performance of others and derive useful experience; seek feedback on their work; listen to other people's arguments; learn from other people's mistakes; they seek to understand the answers to the questions that interest them; realistically assess what they know about a subject; collect and use other people's ideas; independently seek and find areas in which to enrich their knowledge; contact outside the immediate work environment to find the information they need.

The variety of opportunities provided in the organization for improving knowledge and skills and the use of these opportunities depends on a number of factors, among which the content and nature of the performed work tasks traditionally occupy a place. From the perspective of the characteristics and content of work tasks, work is seen as a space in which the performer can learn on the job, accessing valuable information with the potential to enrich her/his knowledge, skills and attitudes. In this regard, the content of the work is analyzed in two main dimensions - scope and depth.

The scope of work - as one of the important characteristics of the content of work, reflects the number and variety of work tasks performed by the worker. In narrow-scope work, the worker performs a small number of relatively short work tasks that are continuously repeated. These

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types of work tasks are quickly learned and have relatively limited potential as a space for learning and enriching the contractor's knowledge and skills.

Depth of work refers to the freedom of the contractor to plan and organize his/her own work, to the possibility of relatively high mobility of contacts in its execution. Positions with a relatively high depth of work include work tasks that require independent planning and organization of part of the activities, consideration of the wider context of the tasks and their influence on other units, own assessment of the quality of the performed activity and dealing with unpredictable situations. This type of work requires relatively longer training and has potential as a space for learning and enriching the contractor's knowledge and skills. A position can be broad in scope and yet shallow in depth, and vice versa.

Job enlargement can be seen as a process in which new tasks are added to the worker's job duties, as a result of which the scope of the job is expanded. In this way, the number of work tasks within the job is increased so as to reduce repetition and routine over a period of time. The worker has a relatively comprehensive work task and conditions are created for the growth of his/her interest and the opportunities for acquiring new knowledge and skills are increased, incl. and through professional and social contacts in the labor process.

Hackman Oldham 's model presents the relationship between the content of the job and some essential psychological states of its executor, which have a significant impact on the worker's job satisfaction and motivation. The key characteristics of the job - variety of work tasks, integrity, significance and autonomy, and, accordingly, the provision of feedback on the achieved results, have an impact on the formation of psychological states and feelings that determine internal motivation, the level of job satisfaction and productivity.

The existence and effective functioning of the learning organization, according to Senge (1994), is based on five main characteristics:

1. Personal excellence (Developing the capacity to clarify and achieve what is most important to us). Individuals in the organization learn to increase their personal capacity to achieve the results they desire. Workers and employees create an organizational environment that encourages all colleagues to develop and achieve their goals.

2. Mental Models (Developing the capacity to understand our internal representations of the external world and how they shape our thinking and actions). People's individual perceptions of processes and systems within the organization (and beyond) are continually becoming clearer

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and more complete, and people increasingly understand the influence of these individual perceptions on actions and decisions.

3. Shared vision (Development of the organization's ability to create a meaningful and widely accepted direction for action) Individuals in the organization form a shared vision for a desired future state of the respective community and the principles for moving towards it; build a sense of commitment to a particular work group/activity.

4. Learning and working groups (Development of capacity for collective understanding/cognition and productive communications) The necessary mental potential exists in the organization, providing an opportunity for certain working groups to form (develop) an ability that is greater than the sum of the individual abilities of their individual members.

5. Systems Thinking (Developing the capacity to see the whole system, perceive long-term patterns, understand interdependencies and consequences) The way of thinking and the language used to describe and understand the driving forces and relationships in the organization are aimed at shaping the behavior of systems. This helps managers and workers in the organization to change systems more effectively, taking into account the peculiarities and constraints arising from external factors and conditions. These characteristics create the conditions for "the learning organization to continuously increase its capacity to create its own future, not just to survive."

The systematization of the main characteristics/principles of the learning organization reveals it as an ideal model of an organizational environment that promotes and supports learning. During its formation and updating, the peculiarities of the content and organization of work, including its cognitive characteristics, are taken into account. Changes taking place in the content and organization of modern work are driving changes in required abilities, with demand for generic (problem solving, communication and teamwork) and technical abilities predicted to increase in the future. Generic abilities are characterized by broad applicability and are transferable between individual positions and organizations. Technical abilities are required for a certain profession and cover academic knowledge of certain tools and processes, but at the same time, a large part of them are usually codified in standards of the relevant sector (activity) and are acquired in the work process.

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The development of human resources – improvement of knowledge and skills in an organizational context

The theoretical statements about the essential characteristics of the development of human resources in organizations reveal possibilities for its analysis as a process which, on the one hand, manifests itself as improvement (targeted change) of the knowledge, skills and attitudes of the employed, taking place in individuals, but in a certain organizational context, and, on the other hand, as transforming resources into a result useful both for individuals and organizations, as well as for society. In doing so, the development of human resources in organizations is seen as a multi-level process characterized by certain components that can be identified, monitored and analyzed. At the core of the concept of human resource development is the process of improving the knowledge and skills of employees in an organizational context. From these positions, the analysis focuses on the specific goals, activities and factors that are associated with two main levels of the process of improving the knowledge and skills of the employees in the organization - from the point of view (perspective) of the individual, and from the point of view (perspective) of the organization.

When determining the needs for improving the knowledge, skills and attitudes of employees in the organization, the level of work performance is analyzed and those gaps in it are identified, which are related to a deficit in the competences of the contractors. Preparing and using the learning opportunities provided in the organization requires decisions to be made about the learning methods provided and the resources that are needed to do so.

The various learning opportunities provided to employees in organizations are systematized in the specialized scientific literature according to various criteria, the most widespread being three - place and time of their application/use and number of participants. In connection with this, a number of varieties of learning practices applied in organizations are distinguished , and each of them - depending on the number of participants, can be individual or group. Without denying the importance and effectiveness of traditional staff training methods, organizations are paying more and more attention to some modern methods in this regard: multimedia interactive training, intranet-based training resources, participation in higher project working groups, professional networks and organizations, in conferences and workshops, etc.

Multimedia interactive learning is becoming more and more popular, along with the development of computer equipment and technology. Through programmed instructions, the

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learner can consistently master certain parts of knowledge and skills on a given issue at a time and place convenient for him/her. This method of learning is increasingly preferred by organizations and in many cases is an element of intranet-based training resources provided to employees. In the intra-organizational information system, specialized training materials selected or developed and updated (usually) by the managers are presented, which are aimed at those employed in the relevant structural units - for example: new regulations, instructions, regulations, methodologies, etc. At a time convenient for them, employees can independently familiarize themselves with the necessary information, improve their knowledge and skills and increase their professional abilities. In a number of organizations, the period in which the relevant training material must be mastered is indicated, and managers periodically evaluate (for example, through specially developed tests) their associates in this regard. Participation in project working groups, in professional networks and organizations, in conferences, etc. is seen as a valuable source for obtaining up-to-date information and new ideas in the relevant field. During periodic communications and meetings, participants have the opportunity to exchange information with their colleagues, listen to specialists and experts.

The development of human resources in organizations - transforming resources into a useful result for the individual, the organization and society

The development of human resources in the organization is considered from the positions of the system approach, in which the starting principles for identifying, monitoring and analyzing both the invested resources and the transformation processes and the achieved results are outlined.

The resources that are invested in improving the knowledge, skills and attitudes of the employees in the organization are considered as a heterogeneous set, encompassing diverse in nature (financial, time, informational, etc.) resources that are invested in preparation and creation of opportunities for learning (through the whole range of forms) of the employed; costs of paying workers who do not work during the training period; personal finances and time that individual participants invest in various forms of learning.

A certain part of the invested resources is relatively difficult to fully and accurately identify, such as: the funds that the organization spends to create prerequisites for the participation of employees in project work groups, to apply job rotation, to build and maintain intranet training resources and access to them, etc. These features are taken into account both when examining

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the resources invested by the organization and the individual, and when interpreting official reporting data in this area.

In the context of understanding the development of human resources in organizations as a process that takes place in the individual, but with shared responsibility between the individual and the organization, the invested resources are systematized into two main groups: resources that are invested by the organization and resources, which are invested by the individual. In the group of resources that are invested by the organization, two main elements are outlined: financial resources for creating and maintaining learning opportunities in the organization (conducting seminars and courses, building and maintaining training resources, costs for participation in professional meetings, conferences, costs for stimulating mentors, costs for maintaining training centers and units, etc.), and costs for paying workers who do not work during the training period.

In the group of resources that are invested by the individual, two main components are also outlined: personal financial costs for providing access to learning (learning materials, fees, information and technical means in connection with access, etc.) and personal time, necessary for familiarization with new training materials, participation in courses and seminars, working project groups, conferences, etc. These resources are transformed in the organization in the process of actual participation of employees in diverse learning opportunities. In specialized studies, various terms such as "process", "performance", "transformation" are used to denote this component.

One part of the forms of learning that are used to improve the knowledge and skills of employees is relatively difficult to fully and precisely identify and monitor - especially informal learning from everyday work experience and self-directed learning. These features are taken into account both when studying the applied forms of learning by the employed and when interpreting official reporting data in this area. The direct result of the development of human resources in organizations is manifested in the achieved degree of improvement of the knowledge, skills and attitudes of the employees. This is a prerequisite for an increase in the level of performance of both the organization (increase in revenue, profits, competitiveness, etc.) and the individual worker (increase in income, moving to a higher position, etc.). On this occasion, the research emphasizes the difference between the direct results of human resource

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development in the organization and its subsequent effect on the performance of the organization and the individual.

At the organizational level, the direct results are manifested in an increase in the number and relative share of workers with higher levels of knowledge and skills. At the level of an individual, the direct results of the development of human resources in organizations are associated with an increase in the capacity of the employed for better realization in the labor market and are analyzed from the positions of the specific role and responsibilities of the worker in the learning process. The direct result of participation in various forms of learning manifests itself (or should manifest itself) in the official recognition of the new, changed competences of the individual - the acquisition of a certificate that recognizes and validates the new state. In connection with this, the question is raised about the main approaches for measuring changes in the knowledge, skills and attitudes of the employed (as a result of certain interventions through various forms of learning), which are systematized into two main groups: measurement by applying the adopted degrees in the education and training system and measurement by the duration of the relevant training.

The first approach is based on a pre-built knowledge and skills assessment system and is widely applied to measure changes in already acquired knowledge and skills that take place in the formal stages of the education and training system. The literature emphasizes the importance and validity of this approach to measuring the direct outcomes of the learning process. At the same time, the need to introduce appropriate methods and tools for measuring, evaluating and certifying the changes in the knowledge and skills of the employed, which occur as a result of informal and independent learning, is widely discussed and debated.

The task of building an institutional infrastructure for the validation of knowledge and skills in the work process is a key element of the European lifelong learning strategy. In Bulgaria, this task is a component of both the National Pathway for Flexibility and Security and the National Strategy for Lifelong Learning. In the National strategy for lifelong learning 2008-2013 - as part of the priority direction for ensuring quality and efficiency of education and training, the task is stated: creating opportunities for validation and certification by the system of formal professional education and training of professional knowledge, skills and competences acquired through non-formal and independent learning. In practice, still a relatively limited part of the

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trainings that takes place in the enterprises is accompanied by procedures for certification of the acquired knowledge and skills.

European Qualifications Framework and the concept of lifelong learning

In the conditions of dynamic changes in the forms and methods of improving the knowledge and skills of employees at the modern stage, learning in organizations is considered in connection with the concept of lifelong learning and expanding the opportunities for recognizing qualifications acquired in the process of informal learning. Increasing the attractiveness and accessibility of training in the employment process is considered a key factor for improving the knowledge and skills of the employed and is included as a component in the main strategic documents of the European Union for the development of employment and human resources: the European Employment Strategy and the European "Education and Training 2010" program (European Council conclusions on a strategic framework for European cooperation in the field of education and training, Official Journal of the European Union, 28.05.2009; An updated strategic framework for cooperation in education and training, COM(2008) 865, Brussels, 2008).

Within the framework of the European Employment Strategy, continuing vocational training in enterprises is an important factor both for increasing the quality of employment and for increasing the adaptability and mobility of the workforce in the conditions of the growing spread of flexible forms of employment. Improving the knowledge and skills of the employed through various forms is an essential aspect in the content of the European program "Education and Training 2010", along with the formal degrees of education - primary, secondary and higher. The increase in the mobility of the labor force is associated with the need to build appropriate tools for the mobility of the acquired educational and qualification degrees, and in this connection the task of harmonizing the national qualification systems in accordance with the adopted European Qualifications Framework is set.

"The European Qualifications Framework is a common European reference framework that establishes links between national qualification systems, fulfilling the function of a tool to explain the content and increase the comprehensibility of qualifications in different countries and systems in Europe." (European Qualifications Framework for Lifelong Learning, Luxembourg: Office for Official Publications of the European Communities, 2009, p. 3, The Recommendation for the European Qualifications Framework officially entered into force in

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April 2008). The European Qualifications Framework covers eight reference levels, which include the full range of qualifications – from basic level (level 1, e.g. Leaving Certificates or Level of School Education), to advanced levels (level 8, e.g. PhD).

As a tool to promote lifelong learning, the European Qualifications Framework includes all qualification levels acquired within general, vocational as well as academic education and learning. In addition, the European Qualifications Framework also includes qualifications acquired within initial and continuing education and training. A key objective of the European Qualifications Framework is to increase mutual trust between the various stakeholders involved in lifelong learning. This is considered a necessary precondition for removing barriers to learning and making better use of existing knowledge, skills and wider competences.

In this regard, the European Qualifications Framework performs functions in the following main areas: it creates and presents baselines for learning outcomes and levels of competence and facilitates communication between education and training providers and learners; a translation tool that creates opportunities for positioning and comparing learning outcomes both at national and European level; formation of general recommendations for quality assurance and development of education and training; providing support for change at European, national and sectoral level within the perspective of lifelong learning; enabling citizens to navigate within (and between) complex systems and determine their learning outcomes; direct support to authorities and institutions responsible for education and training and to other providers, enabling them to place and compare their offers in this area.

The eight reference levels are represented by learning outcomes, which are described in three categories: knowledge (theoretical and/or factual), skills (cognitive and/or practical) and competences. In the context of the European Qualifications Framework, competences are understood as a proven ability to use knowledge, skills and personal qualities. In the set of competencies, the following main groups are outlined: cognitive competencies, including the use of theories and concepts, as well as independent (hidden) knowledge acquired through experience; functional competencies (skills) covering what a person should be able to do in a given area of work, study or social activity; personal competences, including knowledge of how to behave in a specific situation; ethical competences, including the possession of certain personal and professional values. The acquisition of a certain level of competence can be seen

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as an individual's ability to use and combine his/her knowledge, skills and wider competences according to the diverse requirements arising from the specific context, situation or problem.

Eight key competences (basic skills) have been determined, which are the basis for successful professional and social realization and integration of the personality: communication in native language; communication in foreign languages; mathematical competence and basic knowledge in the field of natural sciences and technologies; digital competence (information and communication technologies); study skills; social and civic competences; initiative and entrepreneurial skills; competences in the field of culture and creative performances. These competences must be acquired at the end of compulsory education and training and maintained through lifelong learning.

The European Qualifications Framework pays special attention to quality assurance, validation of non-formal and independent learning, guidance and counseling. Training quality assurance systems aim to increase the efficiency and transparency of the activities carried out, mutual trust, recognition and mobility of the acquired qualification levels within and between individual countries. Training quality assurance activities are based on several basic principles: quality assurance policies and procedures must cover all levels of education and training systems; quality assurance should be an integral part of the internal management of education and training institutions; quality assurance should include regular evaluation of institutions or programs by external institutions or monitoring agencies; external quality assurance monitoring institutions or agencies should also be subject to regular inspections; quality assurance should include context, input, process and output dimensions, emphasizing output and learning outcomes; quality assurance systems should include: clear and measurable objectives and standards; implementation guidelines, including stakeholder engagement; relevant resources; consistent assessment methods including self-assessment and external review; feedback mechanisms and improvement procedures.

Validation of non-formal and informal learning is defined as the process of assessing and recognizing a wide range of knowledge, know-how, skills and competences that people develop throughout their lives in different environments, for example through education, work and leisure activities. The procedure for recognition of acquired knowledge and skills against certain requirements for level/degree/stage of education and/or professional qualification ends

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with the issuance of an officially recognized document for the degree of education and/or professional qualification.

 A certain type of validation procedures enable the recognition of key competences acquired and developed in informal and/or self-directed learning. Knowledge and skills in a part of a profession and/or individual study modules can also be validated, which leads to the upgrading of competencies and the transfer of credits. Validation is one of the main mechanisms for ensuring mobility and transparency of qualifications. Most European countries are in the process of developing and implementing methods and systems for validating non-formal and independent learning. This enables an individual to gain a qualification based on learning undertaken outside of formal education and training. Validation processes should be carried out respecting a number of principles: validation of non-formal and informal learning should be voluntary for the individual, ensuring equal access and fair treatment; stakeholders and institutions should establish (in accordance with their rights, responsibilities and competences) systems for defining and validating non-formal and informal learning, which include appropriate mechanisms for quality assurance and for providing guidance, consultation and information on these approaches; security and trust, requiring that the processes, procedures and criteria for determining and validating non-formal and informal learning are fair, transparent and supported by quality assurance mechanisms; credibility and legality, which require that the systems and approaches for determining and validating non-formal and informal learning are consistent with legitimate interests and ensure balanced participation of stakeholders, and the assessment process must be transparent and fair.

Achieving the challenging objectives in the European Strategy for Smart, Sustainable and Inclusive Growth requires stepping up efforts and strengthening the effectiveness of actions in the area of increasing the quality, adaptability and mobility of the workforce as a key factor in building an economy based on knowledge and innovation, which is characterized by high levels of employment and social and territorial cohesion. Targeted improvement of people's knowledge and skills as a prerequisite for their successful professional and social realization and integration is a traditional element in the main strategic documents of the European Union in the field of employment, education and training, explicitly stating that the aim is to counteract segmentation and increase opportunities for people to improve their workforce.

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Within the framework of the national lifelong learning strategy, special attention is paid to workplace learning as an important prerequisite for achieving better business results and increasing productivity. In connection with this, it is planned to develop and implement modular programs for the achievement of effective in-house training and for training at the workplace with the aim of: supporting the development of key competencies; learning new skills, techniques, technologies and processes; expanding the possibilities of introductory training; improvement of the company policy regarding the adaptability of human resources. The growing role of key competences in the lifelong learning process is linked to their influence on the processes of increasing competitiveness, productivity and innovation at a national scale. The strategy envisages both raising awareness and creating conditions for the acquisition of key competences, as well as research and dissemination of good practices in the acquisition of key competences: inclusion of key competences in the development of the National Qualification Framework; introducing the acquisition of key competences in education and training; development and implementation of national programs for adults aimed at the acquisition of key competences; development of mechanisms for validation and certification of acquired key competences and their regulatory regulation.

(https://www.unwe.bg/uploads/Yearbook/Yearbook_2012_No5_M%20Atanasova.pdf ,
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3. Benefits of the HR Development Plan

Human resource development is a major contributor to the well-being of any organization. It can be key to a stronger workforce, better relations, higher productivity, and profitability. Below are some of the benefits of the HR Development Plan:

➢ Attracting only the best

A company's human resource development plan can be a major attraction to the best employees in the market. Generally speaking, career-oriented employees are always in search of new opportunities to develop and sharpen their skills.

➢ Increasing loyalty and satisfaction

The goal isn't only to attract but also to retain talents. Job markets are incredibly dynamic. Therefore, you need to keep an edge to keep your ideal employees. This can be done by investing in them through human resource development opportunities.

Encouraging and improving your employees can be crucial to increase their loyalty and job satisfaction. As such, they're more likely to remain in the organization..

➢ Prepare for the future

Human resource development helps prepare employees for future posts. It allows them to develop new attitudes, skills, and knowledge to take on leadership positions.

On top of that, it helps you identify your employees' strengths and weaknesses to create effective company succession planning strategies.

➢ Raise the bar

Constant training and development can boost the performance level for the entire organization. In other words, a well-trained workforce excels and thus raises the business itself.

That's mainly because human resource development fosters commitment and alters their attitude towards change with their new enhanced capabilities.

➢ Fostering healthy relations

Investing in human resources can be a great way to foster healthy relationships in the workplace. In short, creating an encouraging and ongoing learning environment increases a sense of respect and trust between you and your employees.

Moreover, such development plans promote the employees' participation. This, in turn, enhances team spirit, allowing for a healthier workplace.

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(What is Human Resource Development (HRD)? 2023 Complete Guide | Workhuman
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4.   Steps to creating an HR Development plan

4.1. Identification of aspects that need improvement

Start by conducting a needs assessment among the educational organization staff to identify the areas where they need improvement or additional skills. This can be done through various methods such as surveys, interviews, and observation.

Employees can begin to develop an HR development plan by analyzing the organization's team of employees and assessing their strengths, weaknesses and skill sets. Members of a company's HR department may assess the value and potential of the organization based on the size of the staff and employee performance, qualifications and competencies. This can help them identify aspects of the company that may benefit from improvement. They may consider which skills team members still require or struggle with and discuss the kind of support that may increase employee efficiency or satisfaction.

(What Is HR Development (And How To Create a Plan) | Indeed.com Northup, 2023)

Start with analyzing your strengths and weaknesses with a magnifying glass. The aim? To create an employee skills inventory and perform a gap analysis. What skills are in demand? Who could be upskilled or reskilled? You'll want to review the processes you have in place and the ongoing (current and new) employee training and development programs.

According to McKinsey, 50% of leaders are mainly facing business problems due to unforeseen skills gaps. The majority believe that upskilling and reskilling are the crux of the solution, yet only 13 percent feel confident about implementing them.

Begin with reviewing your resource management software. Is it up to scratch? Do you get the necessary resource visibility, down to skills, competencies, allocations and utilization levels?

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As you review, ask the following questions:

- What are the current employee expenses? What tools do they use and what benefits do you offer them?
- How many people are you working with, in what departments, and what are their top skills?
- What processes do you have in place for improving the company culture and retaining employees?
- Do employees have a career development plan?
- Are you investing in improving their skills?

It's also a helpful idea to review job descriptions. Analyze whether they accurately reflect the nature of the job — both in terms of the work involved and how well they meet new employee expectations.

By doing all of this, you can pin down areas for future needs and training programs to improve the current employees.

This will assist in understanding your business's demand for employees and their supply — within their company and outside of it. From there, you'll want to strategically manage the demand and supply.

Let's look at these two pillars for creating the strategic human resource plan:

- Demand forecasting. This involves determining the need for potential employees. It answers how many employees to hire (quantity) and what talent caliber you need (quality) to meet your organization's present and future needs.
- Supply forecasting. This determines the current employees available to meet the demand you outlined above. A skills inventory helps with this. Depending on your current and future demand, you'll also want to start looking outside your company for potential new hires who can help fulfill your business needs and goals.

Once done, you'll find yourself in the challenging work of matching demand and supply. But what makes it challenging, you ask? Because the answer to meeting demand isn't always a new hire. Instead, you can also match it by training current employees.

(https://www.runn.io/blog/human-resource-planning-hrp Viter, 2023)

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4.2. Definition of the desired results

Once the training needs are identified, establish clear and specific goals and objectives for the development plan. These goals should be aligned with the overall strategic goals of the educational organization.

After identifying how the company or employee team may improve, members of the HR team can define the results they hope to yield after implementing an HR development strategy. Recognizing a clear goal can help HR employees and employees stay focused and understand the purpose of the activity or program. The purpose of an HR development plan may be to encourage employees' skill acquisition, create a larger team of managers or ensure that all employees perform tasks that align with their professional strengths.

(https://www.indeed.com/career-advice/career-development/what-is-hr-development Northup, 2023)

Effective human resources planning goes beyond workforce planning. It goes on to improve hiring processes and take steps to improve the company culture and employee satisfaction. A useful way to get started is by putting processes in place. These ensure uniformity and consistency.

For example, by having an onboarding process in place, you can make sure all new hires have the same positive experience and are happy to jump into working with your company.

Processes also ensure that everyone knows what to expect, minimizing surprises and keeping the business running smoothly.

To get started, go back to the review you did on the processes your organization has in place. Now, create a list of which ones you don't have. Begin work from there. Some ideas for essential processes to have in place include:

- Employee retention;
- Employee relations;
- Talent development;
- Performance management;
- Employee remuneration and benefits administration.

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You'll also want to audit the prevailing processes. Find out how effective they are, where there are roadblocks, and identify ways to improve them too.

Strategic resource planning helps you not only retain qualified employees, but it also helps you meet business goals and grow the agency further.

Before HR professionals can map out how the existing employees and future resources will help meet these goals, you need a strong grip on where the business is headed.

To this end, excellent alignment between the company leadership and the HR department is crucial. Sit down with the key roles in the company including the CEO and CFO to learn about the:

- Company growth plan
- Business strategy and vision
- Short and long-term goals

This will help you understand the skills needed to spur company growth.

(https://www.runn.io/blog/human-resource-planning-hrp Viter, 2023)

4.3. Selection and implementation of an HR development method

Based on the information they identified about the company and its employees and the goals they defined, HR employees can select the HR development approach that addresses their concerns and may have the greatest positive impact on the organization. They can then integrate this HR development method and may collaborate with other departments if necessary.

This may involve assessing the organization's budget and resources, particularly for a development strategy such as tuition assistance. If using a leadership method, such as an employee coaching or mentorship program, they may contact leadership employees to discuss potential opportunities.

(What Is HR Development (And How To Create a Plan) | Indeed.com Northup, 2023)

During the third phase, the implementation phase or execution phase, the project plan is put into motion and the work of the project is performed. It is important to maintain control and communicate as needed during implementation. Progress is continuously monitored in order to make appropriate adjustments as required, which are then recorded as variances from the original plan. In any project, a project manager spends most of the time in this step. During

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project implementation, people are carrying out the tasks, and progress information is being reported through regular team meetings.

The project manager uses this information to maintain control over the direction of the project by comparing the progress reports with the project plan to measure the performance of the project activities and take corrective action as needed. The first course of action should always be to bring the project back on course (i.e., to return it to the original plan). If that cannot happen, the team should record variations from the original plan and record and publish modifications to the plan. Throughout this step, project sponsors and other key stakeholders should be kept informed of the project's status according to the agreed-on frequency and format of communication. HR would support the team designing a Communication Plan, and help to monitor the plan to ensure success. The plan should be updated and published on a regular basis for all stakeholders.

Status reports should always emphasize the anticipated end point in terms of cost, schedule, and quality of deliverables. Each project deliverable produced should be reviewed for quality and measured against the acceptance criteria. Once all of the deliverables have been produced and the customer has accepted the final solution, the project is ready for closure.

After you have carefully planned your project, you will be ready to start the project implementation phase, the third phase of the project management life cycle. The implementation phase involves putting the project plan into action. It's here that the project manager will coordinate and direct project resources to meet the objectives of the project plan. Human Resources could play a role in helping to coordinate the resources based on team competencies. As the project unfolds, it's the project manager's job to direct and manage each activity, every step of the way. That's what happens in the implementation phase of the project life cycle: you follow the plan you've put together and handle any problems that come up.

The implementation phase is where you and your project team actually do the project work to produce the deliverables. The word "deliverable" means anything your project delivers. The deliverables for your project include all of the products or services that you and your team are performing for the client, customer, or sponsor, including all the project management documents that you put together.

The steps undertaken to build each deliverable will vary depending on the type of project you are undertaking, and cannot therefore be described here in any real detail. For instance,

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engineering and telecommunications projects will focus on using equipment, resources, and materials to construct each project deliverable, whereas computer software projects may require the development and implementation of software code routines to produce each project deliverable. The activities required to build each deliverable will be clearly specified within the project requirements document and project plan.

The job of project manager is to direct the work, but you need to do more than deliver the results. You also need to keep track of how well your team performs. HR would actively support the Project Manager with Performance Plans, and help monitor them. The implementation phase keeps the project plan on track with careful monitoring and control processes to ensure the final deliverable meets the acceptance criteria set by the customer. This phase is typically where approved changes are implemented.

Most often, changes are identified by looking at performance and quality control data. Routine performance and quality control measurements should be evaluated on a regular basis throughout the implementation phase. HR would support the performance measurement process in an indirect way with the Project Manager. Gathering reports on those measurements will help you determine where the problem is and recommend changes to fix it.

➢ HR in Focus: Human Resources and Execution or the Implementation Phase

During this phase, Human Resources may play a less active role as the project activities are completed by the team. However, they may be involved in monitoring the communication plan, report distribution, and performance of the team.

➢ Communication Plan

Human Resources would assist in setting up the Communication Plan and on a regular basis "check in" with the team on how communication between the team, and the Project Manager, and between the Project Team and external stakeholders is developing. If there are issues, they may act as a support to help get communication channels back on track.

➢ Report Distribution

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Human Resources may play a role in monitoring report distribution, and ensuring that reports are flowing where they need to be. For example, who needs the reports, and what time do they need them by? If there are issues, Human Resources may intervene to figure out the issues, and help the team solve the problems.

> ➤ Performance Plans

Human Resources would have established performance plans with the team and Project Manager at the beginning of the project. They would regularly "check in" and perhaps have mini-performance reviews with the team (individually, or team) to ensure the goals are being met, that deadlines are being met, and the team dynamic is strong. If there are issues, HR may support the team in developing strategies to improve performance through training, individual or team motivational speeches, and through workshops on team building (refreshers). If there are issues the Project Manager is having difficulty with, the same would apply. If the Project Manager was having difficulty with the team, or an individual, HR could provide support and guidance on how to deal with the issues.

(5.4. Execution or Implementation Phase – Strategic Project Management: Theory and Practice for Human Resource Professionals Patterson, 2022)

4.4. Adaptation of the Plan after pilot implementation

After implementing the HR development plan, it may be subject to continuous improvement and adjustment based on its success and effectiveness. If members of the HR department notice that the program is successful, they may decide to continue it without modifications. HR employees may also seek employee feedback regarding the application and execution of the HR development activity or program. This can help them identify ways to improve these development opportunities so the employees and organization can benefit and continue to develop.

(https://www.indeed.com/career-advice/career-development/what-is-hr-development Northup, 2023)

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4.5. Additional tips for creating and implementing the Human Resources Development Plan

Plan for different seasons of work

With agencies, it's common to have busy seasons of work. It's also likely there's a time of the year when most of your team is off but client work keeps going. An effective HR resource strategy plans for these times.

Begin with marking important dates in the year and reviewing the workload from the past years. Add in other events such as employee retirement and departures too.

This will help you identify times when the seasonal workload is different from the typical workload. It'll also help you strategize for the coming 12 months — creating backup plans, for example, working with freelance contractors when business demand is high.

Document your human resource strategy and processes

If you haven't already, work out a central place and format for documenting your processes.

But make sure you create breathable or easily editable documents since strategizing is a continuous process that takes lots of iterations as per organizational goals and changes.

It's normal to feel overwhelmed at the prospect of documenting strategies and processes though. However, the benefits that documenting delivers are countless. From making it easy to review, evaluate, and adjust your processes to simplifying sharing them with stakeholders, documenting helps significantly. Keep this in mind to beat the overwhelm.

Assess staff's skills regularly

This also includes their soft skills. But why bother assessing employees' skills? Because:

- It helps retain top talent;
- Assists you in meeting business goals, boosting client satisfaction, and retaining clients;
- Helps you encourage employee growth as per their career development roadmap;
- Most of all, having a rundown of your staff's skills assists in managing your project pipeline and allotting work as well. Not to mention, knowing what your employees can best accomplish helps with optimal resource utilization too.

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Essentially, having a high-level overview of your staff's skills is the only way to learn what skills your employee pool already has, what's needed, and what's changing in your workforce and industry (so your workforce can adapt accordingly).

Remember to assess not only current employee abilities and skills (including technical know-how and interpersonal skills) but also how your workforce capabilities compare with your competitors. The latter helps you plan for upskilling and reskilling so you can stay on top of your industry.

And while you're at it, spot trends in employee performance evaluation data too. It's important to pay attention to both positive and negative trends. In particular, review responses to training programs to understand how well your efforts are materializing into benefits.

Plan for business growth

Chances are your business started off with two team members. But grew along the way. Whatever the case may be, always plan for growth.

Evaluate the current services your agency provides, what services current clients are demanding, and what you'd like to offer down the line. Then, plan for future needs.

You'll also want to think of specific tasks and jobs done in your company.

Write down the jobs and create accurate job descriptions. From there, prioritize which roles need to be filled in first. If you aren't hiring soon, set benchmarks for when to start looking for the best candidates.

Use the right software

Investing in the right software from the get-go simplifies and streamlines human resource planning.

It serves as your single source of truth that offers an in-depth look at available resources, their hourly rates, skills, and more. It also gives an overview of the projects they've worked on and the tasks they're currently handling.

What's more, you can see how many hours they work typically and whether they're underutilized or nearing burnout. This way, you can understand when employees are due and off and adjust workload/resources accordingly.

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All of this helps with gap analysis, employee retention, resource planning, and optimal resource utilization — ultimately helping meet business needs.

(Human Resource Planning Done Right: A Step-by-Step Guide | Runn Viter, 2023)

Focus on fostering trust and respect

Besides employee performance improvements and skill acquisition, HR development initiatives can create an environment where employees trust and respect the organization and each other. Fostering a positive and open work environment can help increase employee commitment and satisfaction across the company.

Trust is key to collaboration and smooth operations. Knowing you can be confident in your peers and that they can also trust you in return can boost motivation and help achieve mutual success in your work. Here we explain where a lack of trust can come from in the workplace, explore why trust is important among employees and present tips for building trust with coworkers.

A lack of trust in the workplace can occur when employees have doubts about the organization or their coworkers and feel they can't rely on others to get tasks done. This can result from:

- An absence of transparency;
- Little to no communication;
- Inadequate work performance

Trust in the workplace may also depend on your perception of the competence of others to perform their duties and your perception of intentions being for the group rather than individually based.

Being able to trust employees and coworkers can save an organization time and money because everyone is working toward the same goal and can rely on each other. Trust can unite your team and may even lead to overall job satisfaction because having a work environment where employees can trust their managers and peers enhances many aspects of productivity. Here are some benefits of working in an environment with trust:

✔ Enhances teamwork and collaboration

When employees know they can trust each other, they may feel more comfortable with one another, which can lead to better collaboration and work as one unit. Having a sense of trust among coworkers may allow for more efforts directed toward the common goal instead of

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individually protecting themselves. Collaborative ideas may also occur when employees trust one another to discuss ideas.

✓ Improves productivity and engagement

Trust may lead to more engagement at work since people may put more energy into work they can feel connected to. If you feel your organization cares about you and is honest, you may be more likely to want to do likewise and deliver your best work. Likewise, if a manager trusts their employees, they are less likely to interrupt their day-to-day work for regular updates or monitoring, allowing for a smooth workflow.

✓ Enhances decision-making capabilities

Managers who can trust their employees to work independently and empowers them to make their own decisions can help build their employees' confidence. When employees can make their own decisions and try new ideas without worrying what management or coworkers will say, it can foster decision-making and problem-solving.

✓ Decreases stress in the workplace

As trust increases, workplace stress may decrease. A work environment where everyone trusts each other may help to lower blood pressure and ease anxiety, headaches and other stress-related conditions. Having a supportive team can eliminate fears and create an ability to address problems early on.

✓ Improves employee loyalty and retention

Trust can motivate employees to remain dedicated to a company and can lead to higher retention rates. Mutual respect between managers and employees may create an engaging organization that is desirable to work for. Those who feel trusted and supported may be more loyal to their company.

✓ Improves creativity

Trust can encourage open communication and the expression of ideas. Employees who aren't afraid of authority are more likely to take risks and be innovative than those who fear being punished for mistakes. Because trust can lead to more communication, employees are likely to exchange ideas, possibly leading to the successful creation of new products or services.

✓ Openness to change

When employees have confidence in their employers, they may accept their decisions and changes without worrying questions. A trustworthy manager means you can believe they have

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your best interests in mind and are looking out for the good of the company. Because of the transparent nature of trust, well-informed workers who are aware of changes approaching are better able to adapt to them.

✓ Maintains accountability

Trust can ensure a supervisor believes their employees are up for any task they need to delegate and keep them accountable. When employees know they must complete particular tasks for the company, they may be more likely to take ownership and work harder.

✓ Increases customer satisfaction

Depending on the type of work a company does, trust can lead to an increased level of customer satisfaction. Consumers may be more willing to spend money at companies they believe are transparent with them. This level of openness with customers may allow for a connection and longtime brand relationship.

(https://www.indeed.com/career-advice/career-development/lack-of-trust-in-workplace
Indeed, 2023)

Use data when developing the plan

To receive noticeable and long-term results, consider using data as you develop an HR development plan, which can include numbers related to employee performance or employee satisfaction survey results. This information can help you easily identify potential areas of improvement and define clear and attainable goals.

Prioritize employee requests

Employees may be more willing to commit to an HR development plan if it accommodates their requests and preferences. This can add value to the corporation by creating a more skilled and competent workforce while also increasing rates of employee satisfaction and retention.

Develop internal staff members

While HR development can be an effective way to train new employees, it may also benefit internal staff members who are already with the company. By allocating resources to the advancement and assistance of both new and existing employees, an organization can ensure that all members may benefit.

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Strengthen group and team dynamics

HR development can benefit a company by strengthening internal teams and facilitating an environment that fosters collaboration and teamwork. This can help employees develop their interpersonal communication skills and feel more comfortable contributing to group discussions.

Check-in consistently

One way to maximize your HR development plan is to check in consistently with employees. This includes asking about progress and goals and consulting with the instructors, trainers and other personnel who provide professional development.

Ask for and provide constant feedback

Feedback is critical for successfully implementing an HR development plan. Asking for feedback can help you learn about what changes people enjoy and don't enjoy and how to make changes more specific to the employees at the company. Offering feedback can help you think critically about what changes you want at the company and how specific changes can reach those goals.

Make small changes

People tend to be resistant to change, so making small changes can decrease negative feelings, especially if the small changes create noticeable, positive effects for employees. Small changes can also help you control more aspects of the organization and avoid increasing challenges you may experience from introducing the changes.

Express your gratitude

People appreciate it when you recognize that they're trying to accommodate change. Thanking employees for participating and showing genuine gratitude for their actions can help changes in HR proceed more easily.

Understand people are different

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As you begin to implement an HR development plan, remember that different people learn in different ways. Some employees may be visual or auditory learners, while others excel when they can perform the actions themselves. Implement multiple types of learning into the plan to maximize knowledge retention.

Establish goals

Goals and metrics can help an HR team measure the success of its activities and processes. For example, reviewing an employee retention metric before and after the implementation of changes within an organization can help a company determine if that change benefited them. (https://www.indeed.com/career-advice/career-development/what-is-hr-development Northup, 2023)

Used sources:

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5. Important templates and examples

5.1. Skill-based development plan

5.1.1. Steps in preparing a skill-based development plan

A skills development plan is a custom-made action plan that focuses on the skills that need to be developed. For anyone with such skill to hone it, development plans are made. Skills development plans come in handy when it comes to addressing areas like business, self-improvement, careers, or personal growth. These necessary skills that need to be developed will be of great help to a student, an employee, or a business-minded person seeking better business development.

Step 1: Draft a Plan with Specific Goals

To start this type of plan, make a draft and choose a specific goal you will need to address. Since there are a lot of different skills to choose from, you will also be needing to make different skills development to address them. Draft all your plans and be specific with the goals you plan with them.

Step 2: Make a Skills Assessment.

The skills assessment engages you in seeking the right skill to hone. It also shows you the areas you need to improve and help you develop the right plan. The assessment does not have to be too long or complicated. As long as the assessment is done. The important thing to remember is what skill is important to you and what areas you need to improve it on.

Step 3: Seek Productive Strategies to Help

The productive strategies to help can include any or all training. Maybe self-taught training or group training that can benefit just about anyone. Workshops and seminars can also be considered productive strategies you can add to the list of your development plan.

Step 4: Finalize the Draft and Revise If Necessary

The last step is to finalize the draft you made from the first step. Make some finalizations and revision on your draft. When you are satisfied with your work and no revisions are made you can now do your skills development plan. However, there is always room for improvement. Be open to any suggestions or revisions on the plan.

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5.1.2. Skills Development Plan Template

Development planning is an integral part of every PGR degree at LSBU and every student enrolled at the London Doctoral Academy will be expected to take part in its innovative KSDP programme. Starting with a review of skills, all research students create their own personal development plans, formulated to help deliver their aspirations.

This personal plan is updated yearly to ensure that it is fit for purpose and that it responds to meet the changing research environment. Each course offered by the KSDP program is linked to a research stage and the RDF domain in order to provide a clear development pathway that takes every PGR student through to their completion and beyond.

And on each step of the journey, the development activities, trainings and seminars are recorded in a portfolio that stands as a record of achievement.

Course provision

The Key Skills Development Planning has at its core ten courses and workshops that all PGR students are expected to engage with during the life of their research degrees. These are complemented by an induction day to get the process running. Attendance at the London Doctoral Academy's acclaimed Summer School is also part of the programme.

In addition to these core activities, there are school-based seminars, and a wide range of optional courses, workshops and skills development courses that can be built into the portfolio of each PGR student in order to equip them with the key skills to succeed.

Skills Development Plan for Major Projects

The purpose of a Skills Development Plan (the Plan) is to provide training and development that meets the objectives and requirements of the Training Policy and supports the skills development needs of the project workforce, including direct employees, labor hire, group training companies and subcontractors. The Plan should also develop the skills base and future workforce capability of the building and construction industry more broadly.

The Plan requires contractors on major projects to analyze the skills development needs of the project workforce, identify any skills gaps that exist between the project requirements and project workforce skills, and prioritize and provide the training and development required to address the skills shortage.

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The Plan should commence with a skills needs analysis, which could include the following elements:

- Workforce occupations and job roles within the project
- Determination of career paths within the industry
- Gap analysis – an assessment of current competence against the desired competence to determine skilling gaps
- Mapping of the skilling requirements against nationally accredited training packages
- Mapping of the skilling requirements against other workforce training.

The following provides some key elements that will assist in the development of a plan that will provide the basis for effective skills development during the life of the project:

- A brief overview of the project, including project description, project scope and project workforce
- Identification of the Training Policy requirements for the project and how this will be implemented and achieved, including the indigenous economic opportunities plan, if applicable.
- Identification of a dedicated training coordinator employed by the Principal Contractor to ensure the implementation of the Skills Development Plan.
- Identification of suitable participants, including existing workers and the effective use of apprenticeships and traineeships.
- Identification of training needs and skills assessment for existing workers and new entrants on the project and project skills shortages, including direct employees and subcontractors.

5.1.3. Objective of the Skills Development Plan

Over the next four to five years, the tourism and hospitality sector will experience a considerable growth as measured by the number of guest rooms occupied in the Eastern Province. Based on data collected from the Sri-Lanka Tourism Development Authority (SLTDA), and assuming a constant growth rate of 20% over the 2017 to 2020 period, the number of guest nights is expected to increase from 615,000 to 982,000. This anticipated

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growth will increase exchange earnings in the Eastern Province from around US74 millions in 2017 to 154 million in 2020. There will also be increased employment opportunities and raised demand for different products and services along the value chain across the Eastern Province. Labour market demand varies across the three districts, with the largest number of vacancies being experienced in Ampara. Evidence from a recent enterprise survey found that the number of vacancies in Ampara were three times those of Trincomalee or Batticaloa. **The types of vacancies (or occupations in demand) vary across the three districts**, with a large percentage of vacancies (42.8%) occuring in Ampara for low-skilled occupations. In contract Batticaloa has a large percentage of vacancies for high and medium skilled occupations. In Trincomalee the demand is primarily for middle skilled occupations. The evidence suggests that enterprises are able to readily recruit lower skilled occupation, but it takes longer to find suitable middle or higher-level occupations. Common low skilled occupations experiencing high demand include: cleaners, waiters and room attendance persons. Medium and higher-level occupations in demand include cooks, managers, kitchen stewards and head waiters.

Employment and Skills Development in the Province face a number of constraints and these can be summarized as in the table below:

Challenges facing skills development and Employment accross Eastern Province

Supply Constraints	Demand Constraints
Limited access to TVET programs	Limited commitment to training
Poorly equipped training providers	Lack of organized employers in the tourism sector
Lack of suitable training programs for the sector	Lack of modern HR practice in the workplace
Low quality skills being developed	
TVET programs that take too long to deliver	Failure to market Eastern Province as a tourist destination
Poor attitudes of parents and learners towards the sector	Limited utilization of ICT in the sector
	Labour legistlation that favours employees
A large brain drains for occupations at all levels	Limited support for the informal sector.

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Printable Skills Development Plan

The following principles and goals inform the policy statements of the NSDP:

1. *Advancing an equitable and integrated system*

   a) The NSDP carries with it the commitment to transformation and regress through a strong focus on addressing equity in relation to gender, race and disability, and ensures that skills development reaches those already in employment, those who are unemployed as well as those who are pre-employed (students);

   b) The levy-grant institutions will facilitate access to qualifications (and part qualifications) consistent with the imperatives of growth, employment creation and social development, and as registered on any of the three sub-frameworks of the National Qualifications Framework ("NQF"); and

   c) Funding from the fiscus will provide the base-funding for PSET institutions, complemented by levy-grant funding to enable the stability of the system. This will allow the move from ad-hoc projects to medium- to long-term imperatives, with a particular focus on quality provision and workplace-based learning.

2. *Greater Inclusivity and collaboration across the system*

   a) Collaboration through partnerships within the public sector as well as between the public and private sector to support effective skills development;

   b) A focus on quality and articulation ensures effective pathways;

   c) Strong focus on workplace-based learnings in bot the public and private sectors;

   d) Partnerships will be forged across the skills development system with both public and private providers; and

   e) Effective and meaningful stakeholder engagement to support ownership and participation among stakeholders including social partners, individuals, employers, labour, providers, prospective learners, and the public.

3. *Focusing on support system for learners*

   a) Prospective learners and the public are aware of when and how to apply for programmes and have access to a simplified and centralised process;

   b) Improve efficiency and effectiveness of decision-making, planning, allocation of funds, implementation, and quality assurance; and

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c) Where possible and relevant, the use of technology will be harnessed to standardize processes across all SETAs, improve efficiencies and increase stakeholder.

5.1.4. FATA Skills Development Plan

Skills development and Technical and Vocational Education and Training (TVET) are critical to job creation and sustainable economics development across Pakistan. Each region and province has its own development needs and skills priorities based on the circumstances it faces. Regional stakeholders in FATA have developed **this skills development plan** (SDP) in order to set out the actions needed to improve the skills and employability of their people. The plan targets selected skills development requirements which will allow FATA to develop its economy and society.

The plan is based on the National Skills Strategy (NSS) developed through a national consultative process in 2009. The implementation plans for the strategy were delayed due to the 18th Amendment and its impact on the TVET sector. Now provinces are in a position to develop their own programmes within the framework of the NSS, but adapted to their specific economic and social needs. The NSS envisages the provision of relevant skills for industrial and economic development, improvement of access, equity and employability and assurance of quality through an integrated approach. To translate this framework into viable reforms, the NSS suggested twenty strategic initiatives.

The FATA plan translates the NSS into concrete activities for the region. TVET programmes are implemented by different organisations, such as the FATA Secretariat, the FATA Development Authority (FDA), NGOs, CHOs, private companies, or through projects. The FATA SDP identifies existing actions undertaken by these organisations and assesses them in the light of regional skill needs and priorities. It identifies gaps in skills development provision, and additional opportunities for action. It then formulates these into an action plan which ensures that the implementing agencies will include them in their own planning. Each activity sets annual targets so that the progress can be monitored.

With the support of some international and nation experts, an advisory group and a technical working group was established representing the major stakeholders in skills development in FATA. After a series of consultative activities involving all skills development stakeholders, the plan was constructed and submitted to the FATA Secretariat. The plan has subsequently

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been updated following a meeting of all TEVTAs and an interprovincial workshop involving a wide range of stakeholders from all provinces and regions.

The FATA SDP consists of three parts:

- An assessment of the planned activities, including a prioritization of activities planned and what challenges this poses;
- The regional skills development profile, a short introduction to set the context and the general characteristics of skill development in the region; and
- The activity matrix, which lists all activities planned by the different stakeholders involved in the planning process.

- Skills Development Plan Example

Specific recommendations for capacity building include:

1. **Coordination recommendation 1:** A sequence of training modules on the benefits and best practices for coordinating forces at the nation level and at the regional level.
   - Module I demonstrates the operational utility of effective coordination and how to implement it using international best practices.
   - Module II demonstrates how to operationalize effective coordination develop an implementation plan at the national or regional level.
   - The target audience includes senior commanders from each of Mali's forces at the national level and commanders from each force present in the selected region(s).
2. **Coordination recommendation 2:** A sequence of training modules on the benefits and best practices of coordination among forces at the commune and cercle levels.
   - Module I demonstrates the operational utility of effective coordination and how best to implement it using international best practices.
   - Module II demonstrates how to operationalize effective coordination and develop a commune at circle-level work plan
   - The target audience includes commanders from each force present in the selected commune(s) or circle(i).
3. **Coordination recommendation 3:** A stress-test exercise that simulates the shared operational challenges at the national level to build trust and relationships.

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- This exercise serves as a capstone to the modules in Coordination Recommendation 1 or as a stand-alone activity.
- The target audience includes national level commanders from each of Mali's forces.

4. **Coordination recommendation 4:** A stress-test exercise that simulates the shared operational challenges of commune, circle, and regional forces in building trust and relationships.

   - This serves as a capstone to the modules in Coordination Recommendations 1 or 2 or as a stand-alone activity.
   - The target audience includes security force commanders at the commune, circle and regional levels.

5. **Coordination recommendation 5:** Incident response simulation(s) to build capacity for coordination and joint operations planning at the national level.

   - Three tabletop simulations focused on border security, each using a different incident.
   - Incident scenarios will be developed in consultation with Malian government personnel, based on perceived threats and concerns.
   - Incident scenario examples include violent drug trafficking, large-scale civic unrest, and a cross-border terrorist incursion.
   - The target audience includes national force commanders and senior government officials.

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5.1.5. BSBLED101A Plan skills development

Modification History

Not applicable.

Unit descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify and document current skills and to plan future skills development under the guidance of an appropriate adviser.
	No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the unit

Application of the unit	This unit applies to individuals developing basic skills and knowledge of career planning and skills development in preparation for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Skills (Mark out of 10)	Current state	Gap	Desired state	Initiatives
Communication	4	4	8	-Assign a manager level person to do regular session on communication and negotiation skills
Negotiation skills	5	3	8	
Microsoft office software skills	3	3	5	-Follow an online or offline course to learn Microsoft office (company will allocate budget for education next year)
Documenting skills	3	5	8	-Structure a good work process and document it
Work on process skills	6	2	8	
Meet deadline	6	3	9	-Put estimates for all tasks and create the deadline accordingly
Knowledge of fundamentals	6	3	9	-Follow an online course to learn fundamentals (company will allocate a budget for education next year)

Table 2, Source: 10+ Skills Development Plan Examples [Business, Student, Employee] www.examples.com

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The plan is quite simple: managers list their employees' skills and grade them on a scale from 0-10. Then, there is a "Desired State" explaining what the manager expects from the employee to advance in their career and within the company.

What it does well:

- Starts with skill assessment;
- Uses competency profiles for the desired state.

What could be improved:

- Doesn't connect goals to actions;
- Looks more like a skill matrix than a development plan.

The "Gap" section defines what employees need to advance in their careers. The "Initiatives" section offers the specific actions that they need to take to achieve their goals.

To make this example more impactful:

Ensure that your skill-focused development plan is not exclusively based on the managers' assessment of employee skills (skills gap analysis).

To achieve this, add employees' self-assessments and even peer reviews to get more accurate results, and to prepare an effective skill-based development plan.

Employee Name:	[Employee Name:]
Date:	[Today's Date:]
Current Title:	[Job Title]
Current Strengths:	[List of Current Strengths]
Development Needs:	[List of Development Needs]
Professional Goals:	[List of Professional Goals]
Step 1:	Step 1: [Timeline for Step 1]: [Actionable steps toward completion of goal]
Step 2:	Step 2: [Timeline for Step 2]: [Actionable steps toward completion of goal]

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Step 3:	Step 3: [Timeline for Step 3]: [Actionable steps toward completion of goal]
Step 4:	Step 4: [Timeline for Step 4]: [Actionable steps toward completion of goal]

Table 3, Source: 10+ Skills Development Plan Examples [Business, Student, Employee] www.examples.com

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Professional Development Plan *for* **[Employee Name]**

Include as many learning needs as required to achieve your agreed-upon objectives for the upcoming year.

Learning and Development Need	Type of Development	Timeline	Who is Responsible ?	Comments
Provide a specific description of the desired changes (e.g. skills gained, knowledge acquired, topics/themes/content covered)	*Examples:* • course or work-shop • conference • self-development (research or reading) • coaching or mentoring • job shadowing • project work • committee membership	*Examples:* • end of April • to be completed in the next 6 months • over next 1-2 years	*Examples:* • staff member • manager to arrange • staff member to work with team and manager	*Examples:* • resource requirements • additional notes
Gain additional skills in Microsoft Excel to increase my knowledge and improve my efficiency in daily tasks.	Attend intermediate and high-level Excel courses through UW-Madison face-to-face or online. Partner with peer staff	Complete by the end of my next 6-month review period.	I will research available coursework in mid or upper-level Excel skills and seek approval	

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	to learn new Excel functions.		from my manager. I will find a peer team member to shadow and learn new Excel skills.	
Explore my interests in the field of finance, with an emphasis on data analytics.	Attend one regional conference and research how my interests in data analytics will specifically enhance my current position.	Complete conference and occupational research before the end of my annual summary evaluation discussion.	I will research and seek approval to attend the next annual conference and provide a summary to my manager of what the conference provides attendees. I will explore my interests in data analytics and share my findings to my manager.	

Table 4, Source: https://www.zavvy.io/blog/employee-development-plan-examples www.zavvy.io, 2023

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5.2.   Results-based development plan

"…a management strategy [or approach] by which all actors, contributing

directly or indirectly to achieving a set of results, ensure that their processes,

products and services contribute to the achievement of desired results (outputs, outcomes and

higher level goals or impact). The actors in turn use

information and evidence on actual results to inform decision-making on the

design, resourcing and delivery of programmes and activities as well as for

accountability and reporting." – United Nations Development Group (Results-Based
Management Handbook, 2011).

THE MAIN PRINCIPLES OF RESULTS-BASED MANAGEMENT (RBM) ARE:

• Broad participation in the planning process – listening to and involving relevant stakeholders
including the target groups;

• Structured and clear plans with clear objectives and allocation of responsibilities;

• Continuous risk analysis and risk management;

• Continuous monitoring, not just at the end of the project;

• Analysis of results during the follow-up and revision of plans where necessary;

• Effective dissemination of results for positive influence, strategic communication;

• And finally, continuous and organisational learning.

THE LFA-METHOD IN BRIEF:

• A results-oriented planning method for projects, programmes and operations.

• One of the methods when implementing Results-Based Management (RBM)

• A planning method that leads to a complete plan based on the target group's and other
stakeholders' participation in the planning process.

• A method that leads to relevant, feasible and sustainable projects and programmes.

• A tool that offers the preconditions for sustainable effects through continuous follow-up of
results.

• An instrument for desk-officers that, in addition to planning, LFA is also used by financing
agencies for analysis, assessment and in dialogues with implementing agencies and
organizations.

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Hence, what LFA stands for is in accord with the principles behind Results-Based Management (RBM).

A PROBLEM ANALYSIS IS DIVIDED INTO THREE PARTS:

• The focal problem:

The focal problem is the one problem that the project shall focus on.

When formulating the focal problem, you need to think of those that are included in the target group, the final beneficiaries, and what mandate and resources you have as a project group. It must be realistic for the project group to solve this problem during the project period. The focal problem then later becomes the project objective.

Most often, the focal problem focuses on challenges in the situation of the beneficiaries, e.g.insufficient care support for children with disabilities in a city, a weak communication system for the local population in district X, poorly functioning obstetric care in the region or contaminated drinking water in a village. The level of the focal problem naturally depends on who is implementing the project and who the project owners are. In the event that it is a ministry or agency (a public authority) that owns the project, the scope/level of the focal problem may be 'higher' and more far-reaching, than when it is a civil society organisation responsible for the implementation of the project.

• Reasons/causes:

The underlying reasons behind the focal problem, which help explain why the focal problem exists. All main problems have their individual reasons. These are the factors that the project group shall attempt to eliminate in order to solve the focal problem.

• Effects:

In this case, "effects" refer to the consequences of the focal problem for the individual and the community, e.g. increased poverty, decreased GDP, increased pollution etc. The effects provide arguments for decision-makers and other stakeholders for why the focal problem is so important to solve.

The problem analysis forms the basis of the formulation of objectives in a plan, and gives us three different levels of objectives.

The objective analysis should provide answers to the following questions:

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• What are the long-term effects of the project? Why is the project important in a longer perspective? (The overall objectives, development objectives.)

• In an ideal situation, what are the intentions of the project owner and target group in the medium term? Why does the target group/the beneficiaries need the project? This level, the project objective, should be achievable within the project's lifespan.

• What elements does the situation comprise? What must be handled successfully to achieve the project objective? Short-term objectives, so-called intermediate objectives, should be achieved during the project period. The activities are linked to intermediate objectives; each intermediate objective has an activity plan.

Types of objectives:

– OVERALL OBJECTIVES, DEVELOPMENT OBJECTIVES (Leads to Impacts).

– PROJECT OBJECTIVES, PROJECT PURPOSE (Leads to medium-term outcomes).

– INTERMEDIATE OBJECTIVES, IMMEDIATE OBJECTIVES (Leads to intermediate outcomes or more often called short term outcomes).

The project objective and the intermediate objectives should be "SMART".

A SMART objective is:

• Specific (clear);

• Measurable;

• Accepted (by the project group and the project owner, which could be e.g. a ministry);

• Realistic (on the basis of conditions such as mandate and resources);

• Time limited (the objectives should be achieved during the project period).

The main resources (inputs) needed in a project are:

• Technical expertise/personnel, i.e. knowledge/competence:

An overall staffing plan and a division of responsibilities per activity should be carried out before the project implementation. Discussions concerning the particular competence required for the performance of each activity is necessary. Furthermore, the group needs to discuss whether it already has sufficient project management and administrative competence, or whether external competence is needed.

• Budget: Draw up a detailed budget, with a breakdown for each activity.

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• Time: Make a timetable linked to the activity flow.

• Equipment: Investigate whether any equipment is needed for the implementation of the project.

Example of a template for a project plan broken down by intermediate objective:

INTERMEDIATE OBJECTIVE 1:				
Activities	Expected outputs	Responsible person	Time	Budget/activity
1.1				
1.2				
1.3 etc.				

Table 5

MONITORING: INDICATORS	MEANS OF VERIFICATION

Table 6

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EXAMPLES OF POSSIBLE INDICATORS AND MEANS OF VERIFICATION FOR AN INTERMEDIATE OBJECTIVE:

Intermediate objective: "Improved employment measures implemented by the authorities for young women and men with disabilities seeking work in district X". Indicators and means of verification (All indicators below should be disaggregated by gender as well as by different disabilities):

1. Indicator: Number of young people who have benefited from support measures within the framework of the project. *(Source of Verification: Participant lists and analysis of data.)* *(Expected output: at least 60 young adults have achieved support, of whom 30 women and 30 men.)*

2. Indicator: Share of young adults in the target group who have been awarded passing grades as a result from vocational training measures (scale e.g. 1-5, where 2 is a pass). *(Means of Verification: Follow-up through study of students' marks. (Expected output: At least 80% of the target group shall have passed/ received certificates.))*

3. Indicator: Number/share of young people in the target group who perceive they have received relevant support and venture to take the next step of seeking employment. *(Means of Verification: Interviews with target group and/or questionnaires for the target and a study report.) (Expected result: At least 70% of the target group perceive that they have received relevant support.)*

4. Indicator: Viewpoints/opinions amongst target groups concerning the quality of the support measures that have been carried out within the framework of the project and that the target group has made use of *(Means of Verification: interviews amongst target groups and/or questionnaires and scale 1-5 as well as written comments.)*

5. Indicator: Number (or share) of young people in the target group who have been called to interview by employers *(Means of verification: Interviews with the target group and questionnaires) (Expected result: At least 70 % called to interviews.)*

6. Indicator: Examples of support measures that have led to employment *(Means of Verification: Interviews with the target group and with teachers.)*

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7. Indicator: Proportion of young people in the target group who have obtained employment during or after the project period *(Means of Verification: Questionnaires and interviews with target group young people.) (Expected results: At least 60 % have attained employment.)*

RISK ANALYSIS AND MANAGEMENT

RISKS	PROBABILITY (that the risk will occur)	CONSEQUENCES (for the results)	RISK VALUE (column 2 and 1 multiplied)	RISK MANAGEMENT
1. High turn-over of trained staff, they leave (e.g. braindrain)	**4**	**5**	**20**	**a. More training b. Develop manuals c. Institute internal training, training of trainers (ToT) d. Avoid dependence on one person, shared responsibility for training**
2. Deliveries delayed	**1**	**2**	**2**	**No measure required due to low risk value**

Table 7

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LFA MATRIX (SUMMARY OF A PROJECT PLAN, THE LOG FRAME/LFA MATRIX)

INTERVENTION LOGIC	INDICATORS	MEANS OF VERIFICATION, (MoVs)	ASSUMPTIONS
Overall objectives	(Indicators)	(Means of verification)	(Empty Box)
Project objective	Indicators	Means of verification	Assumptions
Intermediate objectives	Indicators	Means of verification	Assumptions
Expected outputs	Activities	Resources	Preconditions

Table 8

PRINCIPAL QUESTIONS WHEN MAKING A MONITORING PLAN:

• WHAT should the monitoring focus on? (Objectives, step 4 in LFA) with the help of indicators (step 7 in LFA).

• WHAT FORM the monitoring should take? Which tools should be used to collect information, the so-called means of verification or sources of verification? (see LFA step 7, e.g. through interviews, questionnaires with target groups or through studies, tests).

• WHO will be responsible for the data collection and the analysis of data?

• WHEN will the monitoring take place? (e.g. continuously after each training occasionally or once every six months or both of these?).

• WHO should receive information on the monitoring results?

• HOW do we apply (use) the results?

• WHO/WHICH should take any new decisions on potential revisions of the project plan?

(A guide to Results-Based Management (RBM), efficient project planning with the aid of the Logical Framework Approach (LFA) Örtengren, 2016)

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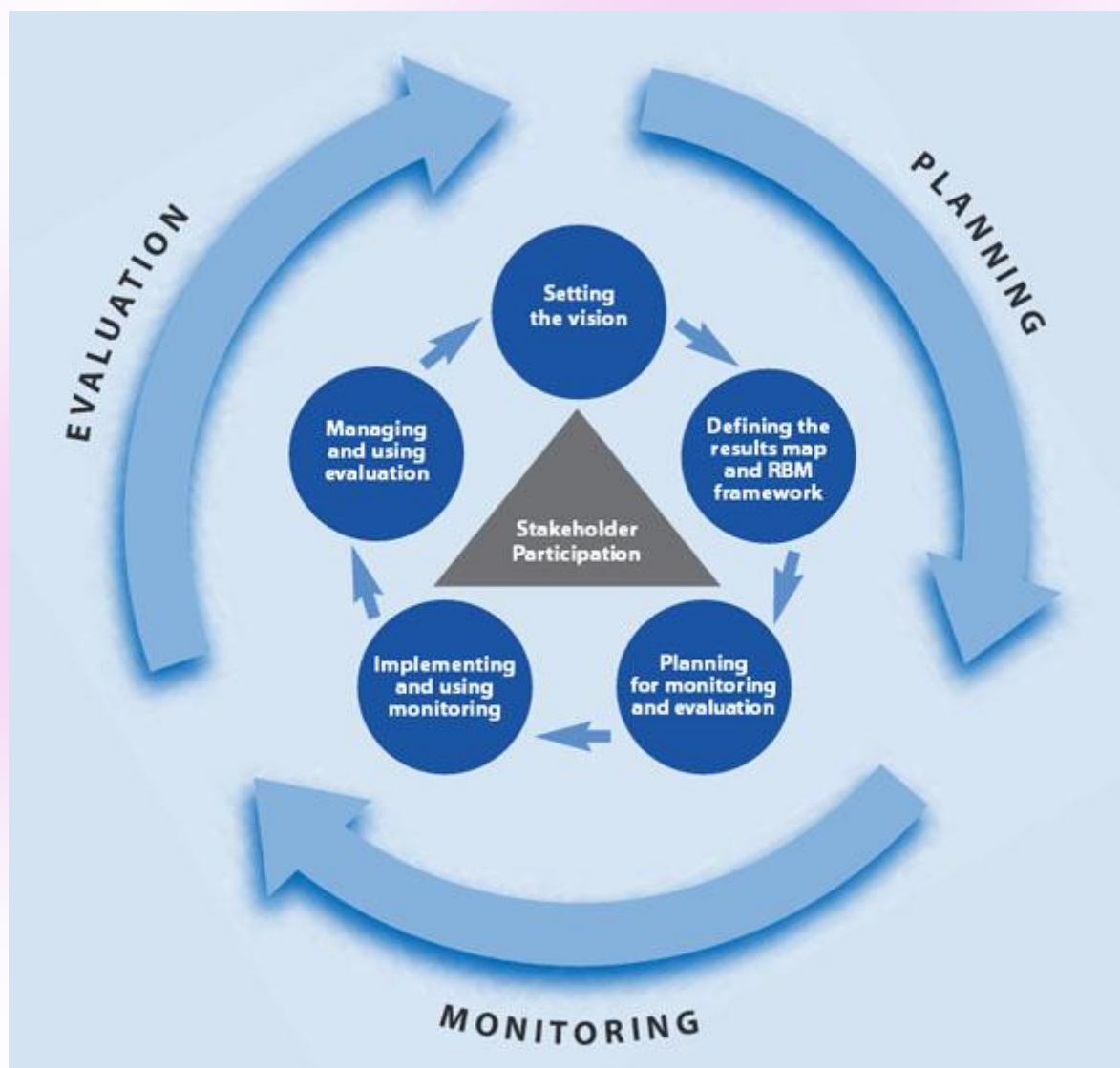
*Figure 3, Source: https://www.fao.org/fileadmin/user_upload/investment/img/RBMfig1_600.jpg Food and Agriculture
Organization of the United Nations, 2023 https://www.fao.org/*

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Our Approach to Talent Development

Source: https://www.zavvy.io/blog/employee-development-plan-examples

"We hope that MongoDB will be an inflection point in the careers of our people. We believe every employee and role has growth potential. Growth happens through formal training, social learning and on-the-job experiences; we provide support in all three categories.

Formal training includes on-demand, self-guided courses, as well as organized training sessions. In addition, we organize Learnathons, which are company-wide workshops covering a variety of topics. In FY22, we organized 44 sessions and workshops with over 1000 attendees.

Social learning involves internalizing and reflecting on one's learnings, as well as sharing and comparing experiences with peers. For example, for first-time managers, we offer a Leadership Development Program (LDP), a four-day workshop focused on self-awareness, building trust and team development. LDP not only provides new managers with valuable formal training but also creates a network of peers on which they can rely.

On-the-job learning occurs through practicing new skills, solving problems and working through challenges, all with the support and feedback from one's manager. We support on-the-job learning through a Performance and Growth feedback program, a bi-annual opportunity for structured feedback and goal-setting conversations between an employee and their manager. All full-time employees participate in the program."

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10%
Formal training
(live/online)
Recommended
reading

20%
Manager support, coaching,
cohort learning

30% Facilitates
the 70%

70%
On the job learning, stretch projects,
system-enabled feedback

Figure 4, Source: https://www.zavvy.io/blog/employee-development-plan-examples

5.3.   Comprehensive employee development plan

A professional development plan documents the goals, required skill and competency development, and objectives a staff member will need to accomplish in order to support continuous improvement and career development. A professional development plan is created by the manager working closely with the staff member to identify the necessary skills and resources to support the staff member's career goals and the organization's business needs. Professional development for staff members begins when a new member joins your team. In addition, all staff members should have a "living" professional development plan in place. Planning should not take place only after a staff member is identified as needing improvement. Professional development plans should be reviewed on an on-going basis throughout the year, with at least one interim review discussion between the staff member and supervisor prior to the end of the yearly performance review period.

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5.3.1. Professional Development Planning Steps

Use the following steps to create a professional development plan with your employee. Feel free to use the example professional development plans to assist you in the process.

➢ Step One: Request a self-assessment from the staff member

Have the staff member complete a self-assessment of their interests, skills, values, and personality. Use the sample performance planning and self-assessment forms to assist in the process. When evaluating the staff member's responses, keep these questions in mind:

- What skills, career opportunities, technologies interest the individual?
- Do those skills/interests/goals support the organization's needs and goals?
- What are the short and long term steps to get there?

➢ Step Two: Develop your assessment of the individual's skill level

Based on the staff member's self-assessment, their work record, and your own observations, determine the staff member's skill level in the following categories:

- Technical skills: skills needed to get the job done.
- Social skills: how do they work with others?
- Aptitudes: natural talents; special abilities for doing, or learning to do, certain kinds of things.
- Attitude: outlook, feelings, mind-set, way of thinking, and point of view.

➢ Step Three: Assess the department and organization's needs

In order for professional development to be successful, the staff member's needs and interests must be applied to address organizational objectives. The staff member's career path must align with the organization's workforce needs. In creating a professional development plan, consider the following goals:

- Departmental goals
- Team goals
- Individual goals

➢ Step Four: Explore development opportunities with the staff member

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Explore the professional development opportunities with your staff members. Some examples include:

- New Projects & Responsibilities - Explore what new projects and responsibilities the staff member can assist with in their own department. Staff members can use such opportunities to develop new skills such as web design, business writing, and project management.

- Workshops & Seminars – this includes a variety of workshops and seminars that help a staff member develop their work and computer technology skills.

- Educational Opportunities

- Volunteer Opportunities - Volunteer opportunities can present a unique way for a staff member to develop certain professional skills.

- Mentorship - Interested staff can be paired with mentors for a variety of activities including information interviews, shadowing, tutorials, etc.

➢ Step Five: Record and analyze the staff member's progress

Collect feedback from the staff member about their development progress to assist in identifying what the staff member is doing well, build on their skills, correct any problems that may arise, and help them develop new abilities that will improve personal performance as well as organizational outcomes.

Use a Performance Log for tracking, recording and providing feedback from the staff member. Record dates, events, expectations, and the impact of action steps on their development. Make sure to record:

- Observations of enhanced skills or knowledge and how they were applied.

- Progress towards goals and objectives.

- Observations where skills / knowledge could be applied - use for future discussion.

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5.3.2. Example Performance Evaluation and Planning (PEP) Form:

Duke University	Performance Evaluation and Planning (PEP) Form

Employee's Name:

Job /Classification/Title:

Department:

Manager/Supervisor Name and Title:

Review Period:	From	To

Review Type and Date:	90-New Hire Evaluation Review	Date
	Annual Review	

Table 9, Source: Professional Development Plan | Human Resources. Duke Human Resources, 2023,
https://hr.duke.edu/managers/performance-management/professional-development-plan/#:~:text=A%20professional%20development%20plan%20documents,continuous%20improvement%20and%20career%20development

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Purpose:

The purpose of PEP is to provide summary feedback to staff members on their performance for the year, and to provide clear goals and development plans for the coming year. PEP evaluations are used to make pay and other personnel decisions.

Instructions:

Please complete each section of the form below. For additional information, please see the Form Instructions.

Section 1: Evaluation of Past Year	Section 2: Plan for Coming Year
Section 1A: Job Responsibilities **Section 1B:** Individual Goals **Section 1C:** Behaviors **Section 1D:** Manager's Overall Evaluation	**Section 2A:** Goals for Coming Year **Section 2B:** Development Plan

Evaluation Levels and Sample Criteria

Needs Improvement (NI)	Successful (S)	Exceptional (E)
· Individuals who are new in the learning curve and are still learning key job responsibilities · Inconsistently demonstrates or may be learning the required role knowledge and does not yet fully perform all requirements and duties · Work is regularly incomplete and/or does not meet the minimal standards for quantity or quality; often misses deadlines · Takes little to no initiative, even with prompting	· Individuals who regularly meet and sometimes exceed expectations and role requirements · Meets goals set for the year · Possesses full depth and breadth of role knowledge · Perceived by peers, managers, students and other customers as collaborative, skilled and reliable	· Individuals who significantly and consistently exceed expectations and role requirements · Exceeds goals set for the year · Demonstrates exceptional depth and breadth of role knowledge, highly recognized by others within the University community · Demonstrates role model behavior for other supervisors/staff members to emulate

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· Requires more than the expected level of supervision due to lower quality work or level of learning required to complete role successfully · Inconsistent interactions with peers and/or management	· Consistently interacts effectively with peers and/or management	

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Section 1A: Evaluation of Job Responsibilities

Evaluation of performance of job responsibilities E S NI	Comments on performance of job responsibilities

Section 1B: Evaluation of Individual Goals

Evaluation of individual goals E S NI	Comments on performance on individual goals (measurable actions and results)

Section 1C: Evaluation of Behaviors

Evaluation of demonstrated behaviors E S NI	Comments on behaviors demonstrated

Section 1D: Manager's Overall Evaluation (required section)

Summary evaluation E S NI	Summarize the employee's performance, discussing areas of strength and areas for improvement. Provide Overall Evaluation.
Employee comments on any aspect of the performance evaluation.	

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Section 2A: Goals for Coming Year

Goal	Description and Measures
1.	
2.	
3.	
4.	

Section 2B: Development Plan

Area for Development	Describe Development Activities
1.	
2.	

Signatures (Required section)

Manager/Supervisor   Employee   Next Management Level

Date   Date   Date

Source:

Performance Evaluation Duke University and Planning (PEP), Form Duke Human Resources,

2023,https://hr.duke.edu/sites/default/files/atoms/files/Performance%20Evaluation%20and%

20Planning%20Form.pdf

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5.3.3. Performance planning and review

Duke University

EXAMPLE PERFORMANCE PLANNING AND REVIEW MANAGEMENT FORM

Staff member Duke Unique ID #...

Supervisor/Manager: Duke Unique ID #...

Planning Date:

Mid-Year Review Date:

Evaluation Date:

PERFORMANCE PLANNING AND REVIEW GENERAL INSTRUCTIONS:

The following basic definitions of the rating scale are provided as guidelines:

Exceeds Expectations:

Performance clearly and consistently exceeds communicated performance requirements.

Contributes to organization's success well beyond job requirements. Contributes unique, innovative, and workable solutions to projects/problems. Achievements and abilities are obvious to subordinates, peers, managers, and customers.

Fully Achieves Expectations:

Performance consistently meets the requirements, standards, or objectives of the job.

Occasionally exceeds requirements. Results can be expected which are timely and accurate with minimum supervision. Recognizes, participates in, and adjusts to changing situations and work assignments. "Fully Achieves Expectations" describes solid, fully competent performance.

Needs Improvement:

Performance does not consistently meet the requirements, standards or objectives of the job. Needs improvement in one or more areas of consistent weakness. Problem areas should be monitored and documented. Requires guidance and direction to fully achieve/accomplish responsibilities and objectives. Improvement is required for staff member to fully achieve expectations.

Unsatisfactory:

Staff members must have been counseled regarding unsatisfactory performance to receive this rating. Performance is consistently below requirements and is unsatisfactory. Performance meets few or none of the standards/objectives. Shows failure to follow directions and initiate

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improvement. Knowledge is inadequate to retain in a job without improvement. Corrective action must be outlined and monitored.

Unsatisfactory is a rating that a staff member should not receive twice.

SECTION 1- ONGOING JOB RESPONSIBILITIES, OBJECTIVES and STANDARDS

1. Job Responsibility/Objective: { % }

Standard Expected:

Performance Evaluation Comments:

Performance Rating: (Check one.)

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

2. Job Responsibility/Objective: { % }

Standard Expected:

Performance Evaluation Comments:

Performance Rating: (Check one.)

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

3. Job Responsibility/Objective: { % }

Standard Expected:

Performance Evaluation Comments:

Performance Rating: (Check one.)

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

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4. Job Responsibility/Objective: { % }

Standard Expected:

Performance Evaluation Comments:

Performance Rating: (Check one.)

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

 Exceeds Expectations [ ]

Add more as needed.

SECTION 2 - PERFORMANCE VALUES

Describe the performance on each Performance Factor. Determine the appropriate performance level based on the definitions for each rating category. For the Performance Evaluation, check the box next to the applicable rating. At the end of Section 2, determine a "Combined Rating" for this section. All six Performance Values are of equal weight with a cumulative total of 50%.

Customer Service:

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Unsatisfactory: Consistently shows lack of concern and courtesy. Fails to offer assistance in response to service needs. Has been counseled regarding service orientation.

Needs Improvement To meet Expectations: Not fully aware of the importance of service. Often shows lack of concern and courtesy. Sometimes offers assistance in response to service needs. Has received guidance regarding service orientation.

Fully Achieves Expectations: Consistently demonstrates concern and courtesy for service. Uses effective interpersonal skills. Effectively identifies service needs and responds appropriately.

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Exceeds Expectations: Productively addresses, prioritizes, and responds to service needs. Identifies opportunities to enhance service practices. Evaluates and monitors service orientation. Teaches others how to deal effectively and positively to meet service requirements.

Performance Evaluation Comments:

Dependability:

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Unsatisfactory:

Takes excessive unscheduled absences or is excessively tardy. Fails to complete assigned tasks efficiently.

Does not use resources effectively. Has been counseled regarding dependability.

*Resources include time, materials and equipment.

Needs Improvement To meet Expectations:

Frequently takes unscheduled absences or is frequently tardy.

Often fails to complete assigned tasks efficiently.

Sometimes does not use resources* effectively. Has received guidance regarding dependability.

Fully Achieves Expectations:

Follows attendance and punctuality policy. Can be counted on to complete assigned tasks in an efficient manner. Works well under pressure. Uses resources* effectively.

Exceeds Expectations:

Rarely or never takes unscheduled absences. Rarely or never tardy. Prioritizes and completes assigned tasks in a highly efficient manner.

Maintains a high degree of accuracy and creativity under pressure. Takes initiative in using resources* effectively.

Actively sets priorities and adjusts easily to unscheduled situations.

Performance Evaluation Comments:

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Continuous Improvement:

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Unsatisfactory:

Fails to cooperate in initiatives to improve work processes.

Has been counseled about continuous improvement.

Needs Improvement To Meet Expectations:

Sometimes cooperates or participates in initiatives to improve work processes. Has received guidance regarding continuous improvement.

Fully Achieves Expectations:

Cooperates and participates in improving work processes in the work environment.

Demonstrates flexibility in response to new or improved work processes.

Exceeds Expectations:

Shows initiative by making suggestions that lead to improved work processes.

Always looks for creative and better ways of doing things.

Performance Evaluation Comments:

Diversity:

Take full advantage of the rich backgrounds and abilities of all. Recognize and value differences. Seek inclusiveness. Consider and honor differing points of view.

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Performance Evaluation Comments:

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Trustworthiness:

Demonstrate high integrity, truthfulness and ethics. Words and behaviors are consistent and reflect the highest ethical standards. Listen and speak with honesty, openness, and respectfulness. Keep promises and follow through on commitments.

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

*Safety includes safety standards and crime prevention.

Performance Evaluation Comments:

Teamwork:

Foster positive work relationships through an inclusive team approach. Create an environment for stretching beyond what was thought possible. Seek input and involvement of those affected by decisions. Accept responsibility and accountability. Place team goals above personal goals.

Unsatisfactory [ ]

Needs Improvement To Meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Performance Evaluation Comments:

Learning:

Work, learn and strive for excellence together, sharing successes and mistakes. Expect and encourage continuous learning. Create opportunities for individual and group learning, and learning that crosses organizational boundaries. Recognized that no one has all the answers.

Unsatisfactory [ ]

Needs Improvement To Meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

*Safety includes safety standards and crime prevention.

Performance Evaluation Comments:

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Respect:

Regard, value and recognize the needs and perspectives of others. Actions, decisions, and policies should promote equity. Regard and value contributions and recognize accomplishments. Display interest in, and contribute to others' well-being.

Unsatisfactory [ ]

Needs Improvement To Meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Performance Evaluation Comments:

Combined Ratings for sections 1 and 2

Section 1 Combined Rating for Ongoing Job Responsibilities, Objectives and Standards:

Determine "Combined Rating" for Section 1 and check the appropriate box below. The Section 1 Combined Rating is equal to 50% of the individual's total Annual Performance Planning and Review Rating.

Section 1 Combined Rating:

(50% of Annual Performance Planning and Review Rating)

Unsatisfactory [ ]

Needs Improvement To Meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Section 2 Combined Rating for Performance Values:

Determine "Combined Rating" for Section 2 and check the appropriate box below. The Section 2 Combined Rating is equal to 50% of the individual's total Annual Performance Planning and Review Rating.

Section 2 Combined Rating:

(50% of Annual Performance Planning and Review Rating)

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

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Exceeds Expectations [ ]

SECTION 3

ANNUAL PERFORMANCE PLANNING AND REVIEW RATING

Indicate the staff member's Annual Performance Planning and Review Rating by proportionately consolidating the Section I Combined Rating (Job Responsibilities, Objectives and Managerial Values) and the Section 2 Combined Rating (Performance Values). Section 1 Combined Rating accounts for 50% of the Annual Performance Planning and Review Rating. Section 2 Combined Rating accounts for 50% of the Annual Performance Planning and Review Rating.

Unsatisfactory [ ]

Needs Improvement To meet Expectations [ ]

Fully Achieves Expectations [ ]

Exceeds Expectations [ ]

Supervisor/manager Comments:

Staff member Comments:

SECTION 4 - DEVELOPMENT PLAN Staff member:

Complete each section as appropriate. Provide specific and detailed comments.

A. STRENGTHS

What strengths does this staff member demonstrate as indicated by the Job Responsibilities/Objectives and Performance Values included on this form?

B. AREAS FOR DEVELOPMENT

What could this staff member do to enhance his/her current job performance and/or opportunities for career movement (current, new, untapped skills)?

C. DEVELOPMENT PLAN/ACTION STEPS

Considering the specific training actions, educational opportunities, and challenging assignments which could enhance this staff member's skills, list the development action steps and target dates for development activities during this performance year.

D. ACCOMPLISHMENTS

Comment on the accomplishment of development activities completed during the year.

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SECTION 5 - ACKNOWLEDGMENT AND APPROVAL

The following signatures certify only that the staff member and supervisor/manager participated

in the Performance Evaluation and Development Plan.

Individual's Name:

Signature:

Date:

Staff member:

Supervisor/Manager:

Next Level Approval:

Source:

Duke University - PERFORMANCE PLANNING AND REVIEW MANAGEMENT FORM,

Duke Human Resources, 2023,

https://hr.duke.edu/sites/default/files/atoms/files/Performance%20Planning%20and%20Review%20Form.pdf

Example Employee Self-Assessment Form (Duke University)

Section 1: Staff Member Information

Staff Member Name:

Supervisor Name:

Performance Year: Date completed:

Section 2: Self-Assessment

Please attach additional sheets, if necessary, when answering the following questions:

1.   What were your major achievements in the past year?

2.   Who are your primary customers and how well have you served them this past year?

3.   What are the areas of your performance (behaviors and results) on which you could improve? Please describe.

4.   Are there additional skills or knowledge that would help you more effectively perform your present job or enhance your skill opportunities? If yes, please list.

5.   What goals (specific measurable results) do you expect to accomplish during the next year?

List the subjects you would like to discuss during your annual performance evaluation meeting:

1.

2.

3.

Section 3: Signatures

We have discussed the Staff Member's Self Assessment.

Staff Member:

Date:

Supervisor:

Date:

Source: Duke University Employee Self-Assessment Form, Duke Human Resources, 2023,

https://hr.duke.edu/sites/default/files/atoms/files/Self-Assessment%20Form.pdf)

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VII. Conclusion

In conclusion, the Needs research and assessment of the strengths of HR in educational organizations is a beneficial resource that provides a detailed study and analysis of the needs and strengths of HR in educational organizations (through interview assessment). The study included the following target groups: teachers/trainers/educators and non-pedagogical/non-teaching staff (such as administrative staff, management staff, counsellors, pedagogical advisers, psychologists and other experts) from different educational/training organizations. The product is a useful tool for the identification of the needs and strengths of the abovementioned target groups and provides helpful steps and tips on how to create an HR Development Plan.

This resource is freely available online and translated into four languages – Bulgarian, English, Greek and Polish. It can be used to create an HR Development Plan for organizations.

In summary, the Needs research contributes to the improvement of competencies of pedagogical and non-pedagogical/non-teaching staff working in educational organizations (incl. in the sphere of career and professional development). It helps increase the professional capacity of staff working in educational organizations and improve their adaptability to the competitive and dynamic environment. It is a beneficial resource as it expands the knowledge and skills of staff/employees related to development and prosperity and provides a detailed analysis of future labor requirements in organizations.

Thanks to this product, the three partner organizations have developed their own HR Development Plans, which are detailed in separate documents.

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IX.   Appendices

Appendix 1: Structured Interview Template

Structured Interview Template

(WP3 A1)

Organization:...

Name……………………………………………………………………………..

Gender: M/F

Age:………………………………………………………………………………….

Profession:……………………………………………………………….......

.Please list at least 3 of your personal qualities:

1.……………………………………………………………………………

2.……………………………………………………………………………

3.…………………………………………………………………………….

II.   Please list at least 3 of your professional qualities and skills:

1.……………………………………………………………………………

2.……………………………………………………………………………

3.…………………………………………………………………………….

III.   What are your personal and professional goals?

…………………………………………………………………………….………..……

…………………………………………………………………………………………

…………………………………………………………..

IV.   In what direction would you like to develop your potential?

…………………………………………………………………………….……………

…………………………………………………………………….……………………

…………………………………………………………..

V.   What do you think are the current needs of school staff?

…………………………………………………………………………………………

…………………………………………………………………………………………

………………………………………………………

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VI.   What are your needs?

………………………………………………………………………………………………………
………………………………………………………………………………………………………
……………………………………………………………

VII.   What would you change about your working conditions?

………………………………………………………………………………………………………
………………………………………………………………………………………………………
……………………………………………………………

VIII.   What are the main challenges in working with students?

………………………………………………………………………………………………………
………………………………………………………………………………………………………
……………………………………………………………

IX.   What opportunities do you see for the development of school staff?

………………………………………………………………………………………………………
………………………………………………………………………………………………………
……………………………………………………………

X.   Do you think that school staff deal effectively with workplace stress?

Y/N

XI.   Do you think there is staff turnover among school staff?

Y/N

XII.   Do you feel your job is stable and secure?

Y/N

XIII.   Do you feel that you are provided with sufficient support at work?

Y/N

XIV.   Do you think that the current work environment contributes to your personal and professional development?

Y/N

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Appendix 2: HR Development Plan Template: Skills- based employee development plan

Example 1: Skills-based employee development plan

Employee goal:

Skills required:

Qualities and abilities to demonstrate:

Training activities to include:

This will cover online and/or face-to-face seminars as a minimum. Answer the questions: How can they learn best? What will inspire them or get them thinking differently?

Activities you might consider:

- E-learning modules and digital courses

- Face-to-face seminars

- Events or conferences

- Mentoring/coaching programs

- Books, journals and magazines

- Workshops

- Special projects

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Annex 3 - HR Development Plan Template: Results-based development plan

Example 2: Results-based development plan

This process starts with taking a good look at where you are currently at. What are the employee skills and competencies? What are their work values?

What do you want to achieve? Knowing where you want to go makes the next steps much easier.

Now that you have a clearer picture, it is now time to set some goals and create your Career Development Plan – goal summary.

Setting and Achieving Goals:

Goals	Skills or competencies needed	Resources needed	Activities	Status/ Key result
Short-range: 1. Gain additional skills in Microsoft Excel tasks.	- Import Data; Filter Results; Calculate Sum; Use Formulas; Manage Page Layout, etc.	- The Ultimate Guide to Using Microsoft Excel, Contextures.	-Attend a Course or Workshop aimed at developing Microsoft Excel skills.	- Increased effectiveness when working and using Microsoft Excel.
2.Gain more content knowledge in teaching.	-Critical thinking, listening skills.	-edutopia.org; Teachers Network.	- Enroll for a Seminar or Training aimed at developing teaching skills.	- increased effectiveness in teaching.
3. Become more motivated to teach.	-Self-management; adaptability.	-www. educationadvanced.com.	-Motivational Training and courses aimed at teachers.	- Improved motivation to teach and develop professionally.
Mid-range: 1. Create a teaching portfolio.	-Critical thinking; creativity.	-https://otl.du.edu/plan-a-course/teaching-resources/creating-a-teaching-portfolio/ www.indeed.com/career-	-Performance review; collect proof of student success; Request letters of	-Created teaching portfolio.

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2. Network with other educational professionals. 3. Mentor upcoming teacher.	-Communication skills, teamwork skills. -Leadership skills, flexibility.	advice/career-development/teaching-portfolio -https://learning-corner.learning.europa.eu/network-other-teachers_en School Education Gateway; e Twinning. -Mentoring Guide for Teacher Induction https://lincs.ed.gov/professional-development/resource-collections/profile-838	recommendation; organize the components. - Join a professional learning network, attend networking events. -Observation, feedback, attend a mentor program.	-Improved networking with other educational professionals. -Building a successful mentoring relationships; achieving the goals set during the mentorship.
Long-range: 1.Increasing students' grades.	1.Communication skills, adaptability, analytic skills.	1.Khan Academy; Tricks for Good Grades: Strategies to Succeed in School (R. Kurtis).	1. Use assessment to keep track of students' attainment; personalize lessons according to students' needs; Attend teaching courses.	1. Improved students' grades with at least half a grade.
2. Increased student participation in olympiads.	2. Skills to stimulate students to develop subject knowledge	2. www.worldscientific.com www.globalolympiadsacademy.com	2. Prepare students for the Olympiads; Informal learning activities.	2. 25% more participation in Olympiads in the following subjects: Math; Physics.
3. Increased participation in clubs of interest.	3. Skills to motivate students for participation.	3. https://scienceandliteracy.org/ideas-for-afterschool-clubs/	3 Group sessions with students regarding club choice; Interactive activities and games.	3. 50% more participation in club interests in the following subjects: Choreography, Arts.

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Annex 4 - HR Development Plan Template: Comprehensive Employee development plan

Example 3: Comprehensive Employee development plan

The comprehensive plan (adjust the timeframe as you see fit) breaks down goals and milestones by specific timeframes, and includes the:

- Training and development needs of employees
- Competencies and skills required to progress
- Milestones to reach or actions steps to accomplish
- Any resources required that are specific to the development plan.

	Training and Development Goal	Competencies/Skills To be Acquired	Employee Action Steps	Resources Needed	Timeframe	
	What specific workshops, seminars, mentoring, continuing education, etc. is needed?	What specific competencies/skills of the employee will be enhanced by completing the goal?	What specific steps must the employee take to acquire the competency or skill?	Money, Time, Staff, etc.	Start	Finish
Short-Range Critical development needs for present position (1 year)	1.Learn about current legislation, and best practices in special education	-Analytic skills, critical thinking.	- Participating in professional development in-services, webinars, and professional reading.	-Free online webinars and courses	09/23	11/23
	2. Establish and maintain a safe and orderly classroom.	-Focus, time management, organization skills	- set behavioral expectations for students, let them participate in the rule development. Let them practice the	- Provide a timer to assist students with staying on task during learning activities	09/23	10/23

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	3. Design instructional activities to meet the needs of individual learners.	-flexibility, open-mindedness, creativity.	daily routines. -Attend a district or local workshop on differentiated instruction. Plan with a grade level team focused on differentiated learning activities.	-examples of lesson plans that reflect the goal.	10/23	12/23
Mid-Range Important for growth within present or future position (2 years)	1.Improve technology use in the classroom.	- ICT and technology knowledge. An ability to incorporate technology in teaching.	-Talk with colleagues about what technology they use in the classroom. Speak to the IT department. Find and take appropriate training. Hold an informal workshop with colleagues to share knowledge. -Attend a relevant conference or seminar. Observational visit to another school. -keep new teachers informed on	- Staff: other colleagues, IT department, IT teachers.	10/23	04/24
	2. Address the individual learning styles of students and expand teaching methods.	-Knowledge of the different learning styles of students. An understanding of effective teaching methods.			10/23	04/24
	3. Assist new teachers in transitioning into classroom practice.	-leadership skills, teamwork skills, time management		-Staff: colleagues from other schools.	09/23	09/24
				- staff: new teachers, teacher		

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			new curriculum and policies; assess their professional growth and provide assistance. Attend mentoring programs.	assistants. Mentoring programs.		
Long-Range Helpful for achieving future career goals (3+ years)	1.Become a subject head. (Mentoring by a subject head needed)	-Expert knowledge in the subject. Communication skills. Leadership skills. Management skills.	- Carry out research by reading reports and completing a project of the needed knowledge. Shadow a current head of subject.	-Staff: Subject head for monitoring.	03/23	12/23
	2. Build a school culture which values collaboration and social emotional learning	- intercultural skills, emotional intelligence, empathy, tolerance.	-Attend culturally responsive teaching workshops. Counselling for students. Guidance	- Every staff (esp. Guidance counselor), Guidance counselor lessons.	03/23	03/24
	3.Level up credentials (be promoted)	-organization skills, listening skills, content knowledge	counselor lessons with targeted classes and students. -earn certifications, professional certificates, and degrees.	- degree programs, certification programs	09/23	09/24

For more information about the project:

e-mail: aypbvarna@gmail.com

web: https://behealthybg.com/en/project/

Social media: https://www.facebook.com/HealthyAtSchool