



Project 2022-1-BG01-KA220-SCH-000085347  
Healthy at school. Supporting the well-being and mental health  
of students and teachers / HAS, Erasmus+



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## Strategy for planning the professional development of employees in accordance with individual needs

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**Title „Strategy for planning the professional development of employees in accordance with individual needs“**

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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.



## II. Introduction

The current product – “Strategy for planning the professional development of employees in accordance with individual needs” is developed under Work Package 3 “Increasing competitiveness and employment in the field of school education”, Activity 2 “Creating a new approach and better support for competitiveness and employment in school education” (WP3 A2) of project “Healthy at school. Supporting the well-being and mental health of students and teachers / HAS”, funded under the Erasmus+ programme. Association of Psychologists in Bulgaria (APB), WYKSZA SZKOŁA BIZNESU I NAUK O ZDROWIU (WSBINOZ), Poland, Hristo Botev School (Bulgaria) and IMS Private School (Cyprus) contributed to the development of the product.

This product helped project partners to develop their own Strategy for planning the professional development of employees in accordance with individual needs. These strategies were piloted on 20 staff per organization or in total 60 staff. The results from the pilot implementation are described in a separate report.

The product was developed after an in-depth research and assessment of the needs of the staff in educational organizations in activity WP3A1. As a result of WP3A1 and WP3A2, a Training program for staff in educational organizations was also developed which is a separate document.

The main **users** of WP3A2 “Strategy for planning the professional development of employees in accordance with individual needs” are staff/employees in organizations (including educational organizations) such as teachers, educators, trainers, non-pedagogical staff, administrative staff, management staff, counsellors, pedagogical advisers, psychologists and other experts.

General objective: Capacity building of schools to work transnationally and between sectors

Specific WP objective: Better opportunities for career and personal development, increasing the professional capacity of teachers and other school staff according to individual needs.

Higher adaptability of school staff to the competitive and dynamic environment.



The main **purpose** of the product is to:

- Create a new approach and better support for competitiveness and employment in education;
- Support organizations (incl. educational organizations) in developing a strategy for planning the professional development of employees in accordance with individual needs;
- Provide methods for identifying individual needs / personal-motivational, potential and deficits, needs, etc./ and for identifying training needs;
- Stimulate the professional development of staff/employees in organizations (including educational organizations).

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

- Improve the competencies of pedagogical and non-pedagogical/non-teaching staff working in educational organizations (incl. in the sphere of career and professional development);
- Increase the professional capacity of staff working in educational organizations and improve their adaptability to the competitive and dynamic environment;
- Expand the multi-spectrum horizons of staff in educational organizations, their knowledge and skills related to development and prosperity.





### **III. The importance of planning the professional development of employees in educational organizations**

Employee development—often referred to as professional development or staff development—encompasses any professional training or continuing education that an employer facilitates to help workers develop their careers. It covers a variety of learning opportunities, including workshops, professional certificates, higher education courses and mentoring programs.

Prioritizing staff development ensures that team members' skills are developed in line with industry trends and best practices. And employers who invest in additional education that complements an employee's career trajectory can see higher retention rates, more engaged staff and greater revenue.

Professional development aims to improve the skills and knowledge of employees so that they can advance their overall career, not just build a skill set for a particular role. While it is ultimately the individual's responsibility to own their professional development, it is in the employer's best interest to encourage continued learning by ensuring that employees have access to internal and external learning opportunities (Heinz, 2023).

Professional development also signals competence on the part of the employer. Some industries actually require workers to hold certifications. And if the worker doesn't have the necessary certification, it looks bad for the employer — not to mention the legal challenges it poses. However, professional development can help workers obtain the necessary certifications and training for their industry. Professional development can be a tool for building a stronger team. Employers who encourage their employees to seek professional development opportunities in turn encourage higher productivity and job satisfaction.

Investing in employee professional development can develop the skills of the existing team and attract new talent to join with the incentive of a clear training and development plan. It helps employees stay abreast of industry trends to maintain a high skill level. Trends in industries move quickly and it is important that institutions keep up with the times. Continuing professional development can prevent potential stagnation by maintaining and improving



employee skills. Employees engaged in professional development are also more likely to stay engaged in their work and be enthusiastic about pursuing their goals.

Professional development is important because it has the potential to open up career opportunities, such as promotions. It helps to hone existing skills and learn new ones. It also helps them stand out from the pool of applicants; having completed professional development programs or additional industry certifications on a resume can go a long way in showing experience in the field.

Professional development is important to the growth and development of the modern educator. Today's education landscape is filled with multiple perspectives, technologies, and opportunities for students and educational leaders. The purpose of teacher professional development is to go beyond maintenance and to create sustainability and professional longevity.

As students today continue to change and evolve in terms of technology and access to information, the core values of being rigorous, fair and consistent in their learning remain true. For teachers, effective PD in the 21st century comes from recognizing this and finding ways to improve teaching and learning strategies.

In education, it is vital to know the importance of data-driven learning to ensure that students learn effectively and that teachers provide engaging and rigorous instruction. Access to engaging, rigorous and relevant PD for teachers is equally important for development, as is a consistent approach to learning and development. 21st century instructional practices must have components of technology, global learning, and the potential to impact a diverse range of learning styles. When considering 21st century PD for teachers and administrators, learning objectives must be tailored to the specific needs of the educator (Washington, 2019).

All educational organizations should be places where both adults and students learn. Teachers and administrators who routinely develop their own knowledge and skills model for students that learning is important and useful. Their continuous development creates a school-wide culture of learning and supports teachers' efforts to engage students in learning. An educational organization that organizes team-based professional development and expects all teachers and administrators to consistently participate—albeit for different purposes, at different times, in



different ways—demonstrates that it is serious about all educators performing at higher levels. As a result, the whole educational organization is more focused and efficient.

Good teaching is no accident. While some teachers are more naturally gifted than others, all effective teaching is the result of study, reflection, practice and hard work. A teacher can never know enough about how a student learns, what gets in the way of a student's learning, and how the teacher's instructions can enhance a student's learning. Professional development is the only means for teachers to acquire such knowledge. Whether students are high, low, or average, they will learn more if their teachers regularly engage in high-quality professional development. School leaders also improve through study, reflection, practice and hard work. Their training supports the learning of not only the teachers but also the students. When leaders know how to engage teachers, support staff and students in effective learning, the educational organization becomes a center of learning for all adults and students (Mizell, 2010).

Students never stop learning – and so do teachers. Continuing professional development helps teachers improve their understanding of how to deliver effective education and ensures they can adapt to the changing needs of students.

Keeping skills and knowledge up to date is a vital part of this. When teachers have confidence in the subject, they can simplify explanations for the less able and know what the more able need to do. It also makes a lot of logical teaching planning easier and helps teachers understand where they can use hands-on activities and resources to save time (Juniper, 2022).

Education is a never-ending process. It doesn't stop after getting a degree and starting a career. Through continuing education, career-oriented people can constantly improve their skills and become more competent in their work. In the field of educational administration, it is especially important for school administrators to encourage teachers to pursue professional development, not only to ensure the best learning outcomes for their students, but also to be more effective and satisfied in various other aspects at their jobs.

Some key results are the following:

### ***1. Students perform better***



Improving student outcomes is always a top priority for any good educational organization, and therefore equipping teachers with the necessary skills to do so is imperative. Educational technology, school district guidelines, and curriculum standards are constantly changing, making it a challenge for teachers to keep up with trends and best practices in the field. Professional development makes teachers better and more capable educators by enabling them to create relevant and personalized course instruction for today's students. It stands to reason that when a teacher pursues any type of professional development that is related to their subject area or teaching tactics, students are bound to benefit. And the research is there to prove it; studies show that professional development leads to better instruction and improved student learning when it is linked to the curriculum materials teachers use, the district and state academic standards that guide their work, and the assessment and accountability measures that evaluate their success.

## **2. *Teachers learn better ways to teach***

When educators discover new teaching strategies through professional development, they are able to return to the classroom and make changes to their lecture styles and curricula to better meet the needs of their students. However, these changes are difficult to evaluate because they are usually implemented gradually. Professional development for teachers makes them more effective in their course presentations and assessments by exposing teachers to new teaching methods, assessment styles, and record-keeping strategies. It goes without saying that teachers who are constantly developing and learning become better teachers and do a better job of teaching students. Lifelong learning opportunities not only help teachers' career growth, but also open up new avenues of learning for students, as teachers are able to introduce them to new forms of learning and are able to respond effectively to their needs.

## **3. *Better organization and planning skills***

In addition to hours spent on classroom presentations, much of teachers' time is spent on student assessments, curriculum development, and other documentation. Professional development training can help teachers become better at managing their time and staying organized. This



ultimately makes teachers more efficient and gives them extra time to focus on students rather than paperwork.

#### **4. *Industry knowledge and insights***

Students expect teachers to be experts in the subjects they teach. This means that teachers must be able to answer any question asked by a student. Professional development enables teachers to expand their knowledge base in different subject areas. The more professional development a teacher goes through, the more knowledge and industry insight he or she gains. Through professional development, you can improve the hard and soft skills in your job. Hard skills refer to job-specific knowledge that you can acquire through formal training or education. Soft skills are personal competencies, such as effective communication or skills that contribute to emotional intelligence.

#### **5. *Motivation***

It is easy for teachers to become burdened with the fatigue of teaching. Professional development gives them the opportunity to break out of their routine - they become a student instead of a teacher. This keeps teachers engaged because they feel like they are getting the professional help they need to be better teachers. Ultimately, professional development nurtures the talents of teachers who aspire to educational leadership positions, and teachers must learn from other experienced leaders to become effective future leaders themselves (Creech, 2023).

#### **6. *Earning potential and employability increases***

Professional development and continuing education offers both young and experienced professionals opportunities to increase their earning potential and future employability by increasing their knowledge and updating their skill sets. Professional credentials, certifications, and designations—most of which can be accessed and obtained online—also provide easy ways to increase a professional's value. Professionals with the right skill set who seek out and take advantage of professional development opportunities are certainly at an advantage over those who don't.

#### **7. *Networking opportunities are provided***

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Many professional development opportunities, such as seminars, conferences, and other networking events, allow professionals to branch out and meet others in their industry who may be able to help them with career opportunities in the future. These connections can lead to new opportunities, mentorship and support that can provide the next step in your career.

### **8. *Keeps professionals abreast of industry trends***

Professional development, continuing education and learning opportunities are great ways to keep up with industry knowledge and trends. Every professional industry is constantly evolving, so employees should take advantage of professional development and training opportunities to expand their knowledge base, learn new practices and techniques, and adopt new technologies. Technology has steadily become a critical tool in education, and since the COVID-19 pandemic shut down traditional classrooms, the need for it has increased tenfold. To respond to the changing academic landscape and discover new ways to reach students, many teachers are choosing to turn to tech-oriented professional development opportunities. Whether it is through courses, trainings or conferences, improving technological acumen is one of the best arguments for teacher professional development.

Teachers are tasked with updating their curricula to respond to the ever-changing social, political and cultural landscape. There are always new developments and innovations in education, which means new trends, skills and strategies to keep up with in the classroom. To do this, many teachers are turning to continuing education courses—on topics like mental health and restorative justice—that are current and designed to help teachers stay ahead of the curve in their careers (Upskillist, 2023).

### **9. *New skills***

Through professional development, hard and soft skills at work are improved. Hard skills refer to job-specific knowledge that you can acquire through formal training or education. Soft skills are personal competencies, such as effective communication or skills that contribute to emotional intelligence.

Developing both types of skills is important to achieving professional goals—and even some personal ones.



At its core, professional development is designed to help you do just that, grow professionally, in pursuit of new knowledge and skills to use in the classroom. With PD, teachers can bridge any skill gaps they may have—self-identified or perhaps from a recent performance evaluation—through innovative, cutting-edge courses that pique their interest in exciting new topics and deepen their connection to the teaching profession.

### **10. *Confidence and reliability***

Adding additional skills or certification from a professional development program to your resume is one way to boost your confidence in your skills and demonstrate your credibility to employers. A well-qualified employee attracts the attention of the employer. Employees who are invested in professional development show a commitment to their work and an interest in continuing to improve. Professional development can also increase your earning potential by increasing your value by earning credentials, certifications, and designations.

Professional development opportunities can expose new and experienced professionals to new ideas and experiences. Seeking these opportunities shows ambition and space to practice these new competencies.

### **11. *Leadership skills***

A confident employee is likely to be an enthusiastic employee as well. If you take the step to grow and develop your skills, the incentive to seek additional opportunities can continue to expand along with it.

If you're an employee who wants to advance your career but isn't sure how to do it, professional development can encourage you to put your hand up for leadership opportunities you might not have otherwise sought (Parsons, 2022).

In order for the educational organization to become a flexible, adaptive and learning organization capable of responding adequately to changes in the socio-economic conditions in which it exists, it must apply a systematic approach to the strategic management of its human resources. Applying SHRM can help principals develop new skills (such as creativity and innovation in managing organizational change) and develop strategies for managing the



educational organization as a complex and adaptive system in an unpredictable and uncertain external environment.

A typical example of how changes in the external environment affect the development of the educational organization is the COVID-19 pandemic, which affected the academic year 2019/2020. Efforts to reduce its spread through social distancing and self-isolation led to the complete closure of all educational organizations in the country. As a result, students switched from traditional to online form of education. A key factor for a successful and rapid transition is the ability of educational organizations to react in time and adapt to changing circumstances - readiness to manage new realities and take advantage of opportunities, which is achieved through effective implementation of the SHRM. Second is the recognition that teachers play a major role in student achievement, therefore the success of educational organizations in meeting the ever-increasing expectations of student achievement depends primarily on the competence and effort of their teachers. As D. Gospodinov points out, "the quality of the educational product created by the secondary education system cannot exceed the quality of the teachers involved in the learning process" (Gospodinov, 2015). In this case, the SHRM can be considered as a means to improve the activity of teachers in achieving educational goals.

Although teachers have the greatest impact on student outcomes, human resources activities are often the actions that make this learning possible. For example, effective teachers can be recruited, appropriately compensated, retained, and developed to further increase student outcomes through SHRM. It is obvious that effective educational organizations are those that develop as a product of clearly planned processes in the form of strategic management. The next reason is related to the quality of education. One of the significant reasons related to the differences in the quality of education between educational organizations is the quality of management practices applied (Dikova, 2020).

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## IV. Research and identifying staff individual and training needs

Professional development is usually connected to methods and strategies that aim to increase employees' skills, competencies and knowledge. There are many factors that determine staff's individual needs (especially in the area of training) such as changes in the professional sphere and innovations that have been implemented recently. It's very important to identify individual employees' needs in terms of training and professional development, because this can help with the planning of strategies for the achievement of the organization's main objectives (Indeed, 2023).

### 1. Methods for identify individual needs of employees/ staff

There are various effective methods for identifying individual needs of employees / staff. Some professional fields (such as education and training) evolve quickly and demand continuous development of competencies from experts. It's therefore important for the organization's workforce to have the relevant skills and knowledge. Some of the most popular methods, especially, in the area of training and development, are as follow:

#### *1. Defining the expectations for the professional roles*

To determine employees' needs it is important to identify the expectation for the specific professional role (for example, teacher). The expectations serve as performance benchmarks. According to Mehlman (2022), performance benchmarking is about comparisons. It measures the organization's performance and compares it to others in the field in terms of sales, products, services, growth and other.

The measurements applied in the benchmark can be specific to the professional role. For instance, sales representatives may use sales metrics such as conversion rates, average deal size and average profit margin). However, other roles do not require many metrics, thus, the performance benchmarks may be in terms of competencies and skills for various job responsibilities.



When benchmarks are identified, the industry's description of the professional role must be considered. This can shed light on the responsibilities associated with the job. If the description does not include a number of typical obligations, then the benchmark of the organization may be too low. To raise it, additional responsibilities may be delegated to staff / employees, but this can require programs for training and development (Indeed, 2023). Identifying the benchmarks can support the process of determining potential needs, however it mainly provides a comparison point when assessing the performance of a particular employee.

## ***2. Monitoring employee performance***

Monitoring employee performance and comparing it against the abovementioned benchmarks can shed light into the requirements for specific job positions. If during this process of monitoring, it is found out that a certain benchmark is not being met, this may mean that staff require additional training and development. For instance, if sales representatives are not achieving the desired conversion rate, this may mean that communication processes need to be improved (e.g., via a training program to develop skills and competencies).

Performance assessments of staff can also help with determining individual needs of employees that in turn will benefit the organization. If evaluations are conducted on a team, and one of the team members is not performing well, this may indicate that the concrete person needs additional training and not the whole team. However, if the performance of the whole team is low, this indicates that either the operation processes need to be improved or the staff needs to attend additional training (Indeed, 2023).

## ***3. Collecting feedback from employees / staff***

Another effective method for identifying individual needs of employees / staff is collecting feedback from them. It's crucial to obtain honest answers via anonymous feedback. If employees are asked directly and not anonymously about their opinions on work processes, their responses may be biased. That is why, a survey can be a very effective method to collect honest feedback from staff. It is recommended to ask specific questions (including about current training programs and employees' expectations).



In addition to this, performance reviews can also be beneficial, although they are not anonymous. If employees are honest, this can shed light on their individual needs (including in terms of training and development). For instance, if a performance review shows an employee is not performing well, one might ask them why they think they are not meeting certain expectations for the job position. Their answer may include lack of sufficient training and development. If this answer is similar to the answers of other staff, this can mean that the whole team organization's training program must be improved significantly (Indeed, 2023).

#### ***4. Conducting comprehensive analysis***

To identify individual needs of employees, an important step is to perform a comprehensive analysis and determine the training requirements of staff. The analysis should include operational and industry aspects as well. Helpful information can be obtained by analyzing thoroughly performance reviews, job descriptions, current training programs in the organizations and even competitors. For instance, if one analyzes the current training programs, and sees that the performance of staff is not improving, this may mean that the employees need additional training and development.

An important aspect of providing staff with the training they need is the analysis of future skills and requirements (Indeed, 2023). Planning for eventual changes is crucial for guaranteeing the organization's readiness for change. Some professional fields (such as the field of education and training) continuously evolve, and may involve additional responsibilities and the upgrading of competencies for specific jobs. If possible future changes in the professional field are identified via in-depth analysis, then the training and development needs can be determined to guarantee that staff can adapt to these changes.

#### ***5. Using personal development plans***

Another effective method to identify individual needs of employees is the creation of a personal development plan which is a combination of a self-evaluation and action plan. According to Sayed (2022), a personal development plan is a framework that allows an individual employee to identify their needs, objectives to meet them, and pinpoint the resources necessary to achieve this. The main focus is on employee development.

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In the process, employees might review their strong and weak sides and use this information to set objectives. Then, they may identify valuable steps to achieve the objectives. For instance, a sales representative evaluates their strengths and weaknesses and identifies opportunities to increase their knowledge of customer success management. They set specific objectives, such as achieving a specific repeat purchase rate. The employee then develops an action plan.

A personal development plan (PDP) can be beneficial for increasing motivation for professional development. It can also help identify the employee's individual needs because they he/she makes a detailed review of their own needs for development. However, a negative side is that the PDP may be a more time-consuming method of obtaining employee's feedback that requires a lot of resources compared to a survey (Indeed, 2023).

### ***6. Conducting focus groups***

The next valuable method for identifying individual needs of employees / staff is through conducting focus groups. According to Ryba (2019), in an employee focus group, employees participate in a guided discussion on a particular topic. Focus groups are also often applied as a method to improve employee engagement. Many organizations use focus groups to gather employee opinions. A focus group is generally a planned group discussion (in this case between employees. It includes an external facilitator who monitors and guides the discussions. The facilitator is external, because an internal facilitator might be a cause of bias.

In addition to this, the objective of the focus group is to obtain honest feedback from staff of the organization. The positive side of this method is that it encourages constructive discussions and aims to generate solutions.

When planning the focus group, one needs to choose participants / employees and a facilitator along with some topics that need to be addressed. In general, any subject can be discussed as long as it is related to work. However, it is recommended to prioritize discussions according to the current work processes. The results from the focus group can provide valuable feedback from staff regarding the training and development program and how it can be improved (Indeed, 2023).



## ***7. Applying mentoring programs***

Mentoring programs can be very effective for identification of individual employee needs (including in the field of development and training). Mentoring programs involve assigning an employee to a one with more experience. Via this method, important work processes can be discussed, appropriate goals can be set and collaboration on various work tasks can be achieved. In addition to this, mentoring programs may involve attending conferences.

The mentor's responsibility may be to conduct performance reviews and identify the strengths and weaknesses of the employee. This can be very valuable for identifying individual needs of staff (for example, in terms of additional training).

However, it should be mentioned that mentoring programs typically focus on a employees involved in a succession plan. This method is a particularly effective way to determine training and development requirements of staff. Compared to surveys or PDPs, this is the method requiring the most resources (Indeed, 2023).

### ***Additional tips for identifying individual and training needs of employees / staff:***

Learning the individual needs of employees is related to knowing the particularities of the professional field, of the workplace, of different work procedures and processes, and, most importantly, the employees themselves. Here are some additional tips on how to identify individual needs of staff (Donahue, 2016):

- Design a performance review for each job position at the organization. Include every skill and competence which is required to do that job effectively.
- Complete a performance review for each employee every year. Conduct a meeting with each employee with the aim to discuss the performance review. Also discuss the strong and weak points during the meeting. Listen carefully to the employee's questions, concerns and recommendations.
- Implement trainings to increase employee knowledge, skills and competencies. The most experienced staff can conduct the trainings for better effectiveness. The trainings should focus on areas that are in need of improvement (according to the performance review).

- Talk to staff throughout the year. Encourage each employee regardless of their job position to be open and honest about their concerns and recommendations.
- Instruct all of trainers and supervisors to implement an open-door policy. Conduct meetings with them each week to discuss the current needs of employees.

## **2. Structured interview as a tool for identifying individual and training needs**

An instrument that can be used as a method for identifying individual and training needs of employees is the Structured interview assessment of the needs and strengths of Human Resources (HR) in educational organizations, including higher education institutions (see Appendix 2 in the Appendices section). A specific structured interview for this purpose was developed as part of project “Healthy at school. Supporting the well-being and mental health of students and teachers / HAS”, under Work Package 3 Increasing competitiveness and employment in the field of school education, Activity 1 Needs research and assessment – a study of the strengths of HR.

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 lines 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 of the current workforce.

The interview’s aim is to identify the needs and challenges of those working in the educational field. The target groups can be teachers, pedagogues, lecturers, trainers, administrative staff (accountants, administrators, etc.) and other educational organization staff (for example, school counselors, pedagogical advisers, speech therapists, psychologists). The main goal of the interview is to obtain objective information about the perceived needs, challenges and experiences of educational organization staff in their work, and to understand what supports and encourages their personal and professional development. The issues that can be analyzed



include different aspects of their working environment, goals, needs and development opportunities.

In addition to the abovementioned goals, the purpose of the interview assessment is to evaluate the qualities, skills and goals (both personal and professional) of the educational staff, their current needs, their current working conditions, their main challenges in working with students / trainees, their opportunities for development, and other. 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 interview is a beneficial tool because it can represent the views of the employees and provide valuable information about their perceptions of working in an educational environment. This can serve as a basis for action and decision-making aimed at improving working conditions and meeting the needs of educational organization staff.

The interview can also provide important information that can be useful to the school management team and other stakeholders in formulating policies and programmes for staff development, improving the working environment and providing appropriate support and training. This can serve as a basis for change and improvement of educational practices to achieve better results and development of education.

There are several steps as to how to apply the structured interview:

- Preparation and planning (identifying key areas to be addressed);
- Selection of participants for the interview (incl. teachers, administrative staff and other educational organization employees);
- Conducting the interview (participants respond to the questions, providing their opinions, views and experiences. Interviewing can be done individually or in groups, depending on preference and available time);
- Data collection and processing (the researchers analyse the responses, extracting major themes, trends, and general conclusions);



- Analysis of results –quantitative and qualitative analyses should be conducted to identify key observations and trends. Results should be presented in numerical and qualitative formats that are suitable for interpretation and discussion. The analysis can provide an overall picture of the state of work with education organization staff and can offer recommendations for improving working conditions and meeting staff needs.

It is very important after the conducting of the interview to do a quantitative analysis of the data collected in order to draw important conclusions. This analysis can be useful in planning programs and activities that meet the different individual and training needs and preferences of education workers. This may also have important implications for influencing decision-making and the dynamics of work in the educational organization environment.

Another substantial aspect is to do a qualitative analysis of the data from the interview in order to draw conclusions. It's very important to correctly understand and analyse the data to improve the educational process and working environment in educational organizations, which is one of the main goals of the interview.

The data can be used to inform educational organization staff development opportunities. The qualitative analysis will help to derive key observations and correlation of said opportunities. This will support the understanding of where the interest of educational organization staff is focused and which areas are of particular importance to them. The analysis can focus on several directions and key areas:

- Qualifications and training- external qualifications, updating facilities and visual aids, international training, opportunities to participate in training, internal qualifications, maintaining professional competence, continuous training according to needs, courses on selected topics, internal qualifications. These present opportunities to expand the professional skills and competencies of educational staff through training and specialised programs.
- Intersectoral, multidisciplinary and international opportunities - implementation of project activities, realisation of interdisciplinary links, exchange of experience and good practices with colleagues including international. These highlight the importance of

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broadening the horizons of educational staff beyond the traditional confines of the education system to complement and enrich their experiences.

- Personality development - 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, new skills, practices. This includes aspects such as self-improvement, personal growth and developing leadership skills.

Analysis of the data from the interview is also important in order to identify some key aspects that create challenges for educational organization staff in interacting with students. The qualitative analysis can also focus on several other points such as:

- Student behaviour - aggressive behaviour, work to understand the child and his / her 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. This may also include discipline issues, lack of motivation, student conflict and other behavioural challenges.
- Motivation and desire - 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. This may also include difficulties in stimulating and sustaining student interest in learning, as well as challenges in motivating different groups of students.
- Work with parents and individual approach - dynamic working environment, individual approach, parent-teacher-student mediator, negative evaluation of parents influencing students, relationship with students and their parents, relationship with parents. This may also include communication challenges with parents, the need to understand and respond to individual student needs and differences.

Afterwards, from an analysis of the data presented on the needs, challenges and opportunities of educational organization staff, average recommendations can be made for improving working conditions. These recommendations can be made with the goal to support the



professional development, well-being and effectiveness of educational organization staff and can focus on the following spheres / directions:

- Training and qualifications - 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. 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.
- Material conditions and equipment - the aesthetic environment of the classroom, hygiene, time management and efficient allocation of resources, different materials to work with students. This can include providing sufficient resources, books, technological equipment and other tools that support quality teaching and learning processes.
- Reward, support and motivation - pay / remuneration, support and motivation of educational organization staff.
- Microclimate and well-being - physical and mental well-being of staff, 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. This can also include ways to create a supportive and enjoyable work environment, appropriate interpersonal relationships, collaboration and communication, and developing strategies to deal with stress and conflict.

Other important aspects on which the analysis needs to focus on are: dealing with stressful situations at work; staff turnover and job stability; sense of job security; support provided to educational and non-educational staff; work environment and personal-professional development, etc.

The analyses can help to identify the main challenges and needs of educational organizations staff and provide recommendations and measures to improve working conditions and staff

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support in the educational environment. At the end, it is important to make conclusions and recommendations on the basis of the analysis of the data. The conclusions can focus on the following essential areas:

- Personal and professional qualities and skills of staff in educational organizations (and their development, incl. through training);
- Personal and professional goals and aspirations of staff in educational organizations;
- Potential development (for example in the sphere of digital and computer technologies, languages and creative activities and other important sphered for developing staff's potential);
- Needs of staff from the educational organization (for example, a need for developing language and digital competencies, improving facilities, increasing remuneration, improving microclimate and well-being, additional support in the areas of training, infrastructure and working environment, etc.)
- Performance evaluation and conditions.

The last important step is to make recommendations for education professionals based on the results from the interview. The recommendations can focus on the following important areas:

- Personal and professional development - opportunities for improvement and development, incl. by providing training and qualifications in areas that are relevant to staff from educational organizations. For example, this can include training in digital and computer technology, languages and creative activities; specialist training to help staff understand and respond to students' needs, etc.
- Improving working conditions for staff in educational organizations - for example, by providing additional resources and support, improving facilities and equipment necessary for teaching and learning, exploring opportunities to increase staff pay, providing competitive salaries and additional incentives to motivate and retain them in the system, etc.
- Overcoming the challenges of working with students – for example, via assisting staff in educational organizations, providing support and training in behavior and



conflict management, building a system to motivate and support students;  
developing a strong relationship between staff and parents, and others.

The implementation of these recommendations will help to develop staff in educational organizations, 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.

With the abovementioned steps, the structured interview method can contribute to creating a stable and supportive working environment in which staff can develop and achieve the best in their work performance. More information about the source can be found in the product WP3A1 Needs research and assessment of the strengths of HR in educational organizations, prepared as part of project 2022-1-BG01-KA220-SCH-000085347 “Healthy at school. Supporting the well-being and mental health of students and teachers / HAS”, funded under the Erasmus+ programme.

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## V. Selection and implementation of training programs based on needs

After identifying the individual needs of employees via the abovementioned methods, the next step is the selection and implementation of training programs based on the determined needs of staff.

Effective employee training programs are created by following a systematic, step-by-step process (Explorance, 2023). Often one-off training events or initiatives do not achieve the organization's objective and do not meet the employees' needs. The most effective method to do this is through ongoing training conducted either online, or live (the options need to be carefully considered whilst taking into account the increasingly hybrid work environments).

From the perspective of human resources, an employee training program is defined as an initiative by the HR department to develop the skills, knowledge and competencies of organization staff. Training programs are an important part of the experience of employee because they support work performance, productivity, and work motivation in the professional field. It is vital, that they are well-designed to be beneficial for both the organization and its staff. When properly selected and implemented, training programs can contribute to the retaining of employees in the organization, increased productivity and happiness in the workplace. Employees who attend effective trainings, often get promoted or receive higher rewards / compensation, and have greater satisfaction at work.

### **Steps to selecting / creating and effective training program based on employee's needs:**

Not all training programs look alike. In order to be effective, they need to be carefully designed, selected and implemented which involves good planning and strategy. This process also requires having a clear vision and goals, and taking the necessary steps to achieve them. Here are a few successful steps to selecting and implementing a training program according to employees' needs (Explorance, 2023):

- *Evaluating training needs of employees / staff:*



The first step is to identify and evaluate the needs of employee / staff in the organization. This can be done via the methods outlined in Chapter II Methods for identifying individual needs (for example, via needs assessment or individual development plans to help determine which employees are in need of additional training, what kind, and which are the most effective ways to conduct it).

It is not recommended to create the training program from scratch (without having predetermined objectives). Another important step is to assess which are the priority areas that the training program needs to focus on, and to conduct a detailed assessment of the training needs. This involves identifying skill gaps, specific requirements for the job, and areas that are in need of improvement. Input can be gathered from employees/ staff, supervisors and HR experts in order to identify the priorities of the training.

- This can be done via asking the following questions:
- What areas in the organization will benefit from training at the moment?
- What issues are you trying to solve through the training?
- Who will benefit the most from the training?

To answer these questions, one can include employee performance reviews and different types of surveys such as employee engagement surveys, and exit surveys. The data also needs to focus on the employees' experiences and not only the organization itself. When the needs of staff are identified, it becomes easier to set the training goals (Explorance, 2023).

When do training needs arise? The main goal of the training is for employees / staff to acquire that level of performance, behaviour and attitude, which leads to achievement of the objectives of the organization. Therefore, training needs arise when there is a condition or requirement to move to a particular level of performance, behaviour and attitude. According to Mohanlal Sukhadia University (2023), training needs arise in the following circumstances:

- When existing levels of work performance, behaviour and attitude of employees / staff are not contributing to the success of the organization;
- When the motivation level and morale are low among the employees / staff in the organization;



- When there is a special need because some technological innovation implemented within the organization;
- When employees / staff convey to the organization about the key areas in which they need improvement;
- When there is a need for increasing the knowledge of employees (this may also be due to legislation);
- When the strategy of the organization demands new orientation in knowledge, skills, competencies attitude or behavioral orientation of its employees / staff;
- When there are changes in policies, systems, priorities, procedures, expectations and focus in the organization;
- When there are external changes that have an impact in the organization.

The identification of training needs and implementation of training programs would vary from organization to organization. However, even if the approaches of the organizations are different, there are a variety of common steps such as: taking a qualitative and quantitative inventory of existing manpower; making forecasts and analyses of future requirements considering retirements, transfers and other factors; searching for sources of talent within and outside of the organization; and preparing a strategy for development for current and future employees / staff (Mohanlal Sukhadia University, 2023).

- ***Setting training and development objectives:***

The assessment of training needs (organizational, task & individual) can support the identification of current gaps in training initiatives and in employee's skills, competencies and know-how. These gaps should be carefully analyzed, prioritized, and this can provide further information for setting the training objectives.

It is well-known that a training program must have clear objectives. Objectives are also related to the mission of the organization. These also help employees to be aware of their own objectives in relation to the organizational objectives (Mohanlal Sukhadia University, 2023).

Trainings usually have the following objectives:

- To help staff in gaining knowledge and skills of a particular topic;

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- To help bring about a positive change in the behavior and attitudes of employees;
- To help employees develop their potential in the professional field;
- To support the communication between employees;
- To enhance the capacity of staff and increase their problem-solving skills;
- To support the process of learning and professional growth;
- To help close the gap between expected level of performance and the actual level of performance.

Objectives need to be clearly expressed in behavioral terms. They have to be expressed in terms of measurable quality, which can be seen in action. According to Mohanlal Sukhadia University (2023) “A behavioral objective defines the standards of acceptable performance”.

Here are also some requirements that need to be met at this stage:

- Clearly state the goals and expected results of the training;
- Apply the parameters of the SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) methodology;
- Adjust with the organization’s broader objective and contribute to it;
- Offer a variety of options for hybrid, in-person / live, and online training programs;
- Identify possible barriers to the training (for example, do employees need to take time off to attend the training?).

Every employee training program aims to make employees more successful. To achieve this, the program needs to have set clear and measurable objectives. It is also very important to determine what skills, competencies and knowledge employees should gain and describe the expected results (Explorance, 2023). The set objectives are crucial for the designing of the content of the training program.

- ***Developing a training action plan:***

The next important step is to develop a detailed training action plan that includes learning theories, instructional design, content, and other training materials. This also involves creating the separate training modules to be engaging for participants in the training, whilst also being



in line with the goals of the organization. Different methods such as workshops, e-learning platforms, and others can be implemented in order to answer to the variety of needs of employees.

The next stage is to evaluate the resources that are needed to implement the training program successfully. This can include trainers / facilitators, training materials, technology tools, etc.

The according budget needs to be allocated for the provision of these resources.

The third step is to develop a timeline including the order and duration of each selected training module. Important factors that need to be taken into account are availability of employees / staff, work schedules, and priorities for the organization (Explorance, 2023). After the development of the timeline, it needs to be communicated to all employees that will participate in the training itself. Many organizations pilot their training initiatives and collect feedback from employees in order to make improvements before the training program is implemented.

- ***Implementing training initiatives / programs:***

The next stage is the implementation stage. The implementation of the training program should consider the timeline, engagement of staff, goals / objectives and resources (such as facilities and equipment). The progress of participants must be monitoring during the training to guarantee that the training program is effective (Explorance, 2023).

According to Mohanlal Sukhadia University (2023), the implementation of training programs involves: choosing the location / venue and organizing training and other facilities; scheduling the training program; conducting the training program itself; and monitoring the progress of participants.

Potential issues may arise from participants being wrongly chosen; participants being insufficiently prepared and motivated to do the training; the course's content and applied training methods being ineffective; the objectives being unsuitable; the training program not being related to the organizational context.

During the training, employees must be sufficiently motivated and engaged. The facilitator / trainer is responsible for leading them towards the set goals. In addition to this, the training has to be in accordance with the level of participants' experience, age, qualification, knowledge, current skills and competencies.

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- ***Assessing the training:***

The last step is the evaluation and monitoring of the training program. This is done in order to establish whether the program has been successful and if it has met the set training objectives. Each training module should be properly assessed using different measurement strategies. After the evaluation, the training program can be amended if the objectives were not achieved.

These steps provide a holistic approach to selecting and implementing training programs. The steps are related to one another, providing a wider scope for the improvement of the training itself.

In conclusion, training programs are essential for the success of the organization and its employees / staff. First of all, they develop employees' skills, competencies and knowledge that are necessary for them to do their job. In addition to this, effective training programs improve productivity, work performance and motivation for professional development. Furthermore, they increase employee engagement and job satisfaction which leads to lowered attrition and a more positive work climate.

By following these important steps for the selection and implementation of training programs based on employees' needs, the organizations demonstrate their commitment to improvement and create opportunities for career development and improved motivation at work. Moreover, effective training programs allow organizations (regardless of the field) to adapt to technological advancements and other innovations, guaranteeing that their staff remains knowledgeable, skillful and competent (Explorance, 2023). In the end, a well-implemented training program not only improves work performance but also contributes to the success of the organization itself.

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**Project 2022-1-BG01-KA220-SCH-000085347**  
**Healthy at school. Supporting the well-being and mental health**  
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## VI. Innovative approaches for providing better support for competitiveness in education

### 1. Innovative approaches in Bulgaria

There are numerous innovative approaches for providing better support for competitiveness in education in Bulgaria. One such innovative approach is **the Strategy for the development of higher education in the Republic of Bulgaria (2014-2020)** which includes the below mentioned goals:

*“Improving access and increasing the share of higher education graduates.*

To achieve this goal, the following activities and measures are implemented:

- Improving the student and doctoral lending model to create financial incentives for higher achievement by creating student loan repayment relief.
- Improving the system for providing scholarships by differentiating the method of providing and the amount of student scholarships - e.g. social scholarships, scholarships for excellence and scholarships for success; as well as by providing higher scholarships in strategic directions for the country.
- Expanding access to HE (Higher Education) through forms of lifelong learning and electronic forms of distance learning.

*Substantial increase in the quality of higher education and its compatibility with the European higher education systems in order to occupy a worthy place in the EHEA.*

To achieve this goal, the following activities and measures will be implemented:

- Introduction of strict control mechanisms on the part of the state to guarantee the provision of quality higher education by all higher education institutions and the real application of the criteria for obtaining the bachelor's and master's degrees and the doctor's degree.
- Improvement of the accreditation model and the rating system of higher schools to ensure an objective assessment of the quality of training in terms of the level of training (basic, specialized, practical, soft skills, participation in scientific activity) and the realization of the graduates.



- Differentiation of funding according to the quality and realization of graduates in each professional direction.
- Differentiated provision of the subsidy for scientific activity of VU based on scientific results.
- Providing opportunities for the qualification of teachers and postdoctoral students, especially in foreign language learning, new teaching methods and ICT, by continuing the measures financed during the previous program period.
- Activation of forms for evaluation of the quality of teaching by students and academic staff.
- Reforming curricula and learning content:
  - A. Stimulating renewal of curricula and programs;
  - B. Stimulating the internationalization of academic programs and e-learning;
  - C. Encourage disclosure of more joint programs;
  - D. Encouraging the growth of foreign language curricula.
    - Improvement of the system for admission to higher education institutions according to the results of the evaluation of the professional fields.
    - Consolidation of institutional and program accreditation.
    - Further development of the practice of external evaluation of the quality of higher education, including with the participation of foreign experts.
    - Regulating the possibility of alternative assessment by authoritative European accreditation institutions, e.g. agencies - members of ENQA and listed in EQAR, with the final accreditation being given by NAOA.
    - For the purposes of accreditation, the acceptance of each teacher as a member of the academic staff for only one HEI.
    - Adoption of a new Classifier of the fields of higher education and professional fields, which is fully consistent with the international classifiers ISCED 2011 - UNESCO and Eurostat Fields of Education and Training, in order to synchronize professional fields and scientific specialties (doctoral programs) with the Classification of fields of Education and Training 2008 and with the National Classification of Occupations and Positions.

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- Strengthening the control for the presence of a working System for the accumulation and transfer of credits and mobility during accreditation.
- Ensuring full portability of national grants and student loans within the EHEA.
- Optimization of procedures for recognition of comparable educational periods and degrees.
- Building a sustainable and effective connection between higher education institutions and the labor market and achieving a dynamic match between the demand and supply of specialists with higher education
- Using the forecasts for the demand and supply of labor in Bulgaria, developed by MTSP, in determining the needs of specialists with higher education and planning admissions to higher education institutions.
- Create a competency profile for each major.
- Encouraging the dialogue between higher education institutions and business regarding the content of training, by continuing and expanding the measures financed during the previous program period.
- Targeted financing of areas strategic for the country, for example for higher scholarships, for practical training in a real working environment and for building a modern educational base in these areas (based on certain criteria).
- Financial incentives for building scientific infrastructure in partnerships with business for the specialties in demand.
- Funding of student internships and internships during training, through the web-system of the Ministry of Education and Culture - <http://praktiki.mon.bg/sp> and other similar systems for connection between higher education institutions, colleges and employers and creation of additional incentives for employers, providing conditions for practical training and internship, after completing the education.
- Building a working and effective mechanism for evaluating the professional realization of graduating students.
- Creation of a common information network of career centers, graduate associations, alumni centers, as well as increasing their capacity.



Stimulation of scientific research activity in VU and the development of innovations oriented towards the market economy

- Strengthening the potential for scientific research and innovation development in higher education institutions and on this basis - the integration between them.
- Promotion and optimization of the integration of scientific research work in BAS and SSA with higher schools and regions (the national network of regional academic centers for applied science built in 2012-2013 will be strengthened and stimulated, in partnership with VU and local business and in accordance the specificity and potential of the respective region);
- Stimulation of the integration of the scientific and innovative activity of the higher schools in Bulgaria with the national and European business.
- Increasing the funding of universities for conducting all types of scientific research.
- Modernization of the existing scientific infrastructure and educational research laboratories and creation and development of regional scientific infrastructures and national units - partners of the European scientific complexes.
- Creation and development of centers of excellence and centers of competence.
- Differentiation of the subsidy for scientific activity for HEIs based on objective indicators of scientific results - number of published and referenced scientific articles in international databases, number of received citations according to these databases, number of international patent applications filed, etc.
- Introduction of a restrictive threshold in the provision of a subsidy for scientific activity (suspension of the subsidy for scientific activity of universities with poor scientific results).
- Stimulation of publication in scientific journals included in the global referencing, indexing and evaluation system.
- Stimulating the inclusion of students in research, project and consulting teams.
- Normative regulation of the status of postdoctoral fellows and stimulation of the inclusion of doctoral students, postdoctoral fellows and specialists in scientific research.
- Support for scientific projects in which there is interest from leading companies.





- Regulation of the economic activity of VU and removal of regulatory and administrative obstacles for such activity, including the creation of spin-off companies and the implementation of technology transfer.
- Building a mechanism for co-financing scientific teams that have won European and international projects.
- Promotion of joint research projects with leading universities from Europe.
- Support for the access and participation of Bulgarian scientific organizations and higher schools in various European technological platforms, joint technological initiatives and in the European Institute for Innovation and Technology.
- Attracting scientists from other countries and Bulgarian scientists working in foreign scientific organizations and universities.”

Used source:

STRATEGY FOR THE DEVELOPMENT OF HIGHER EDUCATION IN THE  
REPUBLIC OF BULGARIA FOR THE PERIOD 2014-2020.

<https://www.strategy.bg/FileHandler.ashx?fileId=5026>

Another innovative approach for providing better support for competitiveness in education in Bulgaria is the **National Program “Motivated Teachers”**. It comprises of different modules and activities as described below:

NATIONAL PROGRAM "MOTIVATED TEACHERS"

“Module 1. Activities aimed at teachers new to the system (with or without acquired professional qualification "teacher") with a view to providing pedagogical specialists in schools with a permanent shortage of such.

Activity 1. Activities that apply to specialists without a pedagogical qualification:

- Recruitment and selection according to an established competence model;
- Training according to a pre-approved program of a higher school for the acquisition of the professional qualification "teacher" and "teacher of...", in accordance with the requirements of the regulatory framework in the country within one to two years, depending on the acquired

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professional qualification. The training should provide the basic pedagogical and psychological knowledge and skills needed for effective teaching of the participant's choice;

- Intensive upgrading theoretical and practical training before entering school, oriented towards highly effective teaching to meet the relevant needs of schools with a permanent shortage of pedagogical specialists;
- Appointment in target schools, where there is a permanent shortage of pedagogical specialists from target specialties;
- Building training and supervision by a specialist with experience in practical support of beginning teachers during the school years;
- Training of teacher-mentors according to approved programs;
- Individual support from a teacher-mentor for the newly appointed teachers.

Activity 2 Activities that refer to specialists with already acquired professional qualification "teacher of..." / "primary teacher", but without experience in school education.

- Recruitment and selection according to an established competence model;
- Building theoretical and practical training before entering school,
- oriented towards highly effective teaching to meet the individual needs of students with low results and low socio-economic status and working in vulnerable communities;
- Assignment to target schools where students are from vulnerable communities and have low results and motivation to learn and/or there is a shortage of specialists from target specialties;
- Training of teacher-mentors according to approved programs;
- Individual support from a teacher-mentor for the newly appointed teachers.

Module 2. Activities aimed at acquiring additional professional qualification "teacher of..." and "resource teachers" by teachers employed in the system.

- An information campaign in each of the regions by holding workshops and conferences, forums to popularize the goals and activities of the program.
- Selection, approval and submission to the Ministry of Education and Culture of a list of the designated participants for inclusion in the program.



- Notification by the Ministry of Education and Higher Education of the higher schools about the approved participants who optionally submit documents for enrollment for a one-year study to acquire an additional qualification "teacher" in a subject of study.
- Provision of funds in the amount of BGN 1,200 for one participant for a one-year training to acquire an additional "teacher" qualification in a subject and resource teachers.
- They are appointed in a school to the position of "teacher" with the professional qualification "teacher of..." and form part of their annual norm of teaching employment in a subject in which they are not specialists;
- Perform standard teaching work by teaching a subject in which they are not a specialist within or outside of it, in the same or another school, or perform standard teaching work by teaching as non-specialists in more than one school.

Module 3. Current teachers and specialists with higher education without previous teaching experience and/or qualification, who demonstrate motivation and attitudes to work in a challenging environment, as well as with students with low educational results.

Module 3 Activities:

- Recruitment and selection according to an established competence model;
- Training according to a pre-approved program of a higher school for the acquisition of the professional qualification "teacher", in accordance with the requirements of the legal framework in the country within one to two years, depending on the acquired professional qualification;
- Intensive build-up theoretical and practical training before entering school, oriented towards highly effective teaching to meet the individual needs of low-achieving and low socio-economic status students and working in vulnerable communities;
- Assignment to target schools where students are from vulnerable communities and have low results and motivation to learn and/or there is a shortage of specialists from target specialties;
- Building training and supervision by a specialist with experience in practical support of beginning teachers during the school years;

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- Individual support from a teacher-mentor, trained and supported by established programs for the development of effective mentors.”

Used source:

NATIONAL PROGRAM "MOTIVATED TEACHERS"

[https://web.mon.bg/upload/25562/NP14-motivirani-uchiteli\\_100321.pdf](https://web.mon.bg/upload/25562/NP14-motivirani-uchiteli_100321.pdf)

A third innovative approach in the field of providing support for competitiveness in education is the **innovative educational platform Teach Me**. TeachMe is an innovative educational platform aimed at helping teachers and students to develop and improve their knowledge, combining all the possibilities of new technologies. The platform provides teachers with everything they need to teach online easily and with quality and to reach everyone who wants to learn and develop. At TeachMe you can find online training, private lessons and free courses and seminars in various professional fields.

"Teachers in Class" is a training for any teacher who wants to reach the next level in the field of digital education, beyond simply using a camera and a microphone. The training is entirely practically oriented. Many examples and real-life situations typical of the online environment are discussed, which will help learn how to create the most appropriate teaching materials for online lessons, how to engage and hold the attention of students, how to resolve conflict situations. Through concrete steps and tips, one can learn to plan both the entire training and each individual lesson on the teaching subject, adapted to the peculiarities of distance teaching. "Teachers in class" includes 6 classes and is completely free for anyone interested in the teaching profession and the field of teaching.

In the Learning Materials Workshop course, one can gain practical skills in creating quality digital learning content. One can go through the entire process of planning, adapting and developing learning materials, using best practices to create and deliver memorable learning presentations. One can learn to work with Microsoft Power Point, to select the right colors, fonts, animations and transitions. One will learn the ins and outs and hidden tools that will help use the right tool at the right time to create beautiful slides quickly and easily, even if the person has no graphic design experience. The training is extremely practically oriented and within 4 classes one can create fully and qualitatively developed learning materials for a successful class.

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Used source:

TEACH ME educational platform <https://www.teachme.bg/uchiteli-v-chas.html>

## 1. Innovative approaches in Poland

In Poland, recent reforms and the implementation of innovative approaches has led to improvements in the academic performance of Polish students. The country has improved its scores in the subjects of mathematics, reading and science, and remains above the OECD average (OECD, 2015). The education system in Poland also includes comprehensive secondary education from age 16, and low levels of grade repetition.

In addition, Poland has one of the highest levels of attainment of at least upper secondary education among persons aged 25-34 across OECD countries. It also has an above-average level of students in VET programs. Levels of tertiary education of persons aged 25-34 is also above the OECD average and has increased rapidly in the last 20 years. However, the results from the 2013 OECD Survey of Adult Skills shows that literacy and numeracy skills remain below the average for those aged 16-65.

As for the situation for teachers / trainers, lower secondary teachers in the country participate in a pre-service teacher-training program with duration of 5 years and which includes a mandatory teaching practicum (OECD, 2015). However, there are still challenges for educators that remain such as small class sizes, teaching time and below-average salaries. Teachers are also guaranteed special status of their profession, according to the Teachers' Charter. However, a lower-than-average part of teachers think that their job is sufficiently valued in today's society.

At the educational system level, expenditure on education institutions as a percentage of GDP is below the OECD average. However, private expenditure has increased at primary, secondary, postsecondary levels but decreased at the tertiary level (OECD, 2015).

In Poland, there are a number of innovative approaches that have been applied in order to support competitiveness in the field of education. To increase participation in Early Childhood Education and Care (ECEC) and tackle regional disparities in educational access a number of policies and practices have been introduced in the country. For example, early childhood

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education has become compulsory for children aged 5 and above in 2011. Moreover, in 2009, the age of entry to primary education was lowered from 7 to 6 years old. In 2014, primary education at 6 years old became compulsory for those born in the first half of the year. In 2015, however, it became mandatory for all children aged 6 and above. The School Education Act (2013) also limited fees for pre-primary education to alleviate parents.

In the field of VET, a number of reforms and initiatives have also been implemented, such as the curriculum reform (2008), modernization of the national qualifications framework and fostering closer links with employers (OECD, 2015). Two strategies, the Strategy for the Development of Human Capital 2020 (2013) and the Lifelong Learning Perspective (2011) are aimed at linking the education system to labor markets and increasing student mobility. The Improvement of the Governance of School Education project also has the objective to enhance the role of local governments in managing and financing education.

The School Education Act (2013) was amended by the Polish Parliament with the following aims:

- To give the right to all children aged 4 and above to participate in pre-primary education (since 2015) and facilitate access to children aged 3 and above (since 2017);
- To limit the fee paid by parents for each hour of pre-primary education beyond the 5 free compulsory hours to PLN 1 (which amounts to 0,22 EUR).

In addition to this, Free schoolbooks were introduced in 2014 in primary and lower secondary education, beginning from 1<sup>st</sup> grade (OECD, 2015).

To further support competitiveness in the field of education, Poland has introduced approaches to raise the quality of VET. In 2012, the country began implementing reforms of the VET system which aimed at increasing its overall effectiveness. Some of the main changes include:

- A new classification of occupations in VET;
- A re-structuring of the VET curriculum according to learning outcomes;
- The introduction of a new monitoring program to gain information on the implementation of the new curriculum (2014/2015 was announced as the year of VET professionals).

The new program aims at: promoting VET via media communication campaigns to change the attitudes about the field; improving collaboration between employers and the Ministry of  
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Education to increase professional opportunities and adjust provision of skills and competencies to the current demands of the labor market; improving career guidance and counselling for VET students and other ( also through the website <http://www.doradztwo.koweziu.edu.pl/> ).

To better support competitiveness in education, the workforce needs to be well-trained. This is done through the investments in high-quality teaching, improvement of the status of the teaching profession as well as improvement of professional development and growth.

Innovative approaches, policies and practices linked to the achievement of these goals are several. For example, the Core Curriculum of 2008 (introduced since 2009/10) is concerned with learning outcomes, knowledge and skills that need to be gained by each student by the end of a specific education stage (OECD, 2015). The new curriculum shifts from the narrow, subject-related requirements to more general, transversal skills and competences. The new focus of the curriculum is on experimenting, problem-solving, reasoning, collaboration and scientific inquiry. The learning outcomes are important as they guide the examination standards, shifting from knowledge assessment to assessing more general / transversal skills.

This approach also increases school autonomy to create and implement their own programs instead of referring only to those from the list accepted by the MoE. Now, principals have the flexibility to manage instruction time determined for subjects in the curriculum framework. However, they need to make sure that the learning outcomes in the curriculum have been achieved.

The country also invests in ICT and online materials to provide support to trainees and trainers and encourage the application of innovative ICT didactic methods. For instance, through the Digital School program (2012), open educational resources (e-textbooks) were made publicly available, and more free schoolbooks were gradually be introduced. In addition to this, the MoE has implemented a number of projects with the goal to encourage safety and health in schools, such as Fruits and Vegetables in Schools (2014) and the Program of Health Promotion and Prevention of Health Problems of Children and Youth, for which teachers received educational materials.

To share best practices in the field of health promotion, the website Bank of Good Practices (<http://bdp.ibe.edu.pl/> ) was developed. Another Program - A Safe and Friendly School (2014-

2016) also had the goal to promote healthy lifestyles and participation in extra-curricular

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activities. Since then, a Good Practices Data base was developed by the Polish Educational Research Institute to support educators by providing them with information on quality teaching, materials and other instruments.

In terms of supporting competitiveness in education, recent policies and practices in Poland have also focused on increasing the quality of teaching provided by educational organizations through using evaluation results.

In 2009, internal and external school evaluation (Reforma Nadzoru Pedagogicznego) was introduced which aimed at changing institutional culture, encouraging evidence-based decision making and facilitating access to evaluation data via the Internet. The very same year adjustments of external exam to the new curricula were introduced. In 2014, The School Education Information System (System Informacji Oświatowej) was extended to improve system evaluation. This system gathers data from every student, and looks for patterns focused on learning processes, conditions and results.

In addition to this, The Amendment to the Law on School Education (2015) introduced a number of changes to the assessment policies in Polish schools, the most significant being:

- students' promotion to the next grade level does not depend on their behavior at school anymore;
- regarding the external examination after primary school level, it does not have a cross-subject character anymore, but is more focused on the subjects of math, Polish language, and another foreign language.
- regarding the external examination after lower-secondary school level, it is more focused on skills like problem-solving, reasoning transversal skills and other.

Another important aspect and innovative approach for supporting competitiveness in education is the implementation of policies and practices focusing on communication and evaluation. For example, The School of Co-operation project (Szkoła Współpracy, 2013-2015) had the goal to increase the role of students and their parents in decision-making processes in the educational institutions through co-operation with teachers / trainers. An online platform was developed with the objective to disseminate best practices and methods.

On the other hand, The Improvement of the Governance of School Education project (Doskonalenie strategii zarządzania oświatą na poziomie regionalnym i lokalnym, 2010-2012)

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had the objective to increase the role of local governments in management and financing of education. As part of the project novel tools and training were implemented.

There are also several recommendations that were made on how to improve implementation of the reforms. The recommendations were made as a result of the Poland School Inspection Reform (Reforma Nadzoru Pedagogicznego, 2009) which, as mentioned above, significantly amended the school inspection system.

It had a significant influence on the organization of inspectorates and the implementation of innovative approaches in terms of teamwork and evaluation. The Reform gained support from different stakeholders, however some negative aspects in its implementation remain. For example, there was insufficient capacity to implement it and a lack of trust that evaluation can be used for making improvements. The recommendations made are the following (according to Mazurkiewicz, Walczak & Jewdokimow, 2014):

- to promote the goals of the reform to a wider audience and communicate them more clearly;
- to give better guidelines to the implementation of the reform and promote it to gain larger support from stakeholders;
- to extend the scope of decision-making, and facilitate participation of key actors in developing the reform to improve its acceptance;
- to promote the creation of new research tools for school evaluation. To put emphasis on the standardization of tools to guarantee comparability, and build capacity at the local level via the application of the tools;
- to create a new culture of evaluation via a clear strategy for evaluation containing purpose and methods. This can also be done through discussions on the strategy among key actors which will allow for it to be amended, if it is needed. Building trust at the local level and at educational institutions is also important for the use of evaluation results.

Other innovative approaches (still in proposal and planned to be implemented in the 2023/ 2024 school year) which relate to supporting competitiveness in education, include: extending the teaching content related to communication education; supplementing the core curriculum of the Polish language for upper secondary and technical school with educational games; and

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replacing the core curriculum for the subject of Entrepreneurship in secondary schools with a core curriculum for the subject of Business and Management – basic scope and extended scope.

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## 2. Innovative approaches in Cyprus

In Cyprus, recent reforms and innovative approaches have focused on providing better support for competitiveness in education. The vision of the country, which is also in line with its Lifelong Learning Strategy (2021-2027), is to support individuals in meeting their educational needs and objectives.

According to the Department of Education and Science (2000) lifelong learning is defined as the "ongoing, voluntary, and self-motivated pursuit of knowledge for either personal or professional reasons." It is important for a person's competitiveness and employability, and also increases social inclusion, active citizenship, and personal development and well-being.

The Cyprus Strategy for Lifelong Learning (2021-2027) includes innovative practices for the personal development of a skilled, trained and flexible workforce, that has the necessary qualifications to remain competitive and innovative for the European economy, while

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contributing to the promotion of social cohesion and inclusion (Eurydice, 2023). The priority axes of the innovative document National Strategy for Lifelong Learning (2021-2027), are as follows:

- Increasing of the participation of individuals in the field of education and training;
- Improving the skills and competencies of low-skilled individuals;
- Supporting vulnerable groups such as early school leavers, NEETs (persons not in education, employment or training), migrants/refugees and improving their knowledge.

The European and International Affairs, Lifelong Learning and Adult Education Office coordinated actions for the creation of the Cyprus Lifelong Learning Strategy for the period 2021-2027, whilst cooperating with other ministries and bodies, such as Directorates, Services and Departments within the Ministry of Education, Sport and Youth, as well as with different governmental and non-governmental organizations, academic institutions, and many others (Eurydice, 2023).

The Lifelong Learning Strategy (2021 -2027) has the objectives to support national agencies and other bodies to achieve the targets in the field of education. It also focuses on reducing the low participation in lifelong learning (in Cyprus it remains below the average for the European Union). One of the Strategy's main concerns are to increase the efforts to upskill the low-skilled and benefit marginalized groups such as early school leavers, NEETs and migrants.

The following are the strategic horizontal pillars since they have a significant horizontal influence on the measures of the Cyprus Lifelong Learning Strategy (2021-2027):

- Digital transformation;
- Green transition and sustainability;
- Inclusion and equality;
- Validation of non-formal and informal learning;
- Health and well-being;
- Lifelong learning culture.

Four strategic priorities are set as key objectives that need to be accomplished by 2027 in order to develop a knowledge-based and inclusive Cypriot society (Eurydice, 2023):



- Formation of governance, monitoring and evaluation framework that includes policy settings and action plans with clear roles of stakeholders and sound management;
- Upskilling young people through better provision of learning opportunities according to the current demands of the labor market, and the needs for digital and green transition;
- Improving the participation in lifelong learning and the quality of education by providing incentives, removing barriers, and increasing visibility and strengthening of information and communication;
- Improving practice of teachers and supporting educators of all levels of education.

These priorities are established according to national and EU needs, objectives and priorities which results from different programs and initiatives (such as the Erasmus+ programme, the European Pillar of Social Rights, the Digital Education Action Plan 2021-2027, European Education Area, European Skills Agenda, etc.).

The Cyprus Strategy for Lifelong Learning was approved in 2022 by the Council of Ministers and is available at:

[http://archeia.moec.gov.cy/mc/933/lifelong\\_learning\\_strategy\\_2021\\_2027.pdf](http://archeia.moec.gov.cy/mc/933/lifelong_learning_strategy_2021_2027.pdf)

In terms of modernizing education and supporting competitiveness in the field, Cyprus supports prevention schemes for early school leaving (ESL). In the period 2014-2020, the European Social Fund supported the Actions for social and school inclusion (DRA.S.E.) program, which has the aims to decrease ESL levels, improve learning outcomes and deal with delinquency among students. It is a program including various activities, and afterschool lessons in different subjects such as Greek, Math, Economics and other. In addition to this, DRA. S.E offers personal development programs to increase students 'social competencies via theater, arts, sports, dance and music activities. It also provides psychological support to students and parents via the creation and functioning of Centers for information and psychosocial support.

Under the DRA.S. E program, Cyprus has implemented a project to deal with lack of engagement in students and dropout levels in secondary school (<https://www.structuralfunds.org.cy/Drase>). Also, to address the negative impact of the

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financial crisis in education and students, the Program "Actions for social and school inclusion (DRA.SE)" is implemented in the period 2015-2023 in kindergartens, primary schools, secondary schools, high schools, and technical schools. The Program also provides supportive and technological equipment for the educational institutions. At the moment, around 15 000 students benefit from the DRA.S.E. Program, which is almost 15% of the whole student population in Cyprus.

Another innovative approach for strengthening competitiveness in education is Digital Strategy for Cyprus, which was adopted in 2012. It has several important objectives such as inclusion for all (including vulnerable groups) and education and learning. In the last decade, the country has made efforts for improving digital literacy and e-inclusion in youth but not only. Objective 4 (Education and learning) of the Digital Strategy relates to the Ministry of Education's efforts to modernize the education system in Cyprus.

In this respect, the Technology Integration Planning Program also has the objective to increase digital literacy of students and educators and enhance the use of ICT in the education process through:

- Providing educational institutions with modern technology and equipment;
- Modernizing teaching and learning to be in accordance with the current innovative pedagogical methods;
- Training educators to keep up with the recent technological developments / innovations;
- Reforming the curriculum and teaching/learning aids.

The development and implementation of the new curriculum is the main focus of the Educational Reform Program in the recent years. One of the main aspects of this new curriculum is the improvements of skills and competencies such as critical thinking, problem-solving, creative thinking and ICT / digital skills. Furthermore, ICT is ingrained in all subjects in the curriculum in order to improve the learning / teaching process (eSkills in Europe - Cyprus Country Report, 2014).

The integration of ICT in primary and secondary education curricula has been a priority for some time. To support ICT use, the Technology Integration Plan proposes the enrichment of the curriculum and creation of educational materials such as software. In the primary education curriculum, nowadays ICT is not a separate subject, but is a dynamic instrument for learning

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and teaching. The key role of ICT is to ensure a more successful implementation of the curriculum and improvements of competencies such as problem solving, decision making, critical thinking, information analysis, and communication skills.

For secondary school students, an ICT course is taught for two teaching periods per week in each of the three grades of lower secondary school. The aim of the course is to cover the 7 ECDL modules (Concepts of Information Technology; Using the Computer and Managing Files; Word Processing; Spreadsheets; Using Databases; Presentation; Information and Communication.), cover e-Safety, algorithms and programming issues (eSkills in Europe - Cyprus Country Report, 2014).

As regards lifelong learning, the Cyprus Productivity Centre is operating an e-Gnosis web platform in cooperation with Greek partners. The platform provides instruments for self-learning, and free ECDL courses (European Computer Driving License).

*Other innovative approaches to support competitiveness in education (according to eSkills in Europe - Cyprus Country Report, 2014):*

- Implementation of a Learning Management System (LMS): This was implemented in the period 2007-2010 and included the set up of a LMS with digital content and communication tools. Stakeholders: MoEC, the Pedagogical Institute, educators/teachers in educational organizations in Cyprus, the private sector. The aim of the project was to increase educators' and students' digital competencies to make use of ICT in schools.
- Cyprus School Net: Through this project a dynamic educational tool for promoting communication between educators, students and parents was created. The objectives were increasing academic performance, skills and knowledge of students; improving the professional development of educators by providing them with innovative tools; and increasing parents' engagement and participation in the educational life of their kids. The pilot implementation phase included eight primary and secondary schools in Cyprus. The Net has the following characteristics: 1) included learning materials in accordance with the new curriculum; 2) provided email and calendar facilities for students, educators and parents; 3) provided space



for personal webpages for students and educators; 4) synchronous and asynchronous lessons. Stakeholders included schools, the MoEC, and business partners.

- The Design Practice project (2009 - 2011): its goal was to increase educators' lifelong learning skills and to ensure the integration of ICT in teaching through innovative means. The project included trainings with target groups of trainers/educators from Cyprus and Greece. They aimed to prepare educators to use ICT in the classroom, improve their lifelong learning skills through the creation of community of educators for sharing, discussing, debates, implementing various activities, etc. Project results: innovation transfer from the Open University in the United Kingdom) on lifelong learning and preparing educators to use ICT in the classroom, a set of face to face and online teacher training modules (incl. instructional materials, learning environments and instruments and a teacher's handbook); an online portal with a teachers' community and other. At least 500 educators participated in the workshops and trainings and thousands of students were covered in order to improve the quality of education.

*Recent innovative approaches (according to Eurydice, 2023):*

The Ministry of Education promotes new regulations for the assessment of students in secondary schools. In 2023, a new assessment framework was proposed. The MoE also took into account the current educational challenges and problems with student assessment in secondary schools. The framework focuses on multiple forms of assessments for students, the increase in teaching time, encouraging the professional development of educators, the smooth transition from primary to secondary school and other important areas.

In the same year, the MoE announced the restructuring of the current student evaluation system in Secondary General and Secondary Technical and VET. In this respect and with the objective to give pedagogical support to all trainees from middle schools, high schools and technical schools, the MoE plans to implement measures regarding the examination of students (more specifically, reducing the weight of the written exam from 40% to 20% and reducing the examined material to 60% of the taught material). In addition to this, a monitoring mechanism



was also established to supervise grading and control the degree of difficulty of exam essays. This is done to ensure a decrease in stress levels in students associated with their academic performance (Eurydice, 2023). In 2021, the National Plan for Education for the reforms in 2021, 2022 and 2023, was presented by the MoE to the Council of Ministers. To ensure the achievement of the objectives of the Educational Reform (better education quality and learning outcomes), the following measures were implemented by the MoE:

- Increasing the number of teachers in schools (esp. in special education);
- Applying a new evaluation plan for teachers;
- Improved efforts to integrate students with special education needs;
- Improving the learning outcomes through the adopted Reform and innovations;
- Adopting a plan for strengthening and effective inclusion of migrant students;
- Adopting a plan for strengthening and reorganizing Special Education;
- Utilizing digital technology and innovation in all education levels;
- Adopting School and Social Inclusion Actions Program; and other.

The MoE is also exploring options that will limit early school leaving and support better students with learning difficulties, such as developing alternative education programs, promoting VET, etc. The Ministry also proposes to improve integration programs for migrant students, so that they can perform better academically in school. Lastly, the MoE puts together its proposal into the National Education Plan (2021- 2023).

Regarding the integration of migrant children at educational institutions, the policy of Cyprus is the reception of these children and ensuring their smooth adaptation. To achieve this, the basic requirement is learning the Greek language by the migrant students and acquiring socio-cultural training. As regards innovative approaches for supporting competitiveness in education a pilot STEM program was implemented in 8 primary schools in 2021-2022. Its implementation is also planned for secondary schools in the future. The Program promotes an interdisciplinary approach to the learning process (<https://enimerosi.moec.gov.cy/archeia/1/ypp12928a> ).

Thanks to the Program, students are more involved in activities that use knowledge, skills and practices in the field of STEM. By applying STEM methodology, the children complete projects via innovative solutions in the context of the four subjects – science, technology, engineering and mathematics.

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Another recent initiative focused on Internet security. In 2022, Cypriot and Greek students from 300 elementary school classes participated in the online educational activity focused on Internet security – “Athena and Dickie in the Magic World of the Internet”. The initiative was organized by the Cyprus Safer Internet Center – CyberSafety (<https://cybersafety.cy/>), which is coordinated by the Cyprus Pedagogical Institute, the MoE, and the Safe Internet Center of Greece (<https://saferinternet4kids.gr/>). Thanks to the activity, students were informed about the safe use of the Internet in a creative and engaging way – fairy tales. Children from Cyprus and Greece were also presented with the opportunity to communicate remotely in order to strengthen the connection between them and the two Centers.

Last but not least, an innovative approach is the 2022 online program for students focused on mental resilience. The MoE directed the program to gymnasium students who are available to participate in it. The goals are to provide explanations on what mental resilience is, why it is important for students and not only, and how to improve this skill in order to tackle different challenges in life.

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Eurydice (2023). Cyprus - Ongoing reforms and policy developments,  
<https://eurydice.eacea.ec.europa.eu/national-education-systems/cyprus/ongoing-reforms-and-policy-developments>

Actions for social and school inclusion (DRA.S.E.) program,  
<https://www.structuralfunds.org.cy/Drase>

e-SKILLS IN EUROPE. CYPRUS COUNTRY REPORT (2014)

Application of STEM Program in Primary Education schools in Cyprus (school year 2021-2022) <https://enimerosi.moec.gov.cy/archeia/1/ypp12928a>

Website of Cyprus Safer Internet Center – CyberSafety <https://cybersafety.cy>

Website of the Safe Internet Center of Greece <https://saferinternet4kids.gr/>



## **VII. Innovative approaches for providing better support for vocational aptitude in education**

### **1. Innovative approaches in Bulgaria**

The teacher's professional competence includes a rich psychological culture for modern understandings of man. Pedagogical skills as a unit of pedagogical competence do not exist separately from the people who use them. In this sense, the personality of the teacher occupies a special place in his / her professional work. Through the qualities of his / her personality, the teacher not only attracts, infects, but also demands, controls and solves many professional tasks.

Any type of professionalism comes down to acquiring a qualification and mastering a system of personal qualities. It is difficult to practice the teaching profession by a person who does not have the vocation to feel his own activity as a vocation and a duty. This inner feeling also predetermines the necessary structure of professional qualities that affect the overall behavior of students. The success of the pedagogical activity depends not only on the attitude of the teacher towards the children, but also on the attitude of the children towards the teacher. Thus, knowledge, mind, activity of the teacher - everything is subjected to critical analysis by the students. They are one of the most faithful regulators and evaluators of the teacher's personal qualities.

In school there are many difficulties for teachers. They must simultaneously fulfill their professional duties, comply with the requirements of public institutions and at the same time prove to themselves and to society their own capabilities, qualities and skills (Antonova-Angelova & Kareva, 2016).

Source:

Antonova-Angelova, T. and Kareva, I. (2016). PROFESSIONAL COMPETENCE OF THE TEACHER IN THE MODERN CONDITIONS. Third Primary School "Dimitar Blagoev", Shumen, Bulgaria. <https://antonova-angelova.info/wp-content/uploads/2016/09/1.pdf>



### ***Regulatory framework and application in Bulgaria***

The teachers in the composition of pre-school education and school education have a higher education and qualification to perform administrative and pedagogical functions. The professional qualification "teacher" is acquired in higher schools that meet the requirements of the Law on Higher Education, have received program accreditation in a professional direction from the field of higher education "Pedagogical Sciences" or in a professional direction corresponding to a subject or module of school preparation, and the Ordinance on the uniform state requirements for acquiring the professional qualification "teacher".

A teaching position in a subject or module of professional training, for which there is no corresponding professional direction in the Classifier of the areas of higher education and professional directions, can be held by persons without a higher education and without the professional qualification "teacher", if they have acquired the relevant professional qualification under the conditions and in accordance with the Law on Vocational Education and Training.

A teaching position in a subject or module of professional training, as well as specialized training, in a subject Foreign language, with the exception of English, Spanish, Italian, German, Russian and French, can also be held by persons with a completed higher education in the relevant specialty and without the professional qualification "teacher". The position of teacher in sports training in sports schools can also be held by persons with a completed higher education in the relevant specialty and acquired professional qualification "coach" in the relevant type of sport. The persons who occupy a teaching position without the professional qualification "teacher" in the above cases are pedagogical specialists and have the rights and obligations for the relevant teaching position while they occupy it, and the school prepares and implements a plan for the acquisition of pedagogical competences by the relevant person.

The professional qualification "teacher" depending on the acquired competences necessary for exercising the profession, is as follows:

- "children's teacher";
- "primary teacher";
- "teacher ... (subject)";
- "resource teacher".

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The training for acquiring the professional qualification "teacher" is conducted in regular, part-time and remote form with a duration of not less than one year. It includes theoretical and practical training. Theoretical training is carried out through compulsory, optional and optional subjects.

According to Eurydice (2023a), the professional qualification "teacher" can be acquired by:

- persons who are studying for the acquisition of higher education in specialties from professional areas according to the Classifier of areas of higher education and professional areas;
- persons who have acquired a degree of higher education and the relevant professional qualification.

Source:

Eurydice (2023a). Bulgaria bg: Initial qualification for teachers in preschool and school education. Last update: 14 December 2023 <https://eurydice.eacea.ec.europa.eu/bg/national-education-systems/bulgaria/bulgaria-bgnachalna-kvalifikaciya-za-uchiteli-v>

The qualification of pedagogical specialists can be:

- introductory – for adaptation in the educational environment and for methodical and organizational support;
- ongoing - for continuous professional and personal improvement, for career development and successful implementation through periodic updating and supplementing of knowledge, skills and competences.

The mission of the modern teacher is aimed at carrying out a complex of socially significant tasks - to teach, educate and support the personal development of children, adolescents and young people. To prepare European citizens for their social inclusion in society, for their realization on the pan-European labor market in the conditions of competition and free transfer of personnel.

Along with the tendency to bring the training of future teachers in higher schools to uniform European standards and their inclusion to pan-European values, the training of students in pedagogical specialties in individual EU member states is characterized by specific national features for each country. They are in harmony with educational traditions, with generally

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accepted moral values, with the economic condition of the respective country. Developed European countries are working to increase the quality of training of teaching staff in higher schools by implementing the ideas of lifelong learning, permanently improving the qualifications of teachers by including them in continuing qualification courses, one-year specializations, retraining, research teams in scientific projects, workshops, seminars, round tables, scientific forums, teacher exchange programs, mentors during the practical training of students from pedagogical specialties. The realization of the idea of lifelong learning and permanent improvement of the professional qualification of pedagogical staff in Bulgaria is regulated by Ordinance No. 12 (Ordinance 12, 2016) ([http://www.ssubg.info/files/naredba\\_12\\_01.09.2016\\_prof\\_razvitie\\_uchiteli.pdf](http://www.ssubg.info/files/naredba_12_01.09.2016_prof_razvitie_uchiteli.pdf)) and Ordinance No. 15 on the status and professional development of teachers, principals and other pedagogical specialists (Ordinance 15, 2019) ([https://iisda.government.bg/adm\\_services/service\\_regulatory\\_file/94746\\_153971](https://iisda.government.bg/adm_services/service_regulatory_file/94746_153971)). The regulations define the state educational standard for the status and professional development of teachers, principals and other pedagogical specialists in the preschool and school education system in the Republic of Bulgaria. The requirements for occupying positions in the system of preschool and school education, the professional profiles of pedagogical specialists, the conditions and procedures for upgrading the qualifications of teachers, directors and other pedagogical specialists, the acquisition of professional qualification degrees, the formation and presentation of the professional portfolio, are regulated. One of the goals of conducting attestation procedures for pedagogical specialists every 4 years is related to motivating teachers for permanent improvement of their qualifications (implementation of the idea of lifelong learning). Pursuant to Art. 76 (4) item 3 of Regulation 15/2019, the evaluations obtained from the attestation play an important role in directing the pedagogical specialists to increase their qualifications in order to update and supplement or expand their professional competence. When forming the attestation assessment, documents, certificates, materials from the professional portfolio of the relevant pedagogical specialist are taken into account, which prove his professional competence, career development, the successes achieved in working with children and students (Ordinance 15, 2019; Teneva, 2020).

Source:

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Teneva, M. (2020). PROFESSIONAL TRAINING AND CONTINUING QUALIFICATION OF THE TEACHER. TRAKIA UNIVERSITY - STARA ZAGORA. YEARBOOK of the FACULTY of EDUCATION-Volume XVII. DOI: 10.15547/YbFE.2020.01 <https://pf-yb.com/wp-content/uploads/2020/11/1-MTeneva.pdf>

Like many European countries, the labor force in Bulgaria faces a dynamic development influenced by negative demographic trends, seasonal and long-term migration of the population (both in the country and abroad), the imbalance in terms of the economic development of the regions, the opportunities for learning at home and abroad and the dynamic development between economic sectors. This context has a strong impact on the education sector, resulting in an aging workforce and declining student numbers.

The different types of workforce imbalances listed below indicate the need to develop policies that respond to local specificities, as well as to offer specific concerted actions targeting workforce and learning outcomes. The Bulgarian education system faces an unbalanced distribution of teaching skills, driven by student demand, as measured by the teacher-pupil ratio (TPR), where variations are mostly observed among municipalities, and regional differences are rather minor. Below are some of the key observations regarding the workforce:

- The share of teachers with a higher educational-qualification degree is greater in schools with a larger SUU, and this applies to both primary and secondary schools, and to preschool education institutions. In addition, the proportion of teachers with a higher degree of initial education is greater in secondary schools compared to pre-primary, combined and primary schools.
- There is a tendency for teachers with more teaching experience (and at an older age) to be concentrated in schools with a higher SSU, and this applies both to primary and secondary schools, as well as to preschool education. Schools in medium-sized or large municipalities have a higher proportion of teachers with a higher OCS and with PCS and a relatively smaller proportion of older teachers.
- Group eight municipally funded schools have a younger workforce with less teaching experience and a lower OCS.

Opportunities for continuing professional development available to Bulgarian teachers:

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- Formal, regulated
  - In the school or kindergarten - mentoring for newly appointed teachers; participation in methodological associations specifically related to the degree or subject;
  - Outside the school or kindergarten - accredited public providers of credit-granting professional development courses; accredited private providers of credit-granting professional development courses; providers of continuing professional development;
- Informal, unregulated
  - In the school or kindergarten - informal mentoring; self-directed learning;
  - Outside the school or kindergarten - exchange; conferences; non-accredited courses and training programs; inter-school networks and professional learning communities; further formal education.

Over the past decade, Bulgaria has adopted progressive policies aimed at strengthening the qualifications framework and upgrading the profile of the education workforce. While these policies are helping to improve qualifications, many educational organizations still lack the appropriate qualifications. Specific competencies are required such as knowledge, skills and attitudes for: (a) teaching work and performing management functions in the system; (b) guiding professional development; (c) exercising career development; (d) performing a self-assessment; (e) participation in the process of certification of pedagogical specialists (Ordinance No. 15 of 2019).

The Bulgarian system requires and provides a higher educational degree in a certain professional field for school and preschool teacher positions. There are two ways to acquire the necessary minimum qualification for teachers: completion of a bachelor's degree in the field of: (a) a professional pedagogical field that issues a diploma for completed higher education and an educational-qualification degree "teacher", or (b) a specialty in another professional direction, previously indicated as eligible for the position of "teacher", followed by training to acquire the qualification degree "teacher", which requires passing a state exam and the awarding of a professional qualification diploma from a higher educational institution. The legislation allows the occupation of a teaching position by a person who does not have a degree for higher education or educational-qualification degree "teacher" - in this case, the school draws up and implements a plan for the acquisition of pedagogical competences by the person in question

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(Article 213, LPSE - Law on preschool and school education). The requirement for the position of director is to have a master's degree and a minimum of five years of teaching experience. Principals in Bulgaria are obliged to teach and fulfill the teacher quota in accordance with the educational and qualification degree they have acquired. The requirements for the professional profile of teachers and principals cover pedagogical, managerial, social and civic competences. Teachers are expected to have: (a) age-appropriate pedagogical competences, skills to manage different cultures and diversity, and knowledge of the key objectives of the new legislation such as innovation, student-centred approaches, etc.; (b) social and civic competences focusing on teamwork, community relationships and professional development. The competences of the principals are focused on: (a) the process of quality education and strategic management at the level of the educational institution; (b) social and civic competences.

In order to guarantee quality, within the autonomous system of Bulgarian higher education institutions there is an accreditation system that evaluates all bachelor's, master's and doctoral programs in all professional fields - including pedagogy. The introduction of competence-based learning and innovations in teaching requires considering professional standards in three directions: (a) to reinforce competences that are subject to regular updating and lifelong learning, and to continuously develop the necessary competencies for existing positions in the workforce; (b) to ensure the availability of a flexible approach that allows different groups of the workforce, trained under conditions of different educational horizons and related competences focus, to be quickly included in a system of updating and catching up with competences; (c) based on the requirements for the profile and the results achieved in the education of the students (Art. 212, LPSE), to meet the formulated specific priorities for professional development for each teacher and director. With a decree of February 1, 2021, requirements are introduced for higher education institutions that the POU (Initial Teacher Training) programs ensure the acquisition of the competencies for practicing the teaching profession, given as annexes in the Ordinance on the State Requirements for the Acquisition of Professional Teacher Qualifications. With this change in the normative framework, the Ministry of Education and Culture introduces a requirement for a link between the curricula of higher education institutions for vocational education and training and the development of specific competences among teachers. It remains to be seen what results this policy will achieve in terms

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of the methodological and practical training of teachers obtained within the framework of initial training.

### ***Workforce Training Practices:***

There are some key policy decisions related to the programs to consider:

- It is necessary to significantly increase the designated time for practice in educational organizations;
- The time devoted to topics not related to teaching work could be reduced;
- It is necessary to devote more time to pedagogy;
- More opportunities for independent learning of students within the framework of VET programs;
- To introduce innovative teaching methods in VET programs (for example, the approach "teach as you advise others to do");
- Expanding the use of new learning environments in the teaching and learning process in higher education institutions.

In the country, there are many official paths for acquiring a teaching qualification. Policy incentives and available data are formally linked to those pursuing a degree in the professional stream of educational sciences, but there are also pathways to formal qualification outside of this professional stream. The VET policy approach does not distinguish pre-primary teachers from primary school teachers – they are all lumped into the same general category in terms of data and incentives (Review and recommendations regarding workforce policy in the teaching profession in Bulgaria, 2020).

Source:

Review and recommendations regarding workforce policy in the teaching profession in Bulgaria (2020). Project 19BG04 Bulgaria: Roadmap for the development and reform of the policy regarding teachers in Bulgaria. [https://web.mon.bg/upload/28838/BG-19BG04\\_Policy+note\\_301121.pdf](https://web.mon.bg/upload/28838/BG-19BG04_Policy+note_301121.pdf)



### ***Methods according to RAABE Bulgaria:***

- Attended on-site trainings

Suitable form for entire pedagogical teams who prefer to learn in a familiar environment. By choosing on-site training, there is an opportunity for live meetings with trainers - experts with extensive professional and practical experience in conducting training for pedagogical specialists. Together with them, the competences for applying innovative strategies, methods and approaches in education and for building a positive and encouraging development of every child and student educational environment are increased and improved.

- Outsourced training

Participating in learning outside the work environment is not only useful for increasing and improving the professional skills and competences of a teacher, but also provides an opportunity to release stress and accumulated tension, leads to inevitable benefits for pedagogical teams and stimulates creativity and teamwork. RAABE Bulgaria is a licensed provider of tourist services and maintains partner contacts with hotels throughout the country. A team will offer comprehensive logistics tailored to preferences and opportunities.

- Webinars

The advantage of this form of qualification is that you learn remotely in a safe and secure environment, saving time and providing the opportunity to virtually meet and exchange experiences with colleagues from all over the country.

- Distance independent studies

A modern qualification form with the possibility of repeated repetition and working with training materials at the appropriate time and place. With guaranteed long-term access to your chosen course and the freedom to study at your own pace. You will find the developed presentation and video lessons, as well as additional tasks for self-training on the selected topic, in the specially developed distance learning platform of RAABE Bulgaria: [www.raabeonline.com](http://www.raabeonline.com).

- Use of digital resources and technologies in the educational process

Topics from this direction will help to:

- increase digital competence and media literacy;
- use appropriate educational resources for learning in traditional and online environments;

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- successfully integrate modern ICT tools into the educational process;
- create and use digital resources and digital learning content;
  - Innovative teaching and assessment methods and approaches

Topics from this direction will help to:

- apply a competence and interdisciplinary approach in training;
- use innovative teaching and assessment strategies, methods and approaches;
- learn techniques to stimulate students' activity and creative thinking;
- implement interactive forms and methods in the educational process to support the development of the personal potential of children and students;
  - A positive and supportive educational environment

Topics from this direction will help to:

- apply pedagogical strategies to build an educational environment supporting the lasting integration of every child and student;
- implement effective dropout prevention techniques and patterns of interaction with parents;
- support and create conditions for full participation in the educational process of children and students with SEN, learning difficulties, and gifted children;
- recognize and overcome manifestations of aggression, harassment and discrimination in the educational institution;
  - Trainings for pedagogical teams

Topics from this direction will help to:

- increase skills in teamwork, inspirational leadership and conflict management;
- create and maintain constructive professional relationships;
- overcome the signs of professional stress and tension;
- apply effective techniques for communication, inclusion and working with parents;
  - Methodical trainings

Topics from this direction will help to:

- acquire new competencies and upgrade your professional experience;
- apply educational innovations in the study of the direction or subject you teach;
- implement appropriate practical models and techniques for learning and motivation;



- apply appropriate tools for checking and evaluating results achieved and acquired knowledge and skills
  - Organization and management of the institution

The topics in this direction will help management teams to:

- carry out the transformation of the educational institution in the dynamically changing reality;
- apply modern management strategies based on creativity and innovation;
- increase knowledge and skills in quality management and building an effective educational environment;
- plan, manage and control the resources and the various processes in the institution;

The trainings are compiled according to the needs of awareness during the changing conditions and environment of training. The new topics for 2022/2023 are:

- Transformation of the educational institution in the dynamically changing world;
- Digitization in the management of the educational institution through web-based solutions;
- Interactive teaching methods in a hybrid environment;
- Attestation and additional remuneration for work results achieved in an electronic environment;
- Development of the personal potential of children and students through differentiated and personalized training;
- Practical skills for applying a differentiated approach when working in a programming environment Scratch at an initial stage;
- The "exquisite communication" approach in pedagogical practice;
- Early childhood development - identification and support;
- Formation of digital skills in preschool age;
- Effective interaction and cooperation with the parents of the children in the kindergarten in an electronic environment;
- Realization of the competence approach in the education of profiled preparation - 11th and 12th Grade;



- State matriculation exams in Bulgarian language and literature, general educational preparation - challenges and solutions;
- Theater techniques and acting skills in pedagogical practice;
- Prevention of eating disorders and ways to overcome them in a school environment;

Source: <https://www.pedagozi.bg/professional-pedagogicheski-specializacii-i-sleddiplomni-qualificacii>

### ***According to Prepodavame.bg***

*"By teachers for teachers"*

Prepodavame.bg is a site for teachers that gathers in one place useful information for teachers, practical educational resources, developed lessons, video courses and strategies for better teaching. The site is the largest and fastest growing platform for pedagogical specialists in Bulgaria with over 20,000 users.

At prepodavame.bg, every beginner or experienced professional can find adequate information and applicable strategies on a variety of educational topics and subjects. The authors and editors of the site are working professionals with experience as teachers, psychologists and trainers. The site was created by the team of the "Teach for Bulgaria" foundation as a platform for sharing and exchanging good practices by teachers for teachers from all over the country.

The initial idea for the site is part of the FIERST European project (2018 – 2021). Its aim is to spread good practices of inclusive education, created by innovative teachers and educational experts who work with students from vulnerable communities at the local level, to a wider circle of teachers and experts. Teachers exchange experiences and good practices through the platform. Through their website, their ideas reach colleagues across the country.

If you want to share a good practice to implement in the classroom, a strategy that has been tried and fired students to want to learn, a moment of enlightenment, has made you rethink the way a subject or lesson is taught, proposals are accepted in all subjects and for ages 1 to 12. They also accept topics related to key competencies for student and teacher development such as: project-based learning, social-emotional learning, STEM, digital education, bilingual education, teacher development, extracurricular activities, etc.

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By sending an email to [guest@prepodavame.bg](mailto:guest@prepodavame.bg) with the title - "Good practice: [Title of the proposed post]" and including the following information:

- A few sentences that briefly describe the proposed practice and the structure of the post.
- Link or attached photos, videos and other multimedia to be included in the post.
- What audience is the post intended for (eg, high school math teachers, principals, etc.)
- A brief description of the personal role and experience within 80-100 words.
- If there are other published materials, share links.

Available:

- Video courses - Asynchronous video courses that allow upgrading of knowledge and skills;
- Manuals - Detailed manuals on various educational topics with useful tools included;
- Good practices - Collected in one place good practices from Bulgarian classrooms;
- Webinars - Invitations to new useful webinars with inspiring speakers;
- Bilingual - Materials for working with bilingual children and language support;
- SES - Various materials for the development of social-emotional skills;
- Digital Tools - Materials for digital educational tools and software.

For their subscribers, they additionally offer:

Subscription Articles - Practical articles, on any topic, organized by category and subject;

Paid Video Courses - Asynchronous video courses that allow upgrading of knowledge and skills;

Canva Templates - Worksheets, graphics, posters and other useful templates that can be used ready-made or modified;

Intra-school qualification - Prepared topics and trainings to help increase the qualification in the team;

Classroom Worksheets - Ready-to-use materials to engage students;

Archive Webinars - Recording of all free and paid webinars at [Prepodavame.bg](https://prepodavame.bg);

Archive - Weekly Email Newsletter - Every single issue of the weekly newsletter organized by week and topic;

Hidden Facebook Group (Community) - Exclusive content and all new resources are published in the group.

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### *Tips from Prepodavame.bg*

The professional development of teachers is the basis of quality education. Modern realities demand that you forget old clumsy habits and develop new abilities. Here are some easy steps to follow to enhance your professional development.

- Join a professional organization for teachers. Choosing one or more structures will not only enhance your interaction with other education professionals, but will also enable you to stay up-to-date with current news in your field. The following list of such organizations may help you connect with like-minded people: "National Association of Resource Teachers", "Union of Mathematicians in Bulgaria", "Association of Bulgarian Primary Teachers", "Association of History Teachers in Bulgaria", " Association of Bulgarian Physical Education and Sports Teachers" etc.
- Read and share with colleagues articles from scientific methodical journals that relate to the study or subject you teach. You may find useful information in some of the following titles: "i-Continuing Education", "Geographer", "Preschool and School Education", "Pedagogical Novelties", the scientific and methodological magazines of the national publishing house "Az-buki" ("Bulgarian language and literature", "Foreign language training", "History", "Philosophy", "Mathematics and informatics"), etc.
- Visit educational sites to keep up with current news. If you subscribe to the blog of pedovame.bg, you will receive useful and interesting educational materials and you will have access to information about many innovative approaches in education.
- Each month, buy or borrow a book from the educational section and read for 15 to 30 minutes each evening.

Source: <https://prepodavame.bg/>

### ***Professional learning community (PLC)***

A professional learning community (PLC) is not a model or program subject to school leadership. It is a concrete approach to collaborative work between teachers, which aims to create an open environment for teachers to work together to improve the quality of the learning process for students.

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In a PLC, teachers voluntarily participate in regular meetings throughout the school year and discuss the challenges they face. They identify common problems and their vision of what needs to change, forming specific goals or desired outcomes. Through the exchange of good practice, active feedback from classes and general discussions, together they work for better student outcomes and greater teacher confidence.

One of the ideas behind VET is to focus on the main task of formal schooling – to ensure that students learn, not just learn. When this task becomes the mission of the educational organization and all teachers visualize it, the educational organization team naturally begins to ask the questions "How do we know when each student has mastered the knowledge?", "Which educational features and practices have been most successful and helped of students to achieve high levels?". When the teaching team has created a shared vision of learning that includes everyone, even the team itself, then the school as a community takes its first steps towards improvement. (Aleksieva, 2021).

Source:

Aleksieva, R. (2021). What is a professional learning community and how to create it in a school? Zaedno v chas. <https://zaednovchas.bg/profesionalna-ucheshhta-obshtnost/>

***Manual for employees - directors, methodologists and members of educational methodical councils in vocational training centers (2014) of the National Agency for Vocational Education and Training (NAVET)***

The main objective of the Vocational Training Center (VTC) is to help increase the quality and employment of human resources by mastering modern professional knowledge, skills and good practices.

The main tasks of VTC are, by creating conditions for access to continuous wide-ranging professional training and improvement and modernization of professional qualifications, to ensure:

- professional qualification adequate to the current needs of the economy and labor force mobility, in accordance with the European qualification framework for lifelong learning and the European reference framework for quality assurance of vocational education and training;

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- qualification of administrative and management personnel and formation of a motivational system for lifelong learning;
- formation of key competences, as a tool for personal and social development, according to the European reference framework for quality assurance of vocational education and training EQAVET.

The Vocational Training Center provides initial and continuous vocational training for persons who have reached the age of 16 in accordance with Chapter Three of the ZPEO and framework programs under Art. 10, para. 3 and Art. 12 of the Law on vocational education and training (LVET), as follows:

- framework programs A for initial professional training with the acquisition of the first degree of professional qualification;
- framework programs B for initial professional training with the acquisition of a second degree of professional qualification;
- framework programs D for initial professional training with the acquisition of a qualification in a part of a profession;
- framework programs E for continuous professional training for updating or expanding an acquired professional qualification, as well as for acquiring a second or third degree of professional qualification.

Source:

Manual for employees - directors, methodologists and members of educational methodical councils in vocational training centers (2014) of the National Agency for Vocational Education and Training (NAVET)

[https://www.navet.government.bg/bg/media/narychnik\\_za\\_obuchavashti\\_09.01.2015](https://www.navet.government.bg/bg/media/narychnik_za_obuchavashti_09.01.2015)

[FOR WEB.pdf](#)

### ***Book "100+ Inspirational Good Practices"***

In the field of career counseling, it was created under the project "Prometheus" (2014), financed with the support of the Erasmus+ Program (100+ inspiring good practices: E-book. Business Foundation for Education, 2016. URL: [http://prometheus-eu.net/wp/wp-content/uploads/2016/06/eBook113\\_BG.pdf](http://prometheus-eu.net/wp/wp-content/uploads/2016/06/eBook113_BG.pdf)). In essence, it is a virtual library for good

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practices in career counseling and guidance in Bulgaria, Austria, Great Britain, Greece and Italy. A description of the good practices, information on the target group and the type of practice, methodology and application, goals and results, contacts of the authors or their owners are presented. The good practices are arranged alphabetically by the countries where they are successfully implemented and present experiences in offering career services, training products, training activities (seminars, internship programs, etc.), assessment tools, career days, networks, sites etc.

The main target groups are pupils, students, young and older people, working and unemployed people, representatives of vulnerable groups such as people with physical or mental disabilities, from minorities or from marginalized groups, migrants, etc. The innovation collaboration is coordinated by the Business for Education Foundation. The set also offers free access to mobile applications and tools to provide additional resources for career counselors, with the help of which they can provide better services to their clients.

The Prometheus Kit includes 25 innovative career counseling tools. Most of the exercises are suitable for traditional and online counseling, there are also exercises for individual and group counseling: role plays, psychological tests, interview tools, exercises/learning tasks, self-assessment questionnaires and skills assessment tools. Each tool provides information in five main sections: type of tool, objectives, target groups, description and expected results. The Prometheus tools can be used free of charge through the project website in English, Bulgarian, Greek, Italian and German (<http://prometheus-eu.net/>).

Five of the tools can also be used as mobile applications (<https://play.google.com/store/apps/details?id=com.wprometheusapp>). Some of the good practices are highly specific in nature, targeting specific needs, but in general most practices cover a variety of target groups. They present a variety of ways and approaches to providing career services such as: career counseling, career development training, assessment tools, career information, various platforms, online television, internship programs and internships, career days, etc. The metaphor of the name of the project is connected with the meaning of the name of the Greek titan: "prescient, thinking of the future" and corresponds to the goal of career counselors to encourage and inspire hope for better personal and professional fulfillment of



people, especially in the new dimensions of learning and the environment but the new virtual generation.

Source: <https://ec.europa.eu/epale/bg/resource-centre/content/mobilni-aplikacii-instrumenti-za-predostavyane-na-karierni-uslugi-prometey-i>

### ***Mental aptitude***

Psychological problems in the teaching profession are many and most diverse. They are related to the nature and peculiarities of the teacher's work, its structure, professional adaptation, postgraduate improvement.

The goals of the teacher's work are determined by the needs and requirements of society, by changes in education, by social life. Educational tasks are more differentiated and with new content components. The social role of education is growing.

The subject of the teacher's work is the educational process at school, which acquires a wider scope and meaning, is directly connected with the ultimate goal and its content, meets the changing social requirements.

The object of the teacher's work - the child, the student, is complex and difficult, dynamic and variable, both by age and individually. This object also has its qualitative uniqueness, because it also has the functions of a subject. In the pedagogical process, two subjects with their own appearance, functions and capabilities are outlined. This gives a new interpretation to many outlines of the teacher's profession and professional readiness.

An important component of the mental readiness for pedagogical work are the professional-personal qualities of the teacher, significant for the profession, or the prerequisites for their formation. They ensure sustainability of the professional choice, guarantee successful adaptation and success of implementation in the future. This fact makes the psychogram a significant part of the structure of each profession chart.

Source:

[https://www.studentskigrad.eu/index.php?option=com\\_content&view=article&id=1398:2011-07-12-05-37-27&catid=79:2011-03-23-07-42-36&Itemid=112](https://www.studentskigrad.eu/index.php?option=com_content&view=article&id=1398:2011-07-12-05-37-27&catid=79:2011-03-23-07-42-36&Itemid=112)



The personality of a successful teacher is first of all a psychologically healthy person, with proactive behavior and conscious motivation, possessing professional qualities to teach the child knowledge.

Teacher well-being is a positive emotional state that integrates the personal needs and expectations of both students and their teachers. Teacher well-being and job satisfaction strongly influence teacher behavior and are positively related to school and classroom climate and student achievement. Research shows a positive relationship between teacher motivation and student achievement and well-being. In addition, teacher well-being is linked to the retention of highly qualified teachers, which is particularly important for educational organizations serving students with significant needs. Teacher wellbeing and self-discipline also help prevent early school leaving, so it is important that teachers get the support they need. Although recent research on teacher well-being has tended to focus on negative aspects such as stress or burnout, it also illustrates how important this topic is for initial and continuing teacher education. The well-being of teachers cannot be achieved solely through participation in seminars or trainings. Enhancing staff well-being is a long-term process that requires thought, a systematic approach, and the introduction and experimentation of more constructive practices (School Education Gateway, 2021)

Source:

School Education Gateway. (2021). European toolkit for schools.

<https://www.schooleducationgateway.eu/bg/pub/resources/toolkitsforschools/subarea.cfm?sa=601>

### ***EEG-biofeedback (Neurotraining)***

#### *EEG frequency feedback and biofeedback*

This form of biofeedback is called neurofeedback - it is also known as EEG-biofeedback, neurotherapy, neurotraining. The local electrical activity of the brain or its local blood supply are measured non-invasively by sensors attached to the scalp, and information about changes in these indicators is immediately provided to the trainee through an acoustic, visual signal or in the form of a computer game – upon reaching the preset goals, the trainee receives as positive conditioning/reward a greater degree of control in the game. How can this type of biofeedback

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be useful? Neurofeedback is a training system that gives the exerciser the ability to measure and change the metabolic/electrical activity of the brain. The amazing thing about this form of biofeedback is that it gives us feedback (and thus brings to our consciousness) the activity of the neurons inside our heads, which is subconscious activity. Brain waves are associated with the electrical activation and deactivation of neurons. Specific patterns of brain waves that have their corresponding states of consciousness have already been repeatedly studied and identified - for example, alert attention, relaxed attention, deep relaxation, dreaming, deep dreamless sleep, peak performance state, and specific patterns of brain waves have been identified. waves in various disorders – depression, various brain injuries, attention deficit and others. There are many fields of application of neurotraining exercises, some of them with amazing results and without any side effects - attention and concentration training in hyperactivity/attention deficit syndrome, epilepsy, depression, anxiety disorders, post-traumatic stress disorders, chemical and other addictions, suppressed emotional problems, traumas/damages of the brain. Neurotherapy is not a substitute for psychotherapy, but it can accelerate it and go beyond the traditional limitations of verbal therapies - too long a period of therapy, impossibility to easily measure and quantify changes, subjective assessment of changes, uncertainty about the durability of changes, difficult, slow and indirect access to repressed traumatic experiences, controlling mental disorders caused by altered brain physiology through psychoactive medications with potential negative side effects.

To summarize - psychotherapy is a tool for enriching the mind, neurotherapy or neurotraining is a tool for enriching the brain, which requires the cooperation/interest of the trainee and direct work with the brain. Also, the EEG - biofeedback training serves as a mental training for professionals from sports, business, art, the army in their quest to achieve excellence in difficult or difficult conditions.

EEG-biofeedback (Neurotraining) is a scientifically proven method of measuring brain activity (Central Nervous System) and giving the trainee feedback from it in order to change based on learning (Peek, 1995).

Source:

<http://brain-amigo.com/page/77/kakvo-e-biofidbek-i-kakvi-sa-prilozheniyata-na-tozi-metod-.html>

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### *What is neurotraining?*

From 2 to 16 electrodes are attached to the client's head. Additional electrodes are placed on the ears. They are fixed uselessly by using a special paste. The electrodes register a signal (electrical potential from brain activity), which is processed by specialized software. Processed information immediately appears on 2 monitors - for the neurotherapist and the client under two different visualizations. On the therapist's monitor appear graphs showing momentary quantitative and qualitative analyzes of the client's brain activity. Diagnosis provides a basis for choosing a training protocol that the client will deal with. A client at the same time sees their state (how their brain works) as a video visualization.

### *What are video visualizations?*

There is a great variety of video visualizations. In "Car" the trainee sees a car that has to move in the right lane without slowing down and fogging up. In a motivated state, when the brain is awake and working fast, the car will be in the right lane. A therapist will, at the same time, see rapid and correct brain activity. Then their microvolts are normal. If the trainee loses concentration, if they lose interest, the car drifts into the left lane, and the microvolts rise. There are two more conditions in the game, the fulfillment of which indicates that everything is fine - that there is no fog on the monitor and that the car drives fast. If the trainee feels tension, stress or irritation, the fog on the monitor becomes thick. In the absence of voltage, a wonderful mountain landscape is visible on the monitor. When they manage to keep their attention, the car begins to move rapidly forward. This or another game is simply a reflection of what happens at the level of biochemical reactions and conduction in our brain. This enables the exerciser to train their central nervous system to function properly.

After a minimum of 15 trainings (each session lasts about 60 minutes), the trainee learns to regulate the microvolts of the various brain networks by themselves. The result is permanent because a conditioned reflex is triggered. Prolonged stimulation to voluntarily maintain a certain electrical voltage in our respective electrical network leads to the establishment of a permanent voltage in it.

### *For absolutely healthy people*

Above all, for those who feel the need to constantly improve - managers, heads of large companies, doctors, athletes, lawyers, drivers and others. In general, people living under great

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pressure, who have to make quick and accurate decisions, to be fully alert and focused at all times. And also, for people who want to reduce their tension, control their emotions, live healthier and more fully. It is used for the burnout effect.

With the help of neurotherapy, immunity improves significantly, people start to better control our emotions, achieve better results in their professional and personal life, and also in sports. After 15 sessions of EEG biofeedback, a person really feels more cheerful and happier. This method is like fitness for the brain! Like a modern massage of the brain! Just as the body feels better if we exercise regularly, so our brain would feel better if we "exercise" it using EEG biofeedback.

Source:

<https://adea-bg.com/%D1%83%D1%81%D0%BB%D1%83%D0%B3%D0%B8/%D0%B1%D0%B8%D0%BE%D1%84%D0%B8%D0%B9%D0%B4%D0%B1%D0%B5%D0%BA/%D0%B5%D0%B5%D0%B3-%D0%B1%D0%B8%D0%BE%D1%84%D0%B8%D0%B9%D0%B4%D0%B1%D0%B5%D0%BA-%D0%BD%D0%B5%D0%B2%D1%80%D0%BE%D1%82%D1%80%D0%B5%D0%BD%D0%B8%D0%BD%D0%B3/>

Through neurotraining therapies, the sense of self is created/enhanced and trained to achieve:

- equilibrium, balance, efficiency;
- motivation, resilience, will;
- concentration, stability;
- patience, confidence, mobilization;
- success, peace of mind;
- happiness;
- creativity, security;
- increased memorization, determination;
- accelerated learning and perception of information; excellence;
- feeling of energy and fitness;
- a sense of groundedness and calmness;

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- improved interpersonal relations;
- balancing the cycles of wakefulness and sleep;
- directed thinking and changing behavior patterns;
- reproduction of information;
- self-control over the emotional state;
- mastering a brain state called "unstressed alertness";
- presence of deep mental and physical relaxation, comfort;

Neurotraining gives good results when there are no organic changes in people with mild depression, with various new phobias and panics. It also has a good effect on bulimia and anorexia and addictions such as alcoholism and drug addiction as an accompanying method. Neurotraining is most often replaced by EEG biofeedback therapy in the presence of organic changes as a complementary method in rehabilitation after strokes or brain injuries.

Biofeedback therapy is recommended for:

- dependencies;
- chronic headache;
- depression;
- apathy;
- stroke;
- dyslexia, dysgraphia, dyscalculia;
- epilepsy;
- concern;
- hyperactivity;
- impulsiveness;
- difficulty falling asleep;
- anxiety;
- autism;
- irritability;
- short temper;
- ADHD;





- non-stop internal conversation;
- brain injuries;
- social fears;
- stuttering, speech problems;
- tics;
- chronic fatigue;
- neurological disorders;
- bulimia or anorexia;
- phobias, fears, sadness;
- chemotherapy;
- Parkinson's disease;
- post-traumatic stress;
- emotional disturbances;
- problem memory;
- aggressive behavior;
- problems at school;
- the sense of being lost;
- restless legs or arm syndrome;
- early awakening;
- stage fright;
- sorrow from loss or separation from a loved one;
- post-traumatic stress;
- cerebral palsy;
- isolation;
- postoperative conditions;
- hearing or vision impairments;
- headaches of different origin;
- Hypertension, Schizophrenia;
- Obsessive-compulsive disorder;



- Hyperactivity, attention deficit and many others.

Source:

<http://neurotrening.com/%d0%bd%d0%b5%d0%b2%d1%80%d0%be%d1%82%d1%80%d0%b5%d0%bd%d0%b8% d0%bd%d0%b3/>

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## 2. Innovative approaches in Poland

Since the end of the communist regime in Poland in 1989, the education system in the country has undergone significant changes in important aspects such as structure, organization, management and the core curriculum (Eurydice, 2023b). As a result of those impactful changes, the Polish education system has some specific characteristics such as:

- a combination of centralized governance and decentralized school administration;
- a system of external examinations, conducted at the end of compulsory education and on completion of general and vocational secondary schools. The examinations have an impact on the educational / vocational path of the student and are prepared and assessed by external evaluators. The examinations after compulsory education are mandatory for all students, whilst the secondary examination is only for those students who wish to continue their education path at the tertiary level, or gain a vocational qualification.
- a specific definition of teachers' status. The teacher's profession is regulated by the Teacher's Charter – a document which includes rules of admission, duties /responsibilities, remuneration, dismissal, and the career path of the educators.
- A dominance of public education over private education (the number of students in public schools is much larger than the number of students in non-public such). This also applies to higher education.

In addition to this, in the last 6 years (2017 – 2023), the Polish educational system has changed significantly. The new school structure which was established includes:

- 8 years of primary school;
- 4 years of general secondary school;
- 5 years of technical secondary school;
- 3 years of Stage I sectoral vocational school;
- 2 years of Stage II sectoral vocational school;



- 3 years of special school preparing for employment and post-secondary school (source: Eurydice, 2023b).

This restructuring was based on Act 14 (December, 2016) “Law on School Education” and an act - “Legislation introducing the Act – Law on School Education”.

As regards the teachers themselves, according to OECD, Polish teachers are younger compared to teachers from other OECD countries, and there is a larger proportion of female teachers (74%, compared to the OECD average of 67%). Admission to teacher training programs is on the basis of results from the upper secondary final exam.

Pre-primary and primary teachers need to have at least a bachelor’s degree, and to have undertaken a mandatory teaching practicum. Secondary teachers must have a master’s degree. Career stages such as “appointed teacher” and “chartered teacher” are related to better professional development and an increase in remuneration.

Teachers can be employed as career civil servants or as employees on a contract. As mentioned above, their special status is defined in the Teacher’s Charter (Karta nauczyciela). 94% of Polish teachers participate in professional development compared to an average of 88% in other OECD countries (according to TALIS, 2013). However, some teachers from Poland express the need for greater professional development, especially lower secondary teachers teaching students with special educational needs (SEN), and those in need of improving their digital competencies.

In addition to this, teaching conditions are in need of improvement – currently salaries and class sizes are lower compared to in other OECD countries, as well as teacher-student ratios and teaching time at primary and secondary schools. Lower secondary teachers earn 86% and upper secondary teachers earn 84% of the salary of similarly highly educated workers (compared to the OECD average of 86% for lower secondary teachers and 91% for upper secondary teachers; OECD, 2015). Nevertheless, conditions continue to improve for teachers in Poland.

The European Semester Country Report (2015) identified another challenge for education in Poland: the need to improve training of teachers to enable them to teach competences and skills necessary for the needs of the modern labour market. Additionally, VET does not yet seem aligned to current labour market demands. In 2012/2013 Poland began implementing reforms of its VET system but there are still issues to be solved, particularly in the cooperation between

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small and medium enterprises and VET schools for developing work-based learning and increasing the competencies of educators in VET (OECD, 2015).

To provide further support for better vocational aptitude in education, Poland has adopted a number of important policy documents on the development of VET in the country. The school year 2014–2015 was also titled the ‘Year of Vocational Schools’. The VET sector was relatively neglected up until recent years, but now can definitely adjust to the current demands of the modern labor market (both in Poland, and in the European Union).

Since 1989 (the year of the fall of the communist regime) the VET system has been in decline – a decreasing number of VET schools, trainees and trainers, and decreasing reputation / status of those educational institutions. At the present time, there are 1700 basic VET schools, 1900 special upper secondary schools (called lyceums) and 2200 post-secondary schools in the country. This is a significant decrease compared to in 1989 when there were 8000 VET schools. In addition to this, the decrease in students graduating from VET schools has created serious gaps in the human resources in the modern labor market. This is further exacerbated by the rise in emigration levels of persons with vocational qualifications. According to the Central Statistical Office (CSO), around 2,2 million Polish individuals live abroad and the larger part of them are labor workers.

Another challenge is that levels of unemployment are significantly higher for people with VET education than those of persons with a higher level of education. According to Eurostat, in 2014 the unemployment rates for the former were around 9,5%, whilst for the latter, they were only 4,3%. Therefore, the data indicates that, although technical skills are in high demand for the modern labor market, persons with VET education struggle to find a job. This means that there is an issue in the adaptation of VET systems to the labor market conditions (Owczarek, 2015). However, in recent years things have been changing for the better and a number of public policy initiatives and a number of innovative approaches and reforms were adopted.

For example, in 2014, the Agreement on Cooperation for Vocational Education Development was signed. It states that the parties (representatives of four employer organisations involved in social dialogue within the Tripartite Commission for Social and Economic Affairs and the Chair of the Tripartite Commission, Władysław Kosiniak-Kamysz, Minister of Labour and Social Policy, Joanna Kluzik-Rostkowska, Minister of National Education, and other parties) are

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willing to work for supporting consistency of the direction and structure of education, increasing the relevant skills and therefore increasing the mobility of workers. The cooperation also includes legislative solutions and developing a model of vocational education which is in line with the demands of the modern labor market. In addition, a Task Force affiliated to the Minister of National Education was envisioned (Owczarek, 2015).

In 2015, an Inter-Departmental Agreement on Cooperation for the Development of Vocational Education was signed by representatives of several Ministries: the Ministry of Economy, the Ministry of National Education, the Ministry of Labour and Social Policy, and the Ministry of State Treasury. It had the following important objectives:

- to ensure effective actions for the development of the VET sector, according to the needs of employers, the demands of the labor market and the economy;
- to promote the cooperation between educational institutions (such as schools) and employers in VET and to increase the involvement of employers in vocational training.

This cooperation also includes:

- encouraging VET schools to adjust the offered by them vocational education to the demands of the modern labor market and the state of the economy;
- encouraging employers' better involvement in the VET process at VET schools. This is done through the following measures: the preparation of a core curricula for the different occupations, the preparation of cuticulum documentation in cooperation with educational institutions; the accepting of trainees for practical vocational training; participating in exams confirming occupation qualifications; supporting trainees of VET schools in the gaining of skills necessary for the workplace, and other.

Another innovative approach is the “Year of Vocational Schools” declared by the Ministry of Education in the year 2014-2015 which focused on increasing the quality of vocational education (Owczarek, 2015). Career counselors in lower secondary schools were trained under project “Education for Work – Phase II”. The training included 18 000 **teachers** and school directors. As a direct result of the project, Guidelines titled “Educational and vocational guidance: sample solutions” were published and sent to schools for supporting the dissemination of good practices in the field.



In addition to this, The Strategy for the Development of Human Capital 2020 (Strategia Rozwoju Kapitału Ludzkiego 2020, 2013) focuses on the improvement of the quality of higher education in order to align what education currently offers to the modern demands of the labor market.

To further support vocational aptitude in education, Poland continues to invest in high-quality teaching, improving the status of the profession and the professional development of educators themselves.

Recent approaches include investing in information and communication technology (ICT) infrastructure, online teacher and student support materials for all Polish students and teachers to promote the use of innovative didactic methods supported by ICT. Under the Digital School programme (2012), open educational resources (e-textbooks) were made publicly available, and more free schoolbooks were gradually introduced. Additionally, as a result of a project conducted by the Polish Educational Research Institute (PERI), a Good Practices Data Base has been created to support teachers and school managers with information on high quality teaching, assessment materials and other instruments.

*More recent innovative approaches for providing better support for vocational aptitude in education (according to Eurydice, 2023c):*

#### **Digital school of the future - launch of consultation on the [edukacja.gov.pl](http://www.edukacja.gov.pl) portal (2022)**

The Portal provides services and educational tools and was developed to support members of the educational community in their studies and work. Thanks to the [www.edukacja.gov.pl](http://www.edukacja.gov.pl) website, different educational documents can be gathered in a single account, and can be shared. Educational organizations also benefit from the digitalization of processes. All members of the education community - pupils, students, parents, teachers, tutors, school leaders can participate and be involved. The consultations provided take place in two stages.

There is a special form on the [www.edukacja.gov.pl](http://www.edukacja.gov.pl) website, that allows the user to submit proposals for the portal's functionality and expectations. Completing the form takes only a couple of minutes. If there are any doubts regarding the proposals, the portal team can contact the submitters of the proposals. The portal team also conducts interviews to reflect expectations of users of the website. The consultation does not have a deadline, but proposals made earlier are taken into account faster (Eurydice, 2023c).

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Furthermore, in 2022, the Polish Parliament passed an amendment to the Teacher's Charter Act, according to which the number of professional promotion grades for teachers will be reduced, and salaries will be higher. Two levels of professional advancement will be removed: trainee teacher and contract teacher. This leaves four degrees of professional advancement – novice teacher (without a professional promotion degree), appointed teacher and chartered teacher. Changes are also made regarding teachers' remuneration - the average remuneration of a teacher without a professional promotion rank is to be 120 % of the base amount for teachers annually in the Budget Act.

At the present moment, the average remuneration for teachers is 100 % of the basic amount for a trainee teacher and 111 % of the basic amount for a contract teacher. The average remuneration for appointed and chartered teachers will not be changed - 144 % of the base amount determined for an appointed teacher and 184 % of the base amount determined for a chartered teacher. In addition to this, according to the Amendment, teachers will be required to be at school for 1 hour per week (for a 40-hour week), during which they will provide consultation for students and/or their parents (Eurydice, 2023c).

In addition to this, in 2022 (to support the vocational aptitude in education) the Key aims for the state educational policy for 2022/2023 were updated. One of the aspects focuses specifically on the improvement of teachers' competences for working with students coming from other countries (specifically Ukraine), to better address their needs. Furthermore, a priority is the improvement of the VET system in cooperation with employers and the effective implementation of the Integrated Skills Strategy 2030.

Other important aspects are the development of teachers' methodological skills and competencies for using ICT in educational processes, as well as supporting teachers and other members of the school community in developing students' basic and transversal skills (specifically by using the teaching aids provided under the "Laboratories of the Future" program). Transversal skills are those typically considered as not specifically related to a particular job, task, academic discipline or area of knowledge but as skills that can be used in a wide variety of situations and work settings (IBE, 2013). Examples include critical thinking, interpersonal skills (such as communication skills, organizational skills, teamwork, etc.), intra-



personal skills (such as self-discipline, self-motivation, perseverance, etc.), global citizenship skills (such as tolerance, openness, respect for diversity, etc.) and other (UNESCO, 2014).

In general, the amendment to the State Educational Policy aims at improving education quality. Another innovative approach from 2023 is the “Active Whiteboard” program which aims at developing school infrastructure and increasing the skills of students and teachers in the sphere of ICT. Financial support is provided to: primary and secondary schools, schools educating blind pupils, schools educating students with special educational needs (including those with different disabilities), special education centers and others. The Program is both aimed at public and non-public schools. Link: <https://www.gov.pl/web/edukacja-i-nauka/aktywna-tablica-edycja-2023>

In conclusion, the abovementioned innovative approaches and recent reforms adopted in Poland contribute to supporting the vocational aptitude in education in the country. The VET sector is receiving significantly more attention compared to 20 years ago, and has the opportunity to flourish. A number of policy initiatives were adopted to make education more flexible, and reflect better the current demands of the modern labor market and the state of the economy. However, only after a few more years, can the positive impact of the adopted measures be fully assessed.

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### 3. Innovative approaches in Cyprus

In Cyprus, all school teachers are obligated to have at least a Bachelor’s degree, whilst university teachers are obligated to have a PhD. Educators at public universities are not civil servants. The decision-making bodies for the service conditions of academic staff are the Council, the Senate and the Faculties and Departments (Eurydice, 2023d).

The state is responsible for the continuous education of school teachers with and the Pedagogical Institute of Cyprus offers compulsory and optional courses. At the higher education level, continuing education for educators is not regulated.

Teachers should take the following principles into account when organizing the teaching of the curriculum subjects:

- They should consider the school to be an environment in which all students are accepted as they are, with their own capabilities / skills and weaknesses / areas in need of improvement, and are treated as individual persons with particular needs and talents, which must be met;
- They should create a positive, friendly and encouraging school environment, which offers each student the opportunity to succeed academically;
- They should promote, as much as possible, an interdisciplinary approach in order to provide consistency in education;
- They should consider their students’ abilities / skills / talents in defining lesson objectives (Eurydice, 2023d).

*Conditions for teachers working in school education in Cyprus:*

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Teachers at all school levels in Cyprus are career civil servants. After the two-year probationary period is successfully completed by the teacher, they become permanent staff members and do not have a contract as such. Here are the variety of ranks in a teacher's career (Eurydice, 2023d):

- Education officer;
- Inspector;
- Headteacher;
- Deputy headteacher A' (only for secondary level education);
- Deputy headteacher;
- School teacher.

It should be mentioned that there are also teachers who are employed on a short-term contract basis to cover immediate needs.

For all teachers at pre-primary, primary and secondary levels, the code of conduct (duties, responsibilities, and discipline) is included in the *Public Education Service Laws of 1969 (Law N.10/1969)*.

*Support measures:*

Support measures are primarily focused on novice teachers. There is no particular individual who is responsible for dealing with difficult situations regarding teaching that an educator may face during their career. Instead, the problem is dealt with within the educational institution by the deputy headteacher or the headteacher. If additional support is needed, the teacher can consult the Inspector or other experts from the Ministry of Education and Culture.

As regards support measures for new teachers, the current practice is that they are assigned a more experienced teacher who can provide them with guidance, support and advice as a mentor. An induction program is also conducted by the Cyprus Pedagogical Institute (CPI), which aims to support the smooth induction of new teachers through a mentoring system (Eurydice, 2023d).

*To better support vocational aptitude in education, a number of national reforms and measures have been adopted in Cyprus:*

- a) In January 2022, a meeting was held in which the Minister of Education, Culture, Sports and Youth discussed with representatives of Cyprus Chamber of Commerce and Industry, Organization of employers and industrialists, Organization of Greek Secondary Education Officials of Cyprus and the Human Resource Development Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.

Authority, the secondary education study programs and the developments in relation to the contemporary demands and employment conditions in the modern labor market, as well as *vocational guidance needs in education*. The meeting conducted focused on the necessary changes in the organization of curricula in Lyceums and Technical Schools including internships during studies and development of the Post-Secondary Institutes of Vocational Education and Training, with emphasis on the development of skills (including digital skills) that are necessary in today's world and in line with future trends of development (Eurydice, 2023d).

b) *ANAD (Human Resource Development Authority) Strategic Plan for 2023-2025*

The Strategic Plan for 2023-2025 has already been created. The process of strategic planning includes the determination of the organization's mission, vision, values and strategic goals, through the analysis of the external and internal environment. The strategic goals for the period 2023-2025 are as follows:

- To upgrade the human potential of Cyprus with the continuous and lifelong learning of the employed and the unemployed with an emphasis on youth, the elderly, the low-skilled and the long-term unemployed persons;
- To increase productivity and strengthen competitiveness through improving adaptability and better utilization of human resources (HR);
- To improve quality assurance and effectiveness of the human resources (HR) training and development system, through the assessment and certification of the training provided, the strengthening of the control systems and procedures, as well as the knowledge, skills and professional qualifications of the local human resources (Eurydice, 2023d).

c) *Digital upgrade path for sustainable assessment in education*

During the COVID-19 pandemic, 95% of education institutions were affected and educational institutions from all over the world (incl. Cyprus) shifted teaching and learning to a distance environment in order to meet the challenges posed by the COVID-19 pandemic. This situation had a significant negative impact on both students and teachers.

The DigitalHElights was a project funded under the Erasmus+ program and undertaken by the Technological University of Cyprus (TEPAK), with the aim to promote a sustainable path for  
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the transformation of evaluation into higher education by developing digital readiness, resilience and competence and supporting digital skills for vocational aptitude, using the DigComp Edu Framework for Higher Education.

More specifically, this project aimed to support the digital upgrading of faculty members (such as teachers, tutors, trainers, and others) in the field of digital evaluation and the development of integrated training material in the field of digital evaluation that will support academic members and researchers. The intention was to enhance teachers' skills in assessment through digital media.

*d) A Teacher Professional Development Program in Cyprus - Augmented Reality in Lower Secondary Education (Lasica et al., 2020)*

This is an innovative approach for supporting vocational aptitude which presents a Teacher Professional Development (TPD) program which was designed, pilot tested, and implemented to examine the impact of augmented reality (AR) on a number of characteristics such as: teachers' level of technology acceptance, adoption of inquiry-based instructional approaches, and confidence towards teaching contemporary skills (i.e., critical thinking, inquiry, creativity, problem-solving, collaboration, etc.) in STEM (science, technology, engineering, mathematics)-related courses; and students' improvement of specific skills, motivation and interest during a STEM-related course supported with AR.

The TPD program was implemented in two countries - Cyprus and Greece with 25 lower secondary school teachers (20 in Cyprus and 5 in Greece). The methodology applied was Educational Design Research (EDR), including an initial phase of the TPD program and a second (adapted) phase. The data collection tools included online questionnaires, interviews, and observation of classroom interventions (Lasica et al., 2020).

A particular aspect that is being explored is the potential of integrating the augmented reality technology (AR) and mixed reality (MR) in the Immersive Learning Landscape. Teachers/ tutors/ trainers/ educators are the key persons in the processes of designing and developing educational activities and materials towards this Immersive Learning landscape to exploit the potential of augmented reality (AR)—therefore, they could provide the necessary instructional support to their students, maximizing the positive impact of such technologies (Lasica et al., 2020).

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In addition to this, teachers' encouragement to recognize the added value that AR could have on teaching, learning, and assessment, as well as having knowledge about the innovative practices and instructional tools, is of major importance.

The abovementioned Teacher Professional Development (TPD) program was developed within the context of the EU project Enlivened Laboratories within STEM Education, which has the goal to inform teachers about the potential of AR technology for improving the teaching and learning processes in lower secondary education.

The TPD program was designed, pilot tested and implemented to explore the positive impact of augmented reality (AR) on: teachers' level of technology acceptance, adoption of inquiry-based instructional approaches, and confidence towards teaching contemporary skills in STEM-related courses; and the students' improvement of specific skills, motivation and interest during a STEM-related course supported with AR (Lasica et al., 2020).

The core target group of this innovative approach for supporting vocational aptitude in education includes Lower Secondary Education teachers. The TPD program has been applied twice:

- (1) An initial phase in Cyprus for Lower Secondary Education teachers of STEM-related courses and;
- (2) a second adapted phase, both in Cyprus and Greece, in the context of specific schools, based on the Technological Pedagogical and Content Knowledge (TPCK) approach (Mishra & Koehler, 2006).

The total number of participating teachers is 25, while six of them applied AR in their STEM-related courses after.

In addition to the teachers, students participating in the implementations of STEM-related courses supported by the technology of AR, were also a target group. The implementations took place with students aged 12 - 15, which were in Grades 1–3 of lower secondary education (in Cyprus: Gymnasium). The focus was on three classes of twenty students (sixty students in total) that participated in the interventions implemented by the teachers.

The TPD program specifically focused on how to effectively implement inquiry-based instruction within the school curricula through the functional integration of AR with existing core curricular ideas. The theoretical framework underpinning the TPD program is based on

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Problem-Based Learning, Inquiry-Based and Contemporary Learning Approach, promoting scaffolding and collaboration in education (Lasica et al., 2020). In addition to this, Technological Pedagogical and Content Knowledge (TPCK) has been applied as a research framework for supporting teachers' professional development in the use of ICT in education (Lasica et al., 2020).

The goals of the TPD program were the utilization by teachers of existing AR Learning Objects in their classrooms, and the development of their own AR Los and Lesson Plans with appropriate tools and applications (Mavrotheris et al., 2018).

These goals were achieved through the development of a supportive culture, which motivated teachers to integrate AR with core STEM curricular ideas and to transform their classrooms into a smart-learning environment (Lasica et al., 2020). A blended approach was implemented, including both face-to-face training workshops to encourage communication, and develop a personal connection, as well as a project online course, to offer teachers time flexibility and ease of access to additional content (articles, videos, and others).

*General description of the TPD program:*

In 2019, 20 teachers completed the TPD program to gain knowledge and competences to engage their students in problem solving, inquiry-based activities and innovative technologies, such as AR, aiming to increase their interest in STEM and promote the gaining of important skills (Lasica et al., 2020). Several teachers applied AR into their classrooms, while two of them were from a public school in Cyprus.

After the initial phase ended, the TPD program was repeated with five teachers of a private school from Greece. 25 teachers / trainers completed the program overall, twenty in Cyprus and five in Greece.

During the conducting of the meetings, teachers were given numerous opportunities for interactive and collaborative learning through the application of modern technologies and equipment (i.e., smartphones, tablets, cardboards and others) and to get engaged in collaborative educational activities. They also learned more about various tools, instruments and applications for developing AR Los within STEM-related courses (Lytridis, Tsinakos, & Kazanidis, I., 2018).





The strategies which were applied in the duration of the TPD program, included open-ended investigations, AR visualizations, collaboration and reflection on ideas and experiences, providing a learning environment that improved teachers' understanding of STEM, AR supported education, and interdisciplinarity. Furthermore, the learning environment served as a model to teachers for the types of learning situations, technologies and curricula they could implement in the classroom (Meletiou-Mavrotheris & Meletiou-Mavrotheris, E., 2007).

The final part of the TPD programs in Cyprus and Greece included guided field practice. Teachers / trainers expanded upon the digital instruments and the instructional material, and applied them in practice in the classrooms, through design and implementation of Lesson Plans and AR Learning Objects. These AR were with the purpose to become an important part of the main curricula and also to consist of reusable educational material for other teachers / trainers to use in the future. A total of six teachers integrated AR in their courses (two from Cyprus and four from Greece).

In conclusion, the abovementioned innovative approaches adopted in Cyprus contributed to supporting the vocational aptitude in education in the country. As vocational aptitude is defined in the Psychology Dictionary as “the individual skills and characteristics needed for excellent performance of the jobs comprised in a specific profession” (in this case the profession of the teacher), the described approaches focused on improving the skills (incl. digital) and competencies of educators that are necessary for their better work performance at educational institutions.

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## VIII. Strategic planning of HR

### 1. What is an HR strategy?

Strategic Human Resource Management (HRM) is an approach to organizational decision-making that affects people—the core components of an organization's business strategy. It refers to the relationship between HRM and the strategic management of the organization. Strategic human resource management refers to the overall direction an organization wants to take in achieving its goals through people. It is argued that since people are ultimately the ones who implement the strategic plan, top management should take this key factor into account when developing corporate strategies. Strategic human resource management is an integral part of these strategies. It is further argued that a firm's strategic capability – the achievement of sustainable competitive advantage – depends on its ability to provide resources, and people unequivocally constitute the primary resource. Strategic human resource management is seen as an approach to dealing with long-term human resource problems, as part of the task of strategic business management. It covers macro-organizational issues related to structure and culture, organizational effectiveness and performance, matching resources to future business requirements, and managing change. In general, human resource management addresses all major people-related issues that affect or are affected by the organization's strategic plans and provides an "agenda" for change, setting the intentions for how these issues will be addressed. Wright and Snell believe that in business, strategic human resource management is concerned with "those personnel management activities that are used to support a firm's competitive strategy". Another business-oriented definition is proposed by Miller: Strategic human resource management covers those decisions and actions that affect the management of employees at all levels of the business and that are aimed at creating and maintaining a competitive advantage. Walker defines strategic human resource management as "a means of 'aligning' human resource management with the strategic content of the business", and Boxell expresses the view that "the critical interests of human resource management are integrated into the strategic management of any business". Human resources are the people in the organization with their skills and personal qualities that make it possible for it to achieve its business goals. Companies with foreign participation differ from other economic organizations mainly in terms of the resources

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they use for the purposes of their activity. The human resources employed in the individual branches make it possible to transform its resources (raw, material and anthropogenic) into specific products and services that find realization on the domestic and foreign markets. There are different perceptions about the nature of human resource management. Some of the authors believe that they are valid for the general positions of management, others give their preferences to the components of human resources management, and still others to the principles on which it is implemented. Usually, the essence is also sought by juxtaposition with personnel management. Human resource management is a system of activities for the fulfillment of company goals through the effective provision of various types of labor resources. It is identified with recruitment, retention, movement, training, evaluation and promotion, release and effective utilization of personnel. According to D. Shopov and M. Atanasova: "Personnel management is identified with the manager's activities of assigning tasks to his subordinates and organizing their individual or group activities, using not administrative command methods, but motivational techniques". According to M. Atanasova: "Personnel management is a complex and dynamic activity that requires good theoretical and practical training and professional qualification from the manager. It is treated as a strategic activity that subordinates people management to the organization's business strategy. They must know not only people in the work process, but also have knowledge of all other types of management, because human resource management includes: motivation, communications, leadership, group management and conflict resolution".

Although the activities of companies with international participation are very diverse, the following basic requirements stand out in the management of human resources: Knowledge of state regulations, the Labor Code, legal provisions, decrees and decisions of the government and the relevant ministry. Creation of rules and regulations for the activity of each object and activity based on the experience of the large and global chains and the Bulgarian experience. Preparation of job descriptions for each worker. Rights, responsibility and control. Incentives and sanctions. Direct work with people. Workers and employees should know their rights and responsibilities. Workers meet with their supervisors to review work and accept new assignments at least once a month. The activity of the staff is exclusively aimed at providing high-quality services to customers. An essential point in management is the existence of a

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specialized unit with a manager - a manager (director), who is responsible for recruiting (hiring) employees (including those on temporary jobs), for the development of personnel. A personnel management program is also developed, which includes: job analysis - usually a job description; work standards – quantitative and qualitative dimensions for each activity; recruitment and selection of existing and new workers; acceptance of applicants' documents, interview and appointment; training as a periodic process - planning a training policy, planning training needs, conducting training, evaluations; learning motivation; personnel certification. The management of people in organizations is undoubtedly related to many things: the selection of the company's personnel and the creation of teams, the assignment of tasks, the reporting of results with the evaluation of the work performance of each member of the staff, remuneration, efforts and results of work, training and the professional development of staff members, as well as other aspects of human relations in work. Managers (or most of them) undoubtedly understand that managing people is overcoming chaos and its replacement with an order conditioned and created by their desire to achieve efficiency of activities and processes in the company. To manage people means, first of all, to influence them so that managers and managed jointly achieve the previously set goals of the company. According to Yosif Iliev, "the modern management of the company's human resources can be characterized by directing the behavior of people at work in such a way that what the company needs, its members can, want and do as best as possible staff".

( <https://books.unwe.bg/wp-content/uploads/2015/03/Pages18.pdf> )

### ***Assessing the current HR capacity:***

Based on the organization's strategic plan, the first step in the strategic HR planning process is to assess the current HR capacity of the organization. The knowledge, skills and abilities of your current staff need to be identified. This can be done by developing a skills inventory for each employee.

The skills inventory should go beyond the skills needed for the particular position. List all skills each employee has demonstrated. For example, recreational or volunteer activities may involve special skills that could be relevant to the organization. Education levels and certificates or additional training should also be included.

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An employee's performance assessment form can be reviewed to determine if the person is ready and willing to take on more responsibility and to look at the employee's current development plans.

### ***Forecasting HR requirements:***

The next step is to forecast HR needs for the future based on the strategic goals of the organization. Realistic forecasting of human resources involves estimating both demand and supply.

Questions to be answered include:

- How many staff will be required to achieve the strategic goals of the organization?
- What jobs will need to be filled?
- What skill sets will people need?

When forecasting demands for HR, you must also assess the challenges that you will have in meeting your staffing need based on the external environment.

How will the external environment impact our HR needs?

### ***Gap analysis:***

The next step is to determine the gap between where your organization wants to be in the future and where you are now. The gap analysis includes identifying the number of staff and the skills and abilities required in the future in comparison to the current situation. You should also look at all your organization's HR management practices to identify those that could be improved or new practices needed to support the organization's capacity to move forward.

Questions to be answered include:

- What new jobs will we need?
- What new skills will be required?
- Do our present employees have the required skills?
- Are employees currently in positions that use their strengths?
- Do we have enough managers/supervisors?
- Are current HR management practices adequate for future needs?



### *Developing HR strategies to support organizational strategies:*

#### Training and development strategies

These strategies include:

- Providing staff with training to take on new roles
- Providing current staff with development opportunities to prepare them for future jobs in your organization
- Training and development needs can be met in a variety of ways. One approach is for the employer to pay for employees to upgrade their skills. This may involve sending the employee to take courses or certificates, or it may be accomplished through on-the-job training. Many training and development needs can be met through cost effective techniques.

#### Recruitment strategies

These strategies include:

- Recruiting new staff with the skill and abilities that your organization will need in the future
- Considering all the available options for strategically promoting job openings and encouraging suitable candidates to apply
- Each time you recruit you should be looking at the requirements from a strategic perspective. For example, if your organization has several supervisors that are nearing retirement age, your recruitment strategy should include recruiting staff with the ability to assume a supervisory role in the near future.

#### Outsourcing strategies

These strategies include:

- Using external individuals or organizations to complete some tasks
- Many organizations look outside their own staff pool and contract for certain skills. This is particularly helpful for accomplishing specific, specialized tasks that don't require ongoing full-time work.

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- Some organizations outsource HR activities, project work or bookkeeping. For example, payroll may be done by an external organization rather than a staff person, a short-term project may be done using a consultant, or specific expertise such as legal advice may be purchased from an outside source.

When deciding to outsource to an individual, ensure you are not mistakenly calling an employee a consultant. This is illegal and can have serious financial implications for your organization. To understand the differences between employees and self-employed people, visit the Canada Revenue Agency's website.

Each outsourcing decision has implications for meeting the organization's goals and should therefore be carefully assessed.

#### Collaboration strategies

The strategic HR planning process may lead to indirect strategies that go beyond your organization. By collaborating with other organizations you may have better success at dealing with a shortage of certain skills.

Examples of collaboration include:

- Working together to influence the types of courses offered by educational institutions
- Working with other organizations to prepare future leaders by sharing in the development of promising individuals
- Sharing the costs of training for groups of employees
- Allowing employees to visit other organizations to gain skills and insight

#### Restructuring strategies

If the assessment indicates that there is an oversupply of skills, there are a variety of options open to assist in the adjustment.

These strategies include:

- Reducing staff either by termination or attrition
- Regrouping tasks to create well designed jobs
- Reorganizing work units to be more efficient





Termination of workers gives immediate results. Generally, there will be costs associated with this approach depending on your employment agreements. Notice periods are guaranteed in all provinces. Be sure to review the Employment and Labour Standards in your province or territory to ensure that you are compliant with the legislation.

Termination packages are governed by case law as well as by employment standards legislation (which only states the bare minimum to be paid). Consult with a lawyer to determine the best approach to termination packages.

It is important to consider current labour market trends (e.g., the looming skills shortage as baby boomers begin to retire) because there may be longer-term consequences if you let staff go.

Sometimes existing workers may be willing to voluntarily reduce their hours, especially if the situation is temporary. Job sharing may be another option. The key to success is to ensure that employees are satisfied with the arrangement, that they confirm agreement to the new arrangement in writing, and that it meets the needs of the employer. Excellent communication is a prerequisite for success.

Your analysis may tell you that your organization may have more resources in some areas than others. This calls for a redeployment of workers to the area of shortage. The training needs of the transferred workers need to be taken into account.

### ***Implementing the strategic HR plan***

Once the HR strategic plan is complete the next step is to implement it.

- Agreement with the plan

Ensure that the board chair, executive director and senior managers agree with the strategic HR plan. It may seem like a redundant step if everyone has been involved all the way along, but it's always good to get final confirmation.

- Communication

The strategic HR plan needs to be communicated throughout the organization. Your communication should include:

- How the plan ties to the organization's overall strategic plan
- What changes in HR management policies, practices and activities will be made to support the strategic plan

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- How any changes in HR management will impact on staff, including a timeframe if appropriate
- How each staff member can contribute to the plan
- How staff will be supported through any changes
- How the organization will be different in the future

It is impossible to communicate too much (but all too easy to communicate too little), especially when changes involve people. However, the amount of detail should vary depending upon the audience.

- Legislation and mandate

Ensure that the actions you are considering are compliant with existing laws, regulations and the constitution and bylaws of your organization.

- Organizational needs

Whether you are increasing or reducing the number of employees, there are implications for space and equipment, as well as existing resources such as payroll and benefit plans.

- Evaluation

HR plans need to be updated on a regular basis. You will need to establish the information necessary to evaluate the success of the new plan. Benchmarks need to be selected and measured over time to determine if the plan is successful in achieving the desired objectives.

[\(Strategic HR Planning | CCHRSC\)](#)

## 2. Strategic planning of HR Roles

An effective human resources (HR) management department can help provide organizational structure and the ability to meet business needs by managing your business’s most valuable asset – your employees.

Several disciplines make up the HR department, and human resources managers working at smaller companies might perform more than one of the main duties: talent management, compensation and benefits for employees, training and development, compliance, and workplace safety.

### The 15 Key Human Resources Roles

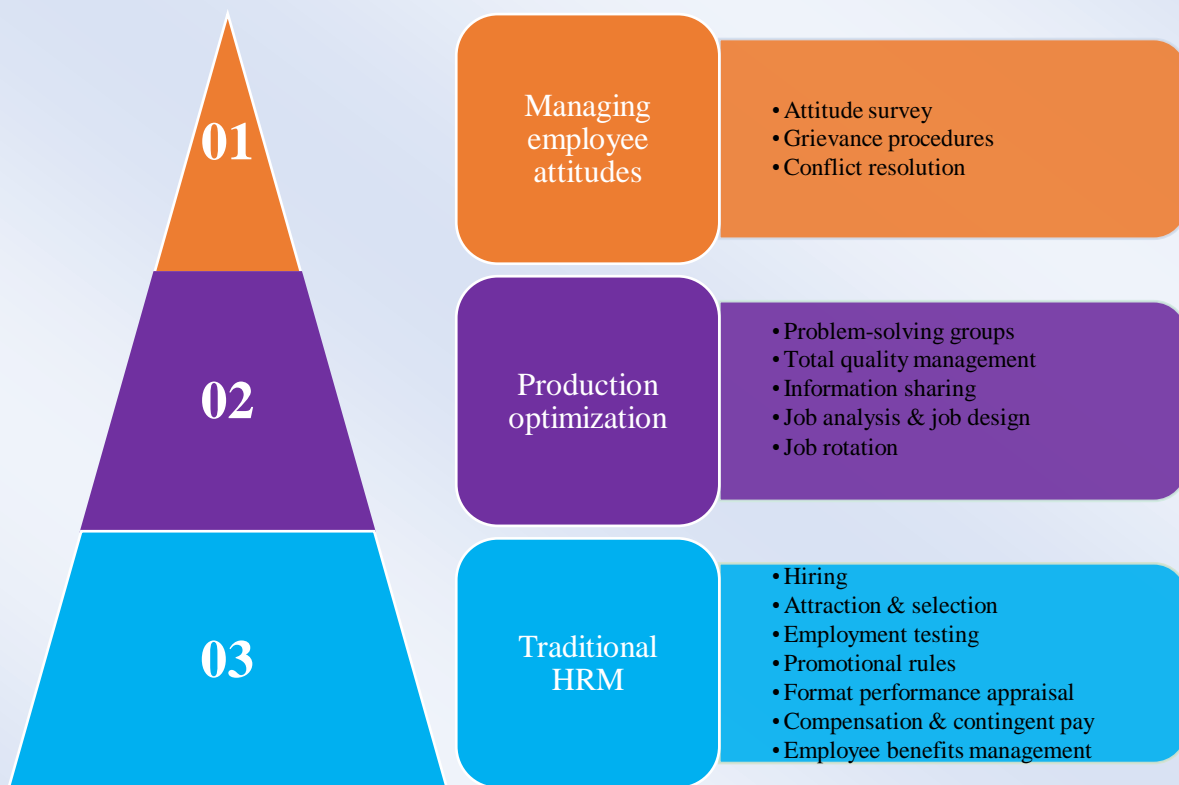


Figure 1, Source: Academy to Innovate HR, <https://www.aihr.com/wp-content/uploads/AIHR-15-Key-HR-Roles.png>



- Talent Management

The talent management team in the HR department covers a lot of ground. What used to be distinct areas of the department have been rolled up under one umbrella. The talent management team is responsible for recruiting, hiring, developing, and retaining employees.

When hiring an external candidate, attracting prospective employees is crucial. This happens through employer branding, in which the company promotes itself in the job market. This can be measured through the selection ratio, which is the ratio of candidates hired divided by the total number of candidates. It is up to HR to make sure that sufficient eligible candidates are attracted and eventually the right people are hired. Hiring the right people involves employment testing, also known as selecting, another key Human Resources role.

Recruiters are the heavy lifters in building any company's workforce. They're responsible for the total hiring process including posting positions on job boards, sourcing candidates through job fairs and social media, serving as the first-line contacts for running background checks to screen candidates, conducting the initial interviews, and coordinating with the hiring manager responsible for making the final selection. A recruiter's success is determined by several key metrics: the number of positions they fill each year, where candidates are coming from (e.g., job postings, social media, career fairs, etc.), the time it takes to fill positions, and reasons why an applicant wasn't hired.

Selecting is the responsibility of HR to test how suitable candidates are for a job. Although this is something that is often outsourced to professional testing-providers, the process should be managed by HR

Hiring is one of the key Human Resources roles. An important distinction is that between hiring from outside vs. hiring from within. Through employee training and smart succession planning, companies can create a so-called talent pipeline. Internal hiring is preferred as it enables a company to fill jobs with internal talent that already knows the company and is ready for a challenge. A lot of companies can improve their internal hiring practices. If the right talent isn't available internally, HR needs to hire external talent.

Employee relations or support is the area of the talent management team that is concerned with strengthening the employer-employee relationship. Human resources managers in this role

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study job satisfaction, employee engagement, organizational culture, and resolving workplace conflict. If the company has a unionized workforce, this team will also work on labor relations, including negotiating collective bargaining agreements, creating managerial responses to union organizing campaigns, and interpreting labor union contract questions.

Employees are tested to make sure that they will perform to the best of their ability in their new role. Performance appraisal also called performance review or evaluation is a method to evaluate the job performance of the employee. In most companies, this is an annual or bi-annual event. These appraisals facilitate communication between employee and manager, enhance the employee's focus, help in setting professional and personal goals, improves performance, and help in determining training needs. Although the performance appraisal cycle is something that a lot of employees and managers are unhappy with, it still is a very effective tool to improve results when done right. Increasingly, companies are opting to go for more continuous feedback as an alternative, which may have some merit. However, an official moment to review performance is still widely considered a best practice and one of the key roles for HR.

The talent management group is also home to HR practitioners who focus on workforce planning and management. This area includes succession planning and retention efforts across the business, from the C-suite on down. When an employee resigns, retires, is fired or laid off, gets sick, or dies, the workforce planning team kicks into action.

In line with hiring from within, setting rules for promotion is also one of the responsibilities of HR. Promotions are usually based on merit and/or seniority. They are part of an effective succession planning and are a great way to retain top performers who are eager to learn and develop themselves.

It is up to HR to put in place procedures that enable the internal movement of talent through promotions. Promotions should not be handed purely based on current performance but should also account for predicted future performance. Organizational change and design are macro-level interventions that will affect the entire organization. Here again, the OD or organizational effectiveness unit will provide key input and design HR interventions that will help to achieve the change and build a more effective organization. This is another key HR role.



- Compensation and Benefits

In smaller companies the compensation and benefits roles can often be overseen by one or two human resources professionals, but companies with a larger workforce will typically split up the duties. HR functions in compensation include evaluating the pay practices of competitors and establishing the compensation structure. The compensation department is also responsible for creating job descriptions in tandem with department managers, as well as working with talent management on succession planning.

Fair compensation is a key Human Resource Management role. Work is not done for free – it is governed by a legal contract and by a social contract between the worker and the employee. Both contracts need to be managed.

On the benefits side, HR practitioners are typically responsible for functions such as negotiating group health coverage rates with insurance carriers or coordinating with the company's 401(k) administrator. Of course, payroll is also part of the compensation and benefits area of HR, but many companies choose to outsource this function to a bookkeeper or payroll service provider. Those that don't generally put payroll practitioners in a separate team that works on the tactical process of generating payroll, with the compensation team focusing mainly on planning and strategy.

Employees work for more than just pay. Creating the right benefits for employees is crucial in retaining key talent. The easiest way to select the right benefits for your employees is to just ask them. Some employees value learning and development, others look for extra pension plans, and a third group may want company-organized childcare.

By accommodating these needs, HR can create tremendous value for individual employees that leads to increased motivation, satisfaction, productivity, and retention.

- Training and Development

Every company wants to see its employees thrive, which means providing them with all the tools they need to succeed. These tools aren't necessarily physical such as laptops, job-related software, or tools for a particular trade; they can include new employee orientation, leadership training programs, personal and professional development, and managerial training. Training

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and development (sometimes called learning and development) is an integral part of the HR team. Depending on the type of employee role played at the company, the training team might be responsible for building out instructional programs that have a direct effect on the success of the business. Today, many colleges and universities offer degrees in training and development; an instructional design degree would also be helpful in this role.

Learning and development activities as well as high-impact leadership development contribute to building relevant skills within the workforce. This involves upskilling the workforce in skills that align with organizational goals and the changing context of people's jobs. Learning and development activities often align with employees' personal development plans as well as with the core capabilities that the organization is building.

Activities include formal training, enabling on-the-job learning, job rotation to provide people with broader work experience, and providing challenging assignments (e.g., in problem solving groups) that help solve organizational issues while also contributing to individual learning.

Problem-Solving Groups, also known as quality circles, are teams of employees who are actively involved in problem-solving. Groups are composed of volunteers that meet a few hours every week or two to look at productivity and quality problems. These groups have a special type of leader or facilitator. HR can help in the creation of these groups, ensure optimum team composition, and plays a role in facilitating these teams to make an impact.

Organizational development revolves around interventions to make the organization more effective. Techniques include job analysis and job design but also macro-level activities such as organizational change and organizational design processes.

The most tangible OD process in HR is arguably job analysis. Whenever a new job is created (or when an old job opens up), the first step to hiring the right person is to define what the 'right person' should look like. This is done in the job analysis.

Job design is similar to job analysis. Any job should have a variety of skills and tasks. In addition, a job should be significant and the holder of the job should have a degree of autonomy. Job design is related to job rotation, job enlargement (giving more responsibilities to the employee), and job enrichment (increasing the employee's autonomy over their work).



- HR Compliance

Legal and regulatory compliance is a critical component of any HR department. Employment and labor laws are highly complex, and having a team devoted to monitoring this ever-changing landscape is essential to keeping companies out of trouble with federal, state, and local governments' laws. When a business is out of compliance, it can result in applicants or employees filing claims based on discriminatory hiring and employment practices or hazardous working conditions. The compliance practitioner or team must fully understand employment laws such as the Fair Labor Standards Act (FLSA), the Family Medical Leave Act (FMLA), Title VII of the Civil Rights Act of 1964, the National Labor Relations Act of 1935, and dozens of other rules and regulations.

The HR compliance team is also heavily involved—working in tandem with other HR practitioners—in developing all company policy that makes up the employee handbook.

Compliance management includes handling grievance procedures and conflict resolution. Grievance procedures have never been more relevant as shown by the Harvey Weinstein scandal and the #metoo movement. HR has a crucial role in handling grievance procedures and spotting, making tough decisions, and resolving issues early on instead of letting them fester for years. In cases of reported or suspected abuse, theft, misusing company funds or time, and other unethical behavior, HR is in the lead to resolve this.

Conflict resolution is another part of compliance management. Spotting conflicts early on and resolving them swiftly and effectively pays a tremendous dividend in the long term. Successfully resolving conflicts is the final key responsibility of HR. Best practices are to have predefined structures in place, communicate everything in writing, and, if possible, apply mediation to solve problems in an amicable way.

Data management is one of the latest HR roles to be added. It encompasses the ability to make data-driven decisions, characterized by the ability to read, understand, create, and communicate data and information and influence decision making. This role involves the ability to work with metrics and KPIs, the ability to conduct data analysis (also known as people analytics) and create dashboards, and translate these insights into actions.





- Workplace Safety

Of course, every company wants to provide a safe place to work for its employees, and the Occupational Safety and Health Act of 1970 (OSHA) actually mandates that employers provide a safe working environment for their workers. A large focus area for HR is developing and supporting safety training and maintaining federally mandated logs in the event injuries or fatalities happen at work. In addition, this department often works hand-in-hand with benefits specialists to manage the company's Workers' Compensation filings.

(<https://www.paycor.com/resource-center/articles/the-5-main-roles-in-hr/> )

(<https://www.aihr.com/blog/human-resources-roles/>)

### 3. Importance of Strategic HR Planning

The skills and ability of staff members, as well as their willingness and desire to perform their work as best as possible, are a significant indicator of efficient people management, including and an indicator of harmony between the interests and goals of the firm, on the one hand, and the interests and goals of its personnel, on the other hand. Organizations can only develop their full potential by realizing the potential of their employees. Profits and return on investment are important to the existence of business organizations, but the perception of staff as an expense must be changed. Strategic human resource management is based on the concepts of human resource management and strategic management. It can be seen as a continuous process consisting of a series of activities, i.e. strategy formulation, strategic planning, implementation, review and updating. There are different definitions: Strategic management is a set of decisions and actions leading to the formulation and implementation of strategies developed to achieve the goals of the organization. Strategic management deals with policy decisions affecting the entire organization, the overall goal being to place the organization in a position to deal effectively with its environment. Strategic management means that managers look ahead to what they need to achieve in the medium or relatively long term. Although, as Fombrun et al. put it, they are aware of the fact that businesses—like managers—must perform well in the present to succeed in the future, managers are concerned with the broader questions they face, and the general directions they should follow to deal with them and achieve the long-term goals.

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They do not take a narrow or limited view. Strategic management deals with both management goals and the means to achieve them. As a goal, it describes the vision of how something will look like in a few years. As a means, it shows what the expectations are for this vision to be realized.

Strategic management is therefore visionary management concerned with creating and conceptualizing ideas about where the organization should go. However, it is also empirical management, which describes how in practice it will get there. Strategy is a means of creating value, and the starting point is top management's vision for achieving it. Therefore, the focus is on identifying the organization's mission and strategies, but attention is also paid to the resource base necessary for success. Managers who think strategically have a broad and long-term view of where they are going. However, they will also realize, first, that they are responsible for planning, how resources will be allocated to the capabilities contributing to the implementation of the strategy, and second, for managing those capabilities so as to add substantial value to the results, achieved by the company.

The purpose of strategic management is expressed by Kanter, who is convinced that strategic "plans explain current actions for the future" and become "means of action – integrating and institutionalizing mechanisms for change". She continues: Strong leaders set direction and save the organization from change due to veering off course... They have a vision for the future that allows them to see more clearly what steps to take, building on today's opportunities and strengths.

<https://books.unwe.bg/wp-content/uploads/2015/03/Pages18.pdf>

An HR strategic plan can be important for businesses for many reasons.

Below, you can find some of the key reasons:

- Predicting HR needs

A business that fully understands its current and future human resource requirements can be in a sound position to optimise its present HR situation and plan appropriately for its potential future HR situations. The ability to plan for future HR requirements can help a business ensure it has the right roles, filled by the right people with the right skills at the right time. It means

HR managers can expect and develop skills that are critical to the business while maintaining a good ratio of accessible skill sets to the number of employees.

- Enhancing productivity

HR strategic plans help put the right people in the right roles, which can boost efficiency and create higher levels of business productivity. HR strategic plans are also significant in the promotion of employee satisfaction because they help a business devise the necessary requirements for meeting its employees' needs. Employees that feel satisfied in their roles and work environment are more likely to feel committed to the business and deliver higher output.

- Increasing retention

Strategic HR planning often focuses on employee engagement. There's usually a direct correlation between employee engagement and employee retention. HR strategic planning also allows a business to establish pathways for talented employees to follow to develop their careers within the business. Providing opportunities for continual development and career progression can be fundamental to assisting a business with retaining its employees.

- Reducing costs

Predictable HR requirements, enhanced productivity, increased retention and optimised performance are all factors that can help a business reduce its costs. When a business can predict its HR needs and optimise performance, it can have the right people in the right roles working the right shifts. This can contribute to better efficiency and reduce unnecessary resource expenses. Increased retention rates can also significantly reduce the capital requirement for recruitment and onboarding.

[\(5 Reasons Why a Human Resource Strategic Plan Is Important | Indeed.com Australia\)](#)

#### **4. HR Strategy Best Practices**

Best practices refer to those that are applied by the best organizations operating in similar conditions and pursuing similar goals (Wagner, 2009, p. 69). They are applied to achieve continuous improvement of organizational performance and competitiveness by critical assumption of conceptual and system practices in management of the best organizations in a specific sector or region. Using best practices allows implementation of significant changes on



an easier, faster and cheaper basis (Axson, 2007, p. 34). Their application is based on benchmarking, a systematic process of comparing organizational performance and competitiveness with the performance and competitiveness of the best organizations in a specific sector or region. The purpose of benchmarking is to understand why comparable organizations are better, how they have become the best in their sector or region and then take advantage and implement the necessary changes to improve organizational performance and competitiveness according to one's own conditions (Dvořáková et al., 2004, p. 6).

The application of best practices in human resource management is associated with the global research on human resource management. The approach based on application of best practices in human resource management is one of the alternative approaches to research the link between human resource management and organizational performance and competitiveness (Delery and Doty, 1996, p. 802). The approach based on application of best practices in human resource management assumes that there are universally applicable practices in human resource management that positively influence organizational performance and competitiveness more or less regardless of the conditions of their application. In contrast, the approach based on best fit in human resource management assumes that no practices in HRM can be applied universally but rather should always be applied with regard to the conditions of a particular organization (Harris, Brewster and Sparrow, 2003, p. 56–57). The explanation of the positive impact of human resource management on organizational performance and competitiveness as well as the validation of the application of best practices or best fit in human resource management are fundamental goals of the ongoing global research on human resource management. Although many researchers apply different conceptions of human resource management as well as different conceptions of organizational performance and competitiveness (Boselie, Dietz and Boon, 2005, p. 71–77) and achieve different results about the relationship between human resource management and organizational performance and competitiveness (Marchington and Wilkinson, 2005, p. 72), they demonstrate the positive impact of various practices in human resource management on organizational performance and competitiveness (Armstrong, 2007, p. 39–40). Their results support the idea that assumptions of both approaches – best practices and best fit – are valid and crucial in explaining the essence of the positive effect of human resource management on organizational performance and competitiveness (Larsen and

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Mayrhofer, 2006, p. 191–193). In other words, in human resource management, there are universally applicable best practices that positively influence organizational performance and competitiveness, but their application requires best fit to the conditions of the organization that determine the positive effect of applied best practices in human resource management on achieved organizational performance and competitiveness.

Managerial Implications - There is no doubt that managers who want to achieve excellent performance and the sustained competitiveness of their organizations must pay attention to management and leadership of employees because their abilities, motivation and performance determine organizational performance and competitiveness. Managers need the optimal system of human resource management based on proven practices in job design, employee selection, performance management, employee compensation or employee training that will enable them to employ and develop enough capable and motivated employees and to achieve expected organizational performance and competitiveness by achieving desired employee performance.

Job Design - Job design is the process of defining main tasks and grouping them together to form needed jobs in the organization. In view of optimal management and leadership of employees, it is important to design jobs that will satisfy the needs of both employees and organizations. Managers have to design motivating jobs, i.e. complex, various, significant and autonomous jobs using regular feedback. A complex job is integrated and meaningful, with visible output. A variable job makes it possible to do various activities and use various practices and so use and develop one's own knowledge and skills. A significant job gives certain influence on the internal and external conditions of the organization. An autonomous job makes it possible to control one's own work and act relatively independently. Using regular feedback about actual performance and working conditions from managers to employees and from employees to managers enables managers and employees to improve performance and working conditions. Motivating jobs evoke the sensation of usefulness, importance, responsibility, fellowship and make it possible to use and develop employees' knowledge, skills and motivation. Employee Selection Employee selection is the process of identifying the probably best applicant who has the required abilities and motivation to successfully perform in the job.

In view of the optimal management and leadership of employees, it is important to pay special attention to employees' personal characteristics. Employees must be capable and motivated to

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cooperate and communicate and use and share their knowledge and skills to perform the necessary work and achieve the desired results of the organization. To assess the required personal characteristics of applicants, managers can use various interviews, tests or assessment centers. Employees' knowledge, skills and motivation to cooperate and communicate create and improve conditions for voluntary and mutual sharing and use of employees' knowledge and skills in the organization.

Performance Management - Performance management refers to the management and leadership of employees to achieve the desired performance (results and behavior). The process of performance management usually has three repeating stages through which managers ensure that employees' abilities, motivation, results and behavior are consistent with expected goals of organizations. The first stage – performance agreement – includes a written or verbal agreement between a manager and an employee about particular aspects of performance that are relevant to the requirements and objectives of the job and the organization. For optimal management and leadership of the employee, it is important to agree also on the development of employee's knowledge and skills necessary for successful performance in his or her job. The second stage – performance management – means daily management and leadership of the employee to meet the given requirements and achieve the expected goals of his or her job. For optimal management and leadership of the employee, it is important to lead the employee to effective and efficient cooperation and communication and voluntary and mutual sharing and use of his or her knowledge and skills in the organization. The third stage – performance appraisal – provides the necessary feedback from the manager to the employee and conversely from the employee to the manager through the appraisal interview at the end of the agreed period. The purpose is to appraise employee's performance, find a way to solve eventual problems and agree on performance requirements for the next period. For optimal management and leadership of the employee, it is important to evaluate the actual level of his or her knowledge and skills necessary for successful performance as well as his or her abilities and motivation to cooperate and communicate. The process of performance management is essential for efficient and effective management of employees' abilities, motivation, results and behavior in the organization. Employee Compensation Employee compensation is the process of offering

compensation to employees for work done. A modern compensation system includes both

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monetary compensations (wages and salaries) and non-monetary compensations (benefits like mobile phones, notebooks, cars, flexible hours, home working, housing, insurance, sick leave, medical and dental care, vacation, holidays, leisure activities, training, etc.). In view of optimal management and leadership of employees, the applied compensation system would have been fair and stimulating to find, employ and keep capable employees and motivate them to cooperate and communicate and use and share their knowledge and skills in the organization. The fair and stimulating monetary and non-monetary compensations should motivate employees to permanent and systematic improvement and development of their abilities, motivation, results and behavior.

Employee Compensation - Employee training is the process of learning knowledge and skills that enable employees to successfully perform in their jobs and to meet changes in conditions and requirements of their jobs. The process of employee training must be permanent and systematic. In view of optimal management and leadership of employees, it is important to motivate employees to permanent and systematic training of their knowledge and skills. Employees who have some specific knowledge and skills should be involved in the process of training as trainers and mentors. It increases the motivation of employees and improves the conditions for voluntary and mutual development, sharing and use of abilities, knowledge and skills in the organization.

Organizational performance and competitiveness are determined by employee performance. The essence of the positive relationship between best practices in human resources management and organizational performance and competitiveness is the optimal system of human resource management that enables to employ and develop capable and motivated employees and achieve expected organizational performance and competitiveness by achieving desired employee performance. The relationship between various best practices in human resource management and operating, market and financial results of an organization is mediated by the abilities, motivation and performance of employees and is influenced by environmental conditions. Among proven practices in human resources management that demonstrably enable to influence employee abilities, motivation and performance are best practices in job design, employee selection, performance management, employee compensation or employee training.

Managers who want to achieve excellent performance and sustained competitiveness of their

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organizations need to apply the optimal system of human resource management based on proven practices in job design, employee selection, performance management, employee compensation or employee training. Successful human resource management requires one to design motivating jobs that will satisfy the needs of both employees and organizations, to select employees by paying attention to their personal characteristics, to apply performance management that enables achievement of expected performance and competitiveness of the organization by achieving desired performance of employees, to apply fair and stimulating monetary and non-monetary compensation system that enables one to employ capable and motivated employees, and to apply systematic training of employees to teach employees to perform their jobs and prepare them for changes of their job. In human resource management, there are useful best practices that positively influence organizational performance and competitiveness, but their application requires best fit to environmental conditions (political, economic, legal, technical, cultural, social, etc.) that determine the positive effect of applied best practices in human resource management on achieving organizational performance and competitiveness.

[\(\(PDF\) Best Practices in Human Resource Management: The Source of Excellent Performance and Sustained Competitiveness\)](#)

### **HR Practices vs. HR Activities**

The HR function includes two key areas – HR activities and HR practices. Both must work together to enable the HR department to operate in a streamlined manner within the organization. But without a clear understanding of both, it is possible to integrate the two. Here are a few differences between HR practices and HR activities.

#### Examples of HR practices

- HR practices are strategic in nature including planning, organizing, and managing the department.
- They represent a vital guidance system that coordinates with the executive business plan.





- They include the mission and goals of the HR department and how those goals align with the overall organization's goals and policies.
- HR practices are carried out through employees and influence three important outcomes- career, success, employee performance and employee potential.

Example of HR practices – formulating a method to measure and analyze the effects of an employee rewards program, creating a program to reduce work-related injuries, building a framework to adhere to employment laws, etc.

#### Examples of HR activities

- HR activities include the daily operations involved with running an HR department such as recruitment, training, payroll, surveys, employee relations and benefits.
- Allows the mission and goal of the department to be carried out using activities and other methods that are readily available and accessible.
- Comprises transactional activities to be handled either in-house or by outsourcing.

Example of HR activities – writing job descriptions, posting job ads, onboarding employees, managing payroll and benefits, hiring and firing, the administration of health benefits, etc.

In the most basic terms, HR practices look at the questions of what an organization wants to do and why, while HR activities address how to accomplish them.

#### How HR Best Practices are changing in 2023

With unprecedented employee turnover, rapid market shifts, and disruption of global supply chains have left organizations dealing with constant change. To prepare and stay ahead of the curve, here's how the HR best practices are changing to help leaders and organizations thrive in 2023.

##### 1. Change management for leadership

As profound shifts occur in your business strategy, consistently offering leadership training can help the organization effectively manage change. Transition support and change management training for leadership improves the effectiveness of strong leadership and sets leaders up for success.



## 2. AI & machine learning

The introduction of AI and machine learning has made it easier for all HR professionals to streamline and improve their recruitment and hiring processes. Furthermore, AI and ML also help boost every employee's productivity by automating tedious tasks.

## 3. HR digital transformation

As we move into a more agile world of work, HR transformation is becoming increasingly vital. The right approach to HR transformation can make or break business outcomes. Leaders need to decide whether they will hold onto old frameworks on the verge of becoming obsolete or embrace new tools and operating models as they reimagine ways of working.

Choosing the right HR software and technology is the most crucial component of HR digital transformation that sets your organization apart as a leader in the new world of work. Therefore, it is important to carefully consider what software is suitable for your approach that can automate and streamline processes, reduce time to hire, make onboarding more efficient, and move the needle on diversity and inclusion initiatives.

## 4. Self-service portals

The HR technology trend of employee self-service is expected in the modern workplace. It provides HR departments a way to become more efficient by automating manual tasks and allows organizations to re-imagine the core responsibilities of the HR team. The employee self-service (ESS) portals empower employees to manage their employment information. This reduces HR's tactical duties to give them more time for strategic efforts such as building their learning and development (L&D) strategy or managing their talent pipeline.

In an article on the same topic, **Disha Gupta** does an even more detailed breakdown by summarizing 12 HR best practices to adopt in 2023. These practices are listed as follow:

### 1. Rewards and recognition

At its core, employee recognition is the open acknowledgment and appreciation expressed for an employee's contributions to the organization. Rewards and recognition programs have the ability to impact many aspects of a business, including employee engagement, turnover, productivity, and morale.

### 2. 360 feedback

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360 feedback is a system where employees are given anonymous and confidential feedback on their competencies by their direct reports, manager, peers, and even customers. To conduct feedback 360, an online anonymous feedback form is sent to about 7 to 12 people that covers questions on a broad range of competencies related to the employee's job.

This system enables HR to collect unbiased feedback, better understand HR development requirements (training, behavioral, leadership etc.), and get a holistic perspective about a potential leadership candidate.

### 3. Knowledge-sharing culture

Knowledge sharing is an internal knowledge management process that empowers employees to exchange information or skills with their peers. Sharing knowledge improves your employees' sense of belonging within the organization, improves teamwork, increases engagement, reduces support training costs and tickets, and enables the entire workforce to become experts in their field and their organization. To build a knowledge-sharing culture, HR teams can:

- Hire a knowledge manager.
- Invest in a knowledge base software tool.
- Creating a set of internal guidelines to explain how employees should share their knowledge can make the process easier for them to follow.

### 4. Transparency

Your employees often may not like or agree with a particular decision, but clueing them in on it will impact their attitude towards it. Transparency is one of the essential HR best practices as it fosters trust, trust fosters security, and security fosters loyalty.

Access to business information should be available to all employees to foster buy-in through inclusivity. Sharing business successes and failures with your employees makes them feel motivated and engaged with the organization.

### 5. Ongoing training program

Engaged employees are always more productive and motivated to do jobs in the best way possible, which is why providing ongoing employee training and development programs is one of the most crucial HR best practices. Effective training enhances your employees' knowledge and makes them proficient in their jobs to give better results. Furthermore, regular learning and



development initiatives create a culture of engagement, make individuals feel valued and invested in their work, prevent workplace contentedness, and keep employees motivated.

Invest in digital adoption platforms like Whatfix to get the maximum ROI on your employee training and development programs. Using DAPs as your training software empowers employees to upskill themselves on the latest tools, applications, or processes without disrupting their workflow and productivity. It's the best resource to make your employee development plans future-ready and valuable.

#### 6. Engagement and open communication

Keeping employees engaged in today's competitive marketplace is critical to a business's success. When employees find their jobs challenging, engaging, and rewarding, they're more likely to stick around and invest themselves in their work.

HR plays a crucial role in employee engagement and ensures involvement by promoting an environment of mutual trust. Open and transparent communication encourages innovation, collaboration, and sharing of ideas and experiences.

HR leaders need to effectively communicate with their employees on everything from expectations and responsibilities to larger company goals and organizational decisions — but communication needs to be a two-way street. Employees should also feel comfortable expressing their ideas or concerns to the HR.

#### 7. Compliance

Lack of compliance with local, national, and international labor legislation can blow any of your HR practices out of the water. Therefore, it is crucial to have a labor law expert on board, either as an employee or as a service provider, to whom you can run all your HR policies, procedures, and contracts for approval before implementing. Also, ensure that management and staff are updated with their rights and legal parameters.

Additionally, compliance training is mandatory to familiarize your employees with regulations and laws governing an organization or a particular job role. These training initiatives help minimize risk, ensure workplace safety, and improve the overall work environment for employees.

#### 8. Prioritize workplace safety



Although workplace safety has always been important, there is definitely a renewed focus on this critical HR practice since COVID. Here are a few things for the HR teams to consider when working to create a safe environment for their employees:

- Regularly sanitize desks and computer monitors with disinfectant.
- Follow social distancing while placing employee desks.
- Mandate wearing masks for all employees.
- Implement workplace safety programs.
- Personal protective equipment should be safely designed, constructed, and fit comfortably.
- Employers should encourage employees to take regular breaks to prevent tiredness and fatigue.

#### 9. Flexible work opportunities

Employees are attracted to flexible working schedules because flexibility makes them more productive by giving them the freedom to work – when and how they want. The luxury of the non-traditional work schedule reduces employee stress, increasing their productivity.

Organizations offer flexible work hours to promote a healthy work-life balance, attract top talent, boost employee morale, and promote employee engagement and retention.

#### 10. Cloud-based HR software

HR software help manage, optimize, and automate HR tasks. These systems are often cloud-based subscription models that easily integrate with existing apps and can be customized to suit an organization's needs, goals and budget. Implementing HR software is a vital HR best practice because they help reduce time spent on low-impact admin tasks, sparing the HR professionals more time to spend on the most—productive, strategic outcomes. Other significant benefits include:

- Reduced human error.
- Improved data organization.
- Robust people analytics.
- Continuous feedback.
- Compliance with federal regulations.

#### 11. Selective hiring

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Selective hiring enables organizations to bring in employees who add value. It involves developing hiring strategies that are more proactive in their approach to attract highly-qualified candidates with specific skill sets. Selective hiring includes – HR teams conducting a thorough job analysis of the vacant positions, looking into the publicly available labor force data to target recruits, and reaching out to current employees for referrals.

Selective recruitment benefits organizations in terms of cost savings over time. Less time and money is wasted recruiting and interviewing candidates who aren't the right fit for the position.

## 12. High-performance teams

High-performance teams are crucial for any company when it comes to achieving success. Creating and nurturing high-performance, effective teams is one of HR's key responsibilities. A highly effective team is innovative in problem-solving and is known for displaying a high level of communication and collaboration, delivering consistent and superior results.

Different methods can be used to facilitate teamwork, such as measuring team performance, rewarding team excellence, and implementing communication software, feedback tools, project management tools, etc.

[\(https://whatfix.com/blog/hr-best-practices/\)](https://whatfix.com/blog/hr-best-practices/)

Another perspective on the topic is provided by **Jeffrey Pfeffer**, who summarizes the best 7 HR practices. Pfeffer wrote two books *Competitive Advantage through People* (1994), and *The Human Equation: Building Profits by Putting People First* (1998). In these books, he proposes a set of best practices that can increase a company's profit. When these HR principles are combined (or bundled), their impact is even more profound.

- Providing security to employees

The first Human Resource best practice is employment security. Life is unpredictable and work is a stable factor that is very important to most people. Having an employer who enables the employee to provide for themselves and their family is, in essence, the number one reason why people come to work.

There is both a formal contract (labor for money) and an informal contract (you put in some extra effort, we take good care of you) between the employee and the employer. Employment



security enables employees to go home after work and provide for themselves and their families. This concept of security is essential and underpins almost everything HR does.

When this employment security is threatened, for example when there is a restructuring or a layoff, you see this immediately ripple through the organization.

Employment security also benefits organizations because it helps them retain their people. When employees are laid off, for example, it's usually the organization that pays the price. They are the ones who have invested in the selection, training, and development of these employees. This is a costly process. If the organization doesn't work on retaining its people, they are more likely to leave and work for the competition.

- Selective hiring: Hiring the right people

The second HR best practice is selective hiring. This enables an organization to bring in employees who add value.

You can't just hire anyone; you want people who are fit for the job. Companies do their utmost best to hire exceptional people because they add the most value to the business. There also needs to be a prioritization of building a structured and fair selection process. This reflects legal requirements, internal diversity goals, and that a more diverse workforce, better reflects society. This can be hugely beneficial for understanding wider consumer behavior and the needs of different customers.

Bringing in the right people is, therefore, a key to building a competitive advantage.

In today's digital world, there are a lot of different recruitment tools we can use to make the right selection. More and more companies vigorously keep track of their recruitment metrics to see how well they are doing in this regard.

Commonly used selection instruments are structured and unstructured interviews, IQ tests, personality assessments, work tests, peer assessments, and reference checks. These (pre-employment) assessments are used to uncover three key candidate characteristics.

**Ability:** Is the person able to do the job? Does the person have the right technical and soft skills?  
Is the person smart enough to do the job well?

**Trainability:** Can we train this person to improve his/her skills? Has the person the aptitude to learn and keep developing?



Commitment: Will the person commit to his/her work and to the organization? Will we be able to retain this person once he/she is up to speed and fully productive?

- Self-managed and effective teams

We all know that teamwork is crucial in achieving goals. High-performance teams are crucial for any company when it comes to achieving success.

Teams provide value because they consist of people who are, and think differently but are working towards a common goal. This means that different ideas are generated to help achieve the goal. These ideas are then processed and combined, resulting in the best ones being selected. The best teams are cognitively diverse and psychologically safe. This means that team members can generate ideas that are different while feeling comfortable bringing these up and discussing them.

Creating and nurturing high-performance teams is one of HR's key responsibilities. **Belbin's Team Role Inventory** is a popular tool for team creation and cooperation. Effective HRM includes directly supporting teamwork by involvement in how teams are organized. This can be done in several ways. Measuring team performance, rewarding team excellence, and advising management on techniques and tools to facilitate teamwork are some methods.

Individual personality assessments also help understand how other team members think and behave. Understanding these processes is one of the main responsibilities of a manager. This is the reason why a lot of management courses focus on it.

Different tools facilitate teamwork. Examples include communication software, feedback tools, project management tools, and other task and goal setting software. These can facilitate communication and help teams be more efficient.

Finally, HR needs to encourage different teams to work together in the organization. A team is usually part of a larger entity, like another team or a department. These larger entities also need to work together. Facilitating this helps to build an efficient and effective organization. One of the tools that can be used for this is **Organizational Network Analysis**.

- Fair and performance-based compensation





Contingent compensation is the fourth Human Resource best practice. It has everything to do with compensation and benefits.

First of all, if you hire the right people, you want to compensate them above average. These are the people that will add the most value to your company so you want to retain them and pay them fairly. This is an example that shows how different best practices work together to provide more value than they would alone, in this case, selective hiring, contingent compensation, and employment security.

Paying people above the norm also has some potential disadvantages. For instance, it discourages bad employees to leave. However, if you're consistently hiring world-class performers, an above-average compensation is a must.

This sort of compensation package can take the form of financial (base) pay and employee benefits. You must follow market trends across your field, and adjacent fields (many of the best employees may come from other career areas). Then you will be able to understand the average rate of pay and where your company ranks in the compensation offer.

Secondly, you want to couple individual rewards with the different types of contributions that employees make. These are performance-related rewards. By coupling organizational performance outcomes with individual rewards the individual is incentivized to maximize this outcome. It also creates a sense of ownership for the employee.

Think of profit sharing, shared ownership, or stock options for instance. These are great ways to create employee commitment to the company's long-term vision and retain high potentials. Compensation is a key element for successful talent management.

In line with the previous, this type of co-ownership is usually not meant for all employees. **Lepak & Snell (2002)** offer a good model to assess how important individual employees are.

- Training in relevant skills

This HR best practice states that companies should invest heavily in training time and budget for its employees.

After recruiting the best people, you need to ensure that they remain the frontrunners in the field. This has become even more relevant today as the rate at which technology is developing is growing exponentially. This is where learning and development come in.

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How do we create an organization in which the rate of learning matches the pace of change? Learning has become a way to stay innovative, grow faster, and sustain a competitive advantage.

Employers increasingly invest in skills-specific forms of training. According to the Economist's Lifelong Learning special report, the number of on-demand courses has grown exponentially. Thanks to the internet, everyone is connected and can learn anything, anytime, anywhere.

In addition to formal learning, on-the-job learning also plays an important role. Increased focus on feedback, coaching, and peer learning plays into this. This is part of the often quoted 70|20|10 rule:

- 70% of learning is from challenging assignments
- 20% of learning is from developmental relationships
- 10% of learning is from formal coursework and training

Learning is also becoming increasingly important for the latest generations, such as the Millennials and Generation Z. According to Gallup, younger employees rate learning and personal growth as much more important compared to older generations.

The next generation of workers is actively looking for development opportunities and sees these as a way to grow in their profession. Not offering these opportunities is related to higher levels of employee turnover. In 2023, one of the key HR trends will be bringing learning to employees' day-to-day work and taking a more strategic approach toward developing the soft and hard skills organizations need on board to be competitive.

- Creating a flat and egalitarian organization

This best practice in HR principles is rooted in the egalitarian practices of Japanese management. Although we just saw that some employees are more critical than others for the organization's success, this shouldn't be communicated in such a way. Every employee is a valuable member of the organization and should be treated as such.

In Japanese organizations, this is expressed with common canteens, company uniforms, and similar sickness and holiday entitlement. Such an egalitarian culture shows that everyone deserves equal respect and could help in promoting the sharing of ideas.

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- Making information easily accessible to those who need it

Information sharing is essential. This is an area where a lot of large companies struggle: How do you keep track of who knows what, so you know where to go with your questions?

According to Pfeffer, there are two reasons why information sharing is so important.

Firstly, open communication about strategy, financials, and operations creates a culture in which people feel they are trusted. It truly involves employees in the business. As an additional effect, it discourages hear-say and negative informal chatter.

Secondly, if you want your people to share their ideas, they need to have an informed understanding of what's going on in the business.

Being informed about the business is also something that employees often mention as something they find important in attitude surveys, as well as having a chance to contribute to and influence decisions affecting their working life.

HR activities often contribute to communication across the workforce. This could be by creating sub-groups for people from diverse backgrounds, such as women and LGBT individuals. HR may assist in or lead on, the production of internal newsletters and updates.

- Synergies between HR best practices: Bundles

When these best practices are combined we call them 'bundles'. Bundles create synergies. This is how Human Resource Management can create a competitive advantage for the organization.

An example. Guaranteeing employment security will only benefit you when you have high-performing employees. Otherwise, what's the use of retaining them? This means that the employment security best practice, combined with selective hiring leads to more value than individual practices.

The same goes for selective hiring, extensive training, and contingent compensation. You want to select employees with growth potential, invest in them with learning and development, and reward them appropriately when they show superior performance. A third example is the reduction of status differences and information sharing. By encouraging open communication



and sharing relevant information, you create a culture of improvement in which employees feel free to give suggestions and collaboratively help to improve the business.

By leveraging these bundles, effective HRM can add tremendous value to the business and help the organization succeed in reaching its goals.

- Human Resource Management best practices: a reality check

According to Kurt Lewin, there's nothing more practical than a good theory. However, each theory has its drawbacks. It turns out that some of these best practices contradict each other.

Take employment security. This practice sounds nice in theory but in reality, companies are increasingly working with flexible contractors. These contractors lack the security that traditional employees have and provide the company with additional flexibility. According to Marchington and Grugulis (2000), "the reality is that employment security is only offered when and for as long as it is convenient to the employer".

Another example is training. A lot of organizations have implemented the extensive training principle. However, simply delivering training doesn't add to the company's competitive position. The way formal training is provided in organizations often offers several concerns:

- Formal training programs may be directed to skills that are not in line with the employee's work
- Employees are provided access to training simply because of the excess budget instead of business needs
- There's often more emphasis on being trained than on the impact of training

In other words, extensive training only adds value as long as it helps individuals and teams contribute to the strategic goals of the organization. This is in line with the Kirkpatrick-Philips model, which helps measure training effectiveness. This model helps assess whether training had a measurable impact on performance and whether the training investment provided a positive return on investment (ROI).

A final example is selective hiring. This best practice holds that if a company can consistently hire top performers, they will outperform their competition. However, it is almost impossible



to consistently hire top performers. The reality is simpler: if you consistently hire better candidates than your competition, you will create a competitive edge.

(<https://www.aihr.com/blog/human-resource-best-practices/#:~:text=The%20first%20Human%20Resource%20best,why%20people%20come%20to%20work.>)

## **IX. How to develop a Strategy for the professional development of employees (key steps)**

### **1. Describing the mission, vision and values of the organization**

The first key step in the development of the Strategy for the professional development of employees is describing the mission, vision and values of the organization. Defining all these aspects is part of the strategic planning process but they all have a different objective. They may be written for organizations or for individual departments. The vision, mission, and values guide the behaviors of people in the organization (O'Donovan, K., 2020).

THE MISSION is a concise explanation of the organization's reason for existence. It describes the organization's purpose and its intention. The mission statement supports the vision and communicates the purpose and direction to employees, customers, and other stakeholders. It conveys to stakeholders why the organization exists and explains how it creates value for the larger community.

Because it is more specific, the mission statement is more actionable than the vision statement. It leads to strategic goals. Strategic goals are the broad goals the organization tries to achieve. By describing why the organization exists, and where and how it will compete, the mission statement allows leaders to define a coherent set of goals that fit together to support the mission. When drafting a mission statement, one must consider the following questions:

- What is the organization's purpose?
- Why does the organization exist?

Here are some examples of mission statements (according to Lumen, 2023):

- Life is Good: To spread the power of optimism
- Patagonia: Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis
- Invisible Children: To end violence and exploitation facing our world's most isolated and vulnerable communities

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- Honest Tea: To create and promote great-tasting, healthy, organic beverages
- JetBlue Airways: To inspire humanity—both in the air and on the ground
- Tesla: To accelerate the world's transition to sustainable energy

It is very important to distinguish between mission and vision of the organization. They are often confused, and many organizations use the terms interchangeably. However, they each have a different purpose. The vision describes where the organization wants to be in the future; the mission describes what the organization needs to do now to achieve the vision. The vision and mission must support each other, but the mission is more specific. It defines how the organization will be different from other organizations in its industry.

THE VISION looks forward and creates a mental image of the ideal state that the organization wishes to achieve. It is inspirational and aspirational and should challenge employees. When drafting a vision statement, one must consider the following questions:

- What problem is the organization seeking to solve?
- Where is the organization headed?
- If the organization achieves all strategic goals, what would it look like 10 years from now?

Here are some examples of vision statements (according to Lumen, 2023):

- Disney: To make people happy
- IKEA: To create a better everyday life for the many people
- Microsoft: Empower every person and every organization on the planet to achieve more
- Avon: To be the company that best understands and satisfies the product, service and self-fulfillment needs of women—globally
- Sony Corporation: To be a company that inspires and fulfills your curiosity

The vision statement does not provide specific targets. Each of the above examples could apply to different organizations. Instead, the vision is a broad description of the value an organization provides. It is a visual image of what the organization is trying to produce or become. It should



inspire people and motivate them to want to be part of and contribute to the organization. Vision statements should be clear and concise, usually not longer than a short paragraph (O'Donovan, K., 2020).

THE VALUES are the core principles that guide and direct the organization and its culture. In a values-led organization, the values create a moral compass for the organization and its employees. It guides decision-making and establishes a standard against which actions can be assessed. These values are an internalized framework that is shared and acted on by the leadership (O'Donovan, K., 2020). When drafting a values statement, one must consider the following questions:

- What values are unique to the organization?
- What values should guide the operations of the organization?
- What conduct should the employees uphold?

The values statement can play an important role in supporting the goals of an organization. In conjunction with a values statement, a code of ethics puts those values into practice. It outlines the procedures in place to ensure the organization's values are upheld. Questions to consider when creating a code of ethics:

- What are common ethical issues in the field?
- What should someone do if they see a violation of the organization's values?

The values statement differs from both the vision and mission of the organization. The vision and mission state where the organization is going (vision) and what it will do to get there (mission). They direct the efforts of people in the organization toward common goals. The values statement defines what the organization believes in and how people in the organization are expected to behave—with each other, with customers, and with other stakeholders. It provides a moral direction for the organization that guides decision making and establishes a standard for assessing actions. It also provides a standard for employees to judge violations (O'Donovan, K., 2020).

The organization's management cannot create a new values statement and expect immediate change. For an organization to have an effective values statement, it must fully embrace its values and ethics at all levels and use them to guide its attitudes, actions and decision-making.





In conclusion, the vision, mission, and values form the foundation for all activities in an organization. The vision statement describes what the organization will become in the future. It is a broad and inspirational statement intended to engender support from stakeholders. The mission statement defines how the organization differentiates itself from other organizations in its industry. It is more specific than the vision statement and is intended to show how stakeholders' needs will be satisfied. The values statement defines how people in the organization should behave. It provides a guideline for decision making.

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## 2. Outlining the current services/programs of the organization

The next important step in the development of the Strategy for the professional development of employees is the outlining the current services/programs of the organization. Traditional organizations are recognizing themselves as service providers and defining and carefully outlining the current services offered is a good way to becoming a better service provider (Tarling & Keltanen, 2019).

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Outlining the services/programs is not just about putting the things an organization does in a list. It's about including what exactly the organization does to manage itself better, to organize its work and to deliver more valuable services to people, more efficiently.

It is important to outline services well because if organizations don't do it their internal efforts and priorities won't be aligned with what it takes to operate them successfully. Without a clear understanding of real-world service performance, it's too easy to become a bad service provider — and not be able to see it. Organizations that outline them well, aligning their internal work to services and their outcomes, are the ones that will become, and remain, the better service providers.

To outline a current SERVICE (according to Tarling & Keltanen, 2019):

- Define it from an external end user's point of view;
- Describe it in a clear and concise language;
- Outline the outcomes that relate to the organization's goals;
- Include all the steps between the user and provider;
- Include all the parts involved in delivering it.

To better outline the current services/programs the organization offers, one must take each point into account:

- A service is defined from an external end user's point of view

As mentioned in the previous section, all organizations have a purpose. They exist to change or achieve something. However, their focus is often on internal functions or departments, portfolios, projects, IT systems, etc. This misses the connection between the work of the organization and what users are doing. Instead, when an organization focuses on providing great services to external users, better outcomes, cost-saving or revenue follows.

We still need to think about the work an organization does internally. For example, when working on a (external) service, one needs to think through how it's delivered. This includes all the processes, tools and other things teams need to make their jobs possible, or easier. As well as all the systems and other parts, automated or not. There is much to improve, design and make decisions about.



Organizations do other things that are like a service, but where end users or stakeholders aren't exactly external. For example, when a team finds information or prepares reports for a minister's office. It is important not to confuse internally focused activities with the services for end users.

- A service's outline should describe something someone would want to do, in a clear and concise language

Services should be recognizable to someone with that specific need, described using plain language and starting with a verb.

Often what are called 'services' still reflect internal organizational structure and remit. This doesn't define or design services at a level that is about what someone wants to get done. To outline services practically, one needs to identify parts of them the organization can actually do something about.

The purpose here is to define services to help an organization see its work and impact from the outside-in. At a scale that makes sense for the services to be operated on an ongoing basis, actively improved over time by permanent, empowered teams (not just one-off redesigns).

Examples for services in the public sector:

- get training
- become an apprentice
- find childcare

Where the service is explicitly a part or subset of a larger whole service, one can link it with what someone actually wants to do. A team can then focus on improving, or on removing these parts, while working to redesign how the broader goal works for the better.

➤ A service's outline should include the outcomes that relate to the organization's goals  
Services don't exist purely because someone wants them. There are reasons organizations operate particular services. For example:

- a wider policy intent or organizational goal;



- a specific outcome this particular service is aiming to achieve (like access to good and quality education).

Describing the wider intent helps one know whether the service is supporting it. As well as how it's performing in terms of its specific job for users and the organization. This is a stronger place from which to (re)consider the best way to design and deliver it. Teams that don't spend time understanding these are going to find it hard to talk about service performance.

Services can run across several policy, operational areas, or organizations. They can each have different desired outcomes. If one only thinks about the services the organization or area provides currently and in full, they can miss the real picture, and interesting opportunities.

- A service's outline includes all the steps between the user and provider

A service includes all the interactions between a service user and a provider. Whether that's online, paper, phone, text, face to face or any other way.

While it doesn't have to work online to be a service, there is likely major room for improvement if it doesn't. One must identify which services are most in need of investment to improve. It's just as important to know about valuable and well-running face to face services, as well as costly, paper-based services that can be designed more efficiently.

Services also encompass all the steps, whether that's between people or computers. For a user, these are things like 'find out how to do something', 'choose the best option', 'apply', 'get something'. For a provider, it's things like 'check eligibility and suitability' or 'make a decision'.

Different types of service have common steps. Knowing these helps an organization identify and categorize common needs and problems. It doesn't mean one can develop a single way of, say, 'checking eligibility' for all services — how that's done is often completely different in important ways. But knowing the steps can help to place genuinely common components in context. Such as customer data repositories, ways of notifying users about something, etc.

- A service's outline includes all the parts involved in delivering it



Services include all their constituent parts. The internal capability, activities, tools, systems and relationships are a part of their delivery. The way in which an organization holds data. Or the contractual arrangements and service levels agreed with a provider. It isn't only the bits the user sees and interacts with.

This also means a service is not a component part in and of itself. It's not a website, a database, identification or authentication. Nor what internal team A does for internal team B. Not if one wants to re-think how things work more fundamentally.

Much of these internal things are needed for a service. But they're often shared across services. So, the way the organization does access and authentication, or its customer data repository, is a part of a set of services. In addition to being a component in its own right. The work involved in a service could create capabilities that other services could draw on.

In addition to outlining the current services, there are specific steps to follow as regards the outlining of the current PROGRAMS the organization offers. To outline them in the Strategy for the professional development of employees, the following steps should be followed (according to Program Planning for Organizations by Friendship-Keller, 2016):

➤ State the program objectives and solutions

Once the goals of the organization are identified and stated, it is important to include specific, realistic objectives. These smaller, more manageable targets that will lead to the accomplishment of each goal. The program objectives should be stated in a way that is as clear and realistic as possible.

Without realistic objectives, people often commit themselves to more than they can do and are unable to follow through or become overwhelmed by the size of the task and feel discouraged when things don't work. The objectives should be recorded and referred to frequently during the planning process.

The next step is to outline the Program solutions. At this stage it is important to be creative. The best solutions are developed when many members share their needs and interests, and therefore take responsibility for the program.

If the management were to ignore the creative ideas and allow decisions to be made by only a few, the group would lose power, energy and the human resources needed to do the job.

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Members will work harder in support of programs which they helped to plan. All members should be aware of the goals and objectives, no matter who was involved in setting them, in order to build commitment to the programs.

Members' input can be obtained from opinion polls, suggestion boxes, informal conversation, or by evaluation sheets. Questionnaires can ask "What do you want from the organization?", "What do you think the organization should do?" and "What did you think of past programs?" Discussion groups can be formed at a general meeting with each group reporting their program suggestions after a short discussion. Each group should have a representative who will also ensure that everyone has a chance to participate.

Brainstorming is another discussion technique used with either a large or small group of people. Participants should aim at producing a quantity of ideas rather than taking time to evaluate the quality of various suggestions. Every suggestion should be carefully recorded. Some proposals might not be practical solutions but they might lead to another idea. The least practical idea may lead to the best suggestion of the session by promoting further ideas.

➤ Outline the resources and selected methods

The list of programs should be examined and outlined carefully, and the pros and cons of each considered. Required time, money, and resources (physical and human) should be included. Provide answers to the following questions: Does the program involve all members? Is it interesting to everyone? Does it include both fun and work activities? Does it meet the objectives of the organization? Have alternative plans been outlined in case a problem arises?

➤ Include the details

With the program objectives stated clearly, the details and action steps leading to its implementation need to be outlined. Responsibilities must be assigned to accomplish these tasks. This is an opportunity to recruit others to help with specific tasks to both reduce the burden on some individuals and also to enlarge the number of people involved. The deadlines for each program must be stated as well as its impact on the target groups (for example, students).



➤ Include the participants' view

The final step is to include what the participants thought about the program. Consider how the success of your program is measured (progress towards goals, tasks left to be done, relevance of goals and other concerns should be outlined).

At the end, evaluate the accomplishment of the program goals, attendance and involvement of members as well as participants' reactions. What do they think might be improved? Include feedback from the participants in the program and answer the following questions: Are tasks done right? Are deadlines being met? Assess the communication within your organization (Did everybody understand the program's intent?).

All these steps will ensure that the current services and programs of the organizations are outlined in the best way to be included in the Strategy.

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### 3. Conducting a SWOT analysis

To develop an effective Strategy for the professional development of employees, a SWOT analysis must be conducted.

A SWOT analysis is a technique used when an organization wants to evaluate its overall effectiveness (Indeed, 2023b). It identifies and analyses STRENGTHS, WEAKNESSES, OPPORTUNITIES and THREATS using an objective approach. Implementing this approach can help an organization optimize its operations and excel within its field.

Many experts use SWOT analyses before they set team or organization goals to ensure they work toward appropriate milestones and to determine if their current operations are sustainable over the long term. The strengths and weaknesses portions identify internal components that

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affect an organization, such as intellectual property, location and employees. The opportunities and threats focus on external factors such as the cost of raw materials and consumer buying trends.

According to Indeed (2023b), the SWOT analysis is an effective tool for:

- Providing a systematic way of identifying internal and external factors affecting the organization;
- Giving organizations insight as to where to focus growth efforts;
- Presenting a solid foundation on which to develop strategies;
- Helping organizations look outward at their competitors and customers;
- Allowing organizations to determine whether new projects are viable and the pros and cons of implementing them

The following are steps on how to conduct a SWOT analysis (according to Indeed, 2023b):

➤ Choose a facilitator

Organizational leaders typically carry out SWOT analyses and rely on other team members to conduct a thorough evaluation. Leaders ensure they represent various departments and consider all relevant factors. Some organizations may also choose to include external members when conducting SWOT analyses. Facilitators are especially important if the organization has the resources to hire one, as their unbiased input produces more accurate results. The more diverse perspectives present throughout the analysis, the more comprehensive it is.

➤ Identify strengths

Once you have chosen the analysis's participants, the next step is to brainstorm the organization's STRENGTHS. Common strengths to consider include innovation, leadership, productivity and quality of products or services. Keep track of all suggestions made regarding strengths.

Some questions to consider include:

- What are the positive qualities?
- What achievements have been made?



- What helps with accomplishing goals?
- What resources do you have?
- What are the specialties?
- What sets your organization and employees apart from others?

➤ Determine weaknesses

While identifying the strengths can be easy, determining weaknesses may be more challenging. Organizations are more hesitant to identify their shortcomings. Insight can be gathered from stakeholders, team members and customers to understand where the organization might be lacking. More objective data can also be gathered by evaluating whether teams meet their quotas.

Some examples of questions to consider include:

- Internally, what makes it challenging to achieve goals?
- What are the areas for improvement?
- What is the organization lacking (resources, technology, people, etc.)?
- What is needed to tackle long-term goals?

➤ Analyze opportunities

The strengths and weaknesses can help with the identification of the opportunities. For instance, if the organization is marketing particularly well to a certain audience, a greater advertising budget can be allocated to capitalize on these consumers. If the evaluation of weaknesses concludes that marketing to a different audience is unsuccessful, this campaign can be ceased and the budget can be redistributed accordingly. Other examples of potential opportunities include new technology, lowered costs and expansion into new markets.

Here are some example questions to include:

- What products, services or information are popular with the audience/target group?
- Are there external resources that can be used to achieve goals?
- Can the organization benefit from any current trends?
- What technology will be popular in the future?

- How do stakeholders view the organization, brand, product or service?

➤ Identify threats

While threats are similar to weaknesses, they usually haven't directly impacted the organization yet. Their presence can cause stress on team members and employees, making it important to identify them and develop plans to mitigate or eliminate their potential effects. Threats to consider include a declining market, emerging competitors or new regulations that affect your production or overhead.

Here are examples of questions to identify threats:

- Is the market expected to be bad or turbulent?
- Is your product or service losing relevance?
- Do competitors have a certain edge over you?
- How does your audience/target group, industry or market view the organization?
- What could put the organization at risk?
- Are there potential new competitors on the horizon?

SWOT analysis template (for educational organizations):

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Things your institution does well	Things your institution lacks	Few competitors in your area	Emerging competitors
Qualities that separate you from your competitors	Things your competitors do better than you	Emerging need for your products or services	Poor student performance
Internal resources such as skilled, knowledgeable staff	Resource limitations	Press/media coverage of your institution	Negative attitudes toward your institution

Table 1, Source: Indeed (2023b). How To Conduct a SWOT Analysis in 5 Steps (With Example)., <https://www.indeed.com/career-advice/career-development/how-to-do-a-swot-analysis>

#### **4. Determination of strategic priority areas and goals (short-term and long-term)**

The next step in the development of the Strategy for professional development of employees is the determination of strategic priority areas and goals.

Strategic priorities areas can help organizations develop clear long-term goals for the future. By incorporating concise, actionable priorities, and following a detailed outline of the steps needed to achieve the goals, organizations can transform their objectives into measurable successes (Indeed, 2023c).

So, what are strategic priorities? They are important objectives organizations set with an aim of accomplishing them over a certain period. These priorities are usually organizational values or initiatives an organization wants to achieve foremost amongst a list of other strategic tasks. While businesses within the same industry might have similar priorities, priorities can be unique to a specific organization and its goals. As the organizations' internal and external environments shift and evolve, it's important to adjust the strategic priority areas accordingly.

Strategic priorities often contribute to an organization's core culture, purpose and philosophy, acting as a guide to its future success. It's common for these priorities to have an associated list of goals (short- and long-term and tasks).

The steps below can help determine the organization's priorities and incorporate them appropriately (according to Indeed, 2023c):

- Gather background information

Before determining the priorities, it's important to gather enough background information on the business to form a foundation for meaningful objectives. The background information might include the mission statement, a list of the core values and the results of the SWOT analysis (mentioned in the previous sections). The results can offer a deeper comprehension of the organization's strengths, weaknesses, opportunities and threats, which can be addressed and catered for throughout the rest of the strategic planning process.

- Understand objectives, resources and timing

To determine the strategic priority areas, the objectives, resources and timing need to be understood correctly. These variables often depend on each other and adjusting one of them can

affect the others. Resources have the largest effect on the other two variables. For example, when one knows what resources are available and for how long, they can be in a better position to determine reasonable time frames for achieving organizational objectives. Without resources, one might not have the means to meet the organizational objectives. By understanding the relationship between these variables, more attainable strategy priorities can be determined through effective data analysis.

➤ Determine priority levels

Rather than numbering the priorities in order of importance, it can be a good idea to categorize each priority as either a critical priority, important priority or desirable priority, based on the objectives, resources and timing. Doing this can help decide which priorities to include in the Strategy. The priority levels are the following:

- Critical priority: This level of priority typically has a non-negotiable deadline and usually requires the use of all available resources for completion. For example, if a business promises to deliver 100 units of a product to a customer by the second Friday of the month, it's likely to put all its resources into meeting that timed objective.
- Important priority: While this level of priority can have a significant positive impact, it's usually without a finite time frame for completion and often requires fewer resources. For example, an organization may aim to migrate its website to a new format within the next six to nine months by using small teams to complete the task.
- Desirable priority: priorities at this level are supplemental to other priorities. For example, an organization may wish to reorganize its filing system but might only allocate time and resources to doing this upon completion of more significant priorities.

➤ Utilize forward thinking

When determining which priority areas to include in the Strategy, it's a great idea to take a forward-thinking approach. Consider including priorities that can help the organization innovate and move towards its long-term goals. It can be beneficial to an organization's performance to elevate the priorities that require higher standards and demand progress, which are typically critical priorities.

➤ Consider core areas

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When deciding which priorities to include in the Strategy, it's helpful to conduct a SWOT analysis to identify the core areas that are crucial to the success of the organization. This can help determine which priorities are of higher value than others. It can be important to understand which areas are the pillars of its foundation to determine where to allocate available resources. For example, if employee satisfaction forms an organization's foundations, then you know to elevate the priorities within these areas.

➤ Include an attainable number of priorities

It's usually a good idea to limit the number of priorities you include in the Strategy. For example, including one to five priority areas. Limiting the number can allow leaders to communicate each priority clearly and employees to understand them easily. Limiting priorities can also ensure employees feel equipped to attain them, which can boost job satisfaction, workplace morale and productivity. An organization is likely to have several priorities competing for critical status. Include those that best align with the organization's values and long-term objectives.

➤ Create actionable and measurable steps

For the employees to work toward attaining organizational objectives, it's important that they have access to clear, actionable guidance. It's essential that specific requirements and step-by-step instructions accompany each strategic priority area.

➤ Finalize

When the priorities and steps for achieving them are determined, include them in the Strategy. This can include organizing the information in a way that's easy for people to read and understand. It may also include writing an outline or creating a spreadsheet to help navigate various areas. It can be beneficial to do it in a way that allows for easy sharing and updating. It can also be helpful to invite feedback and input from various roles and departments within the organization.

According to Indeed (2023c), there can be many benefits of determining the strategic priority areas, including:

- Establishing direction: Priorities help to define an organization's purpose. They can offer a direction by providing a foundation from which the organization can measure progress, compensate its workforce and make informed decisions with confidence.
- Enhancing proactivity: It's difficult for organizations to foresee all future circumstances. Having determined priorities in place can help the organization react to changes in the market proactively while considering its objectives.
- Increasing profitability: With focused and strategic thinking often comes the revealing of various markets, conditions and offerings that can enhance an organization's performance. This can direct marketing initiatives and enhance decision-making, all of which can contribute to greater profitability.
- Boosts workplace morale: Clearly defined priorities with actionable steps for achieving them can provide employees with a sense of purpose, focus and motivation. It's common for a team that feels motivated and equipped to contribute to an organization's overall success to have good morale.

The next important step in the development of the Strategy for professional development of employees is the determination of short-term and long-term GOALS.

According to McKay (2022), the goals should be SMART (Specific, Measurable, Achievable, Relevant and Timely). Using SMART goals will make them trackable, which makes it easier to complete important milestones. They need to be structured in a way that makes it easy to achieve them by completing small steps. It's helpful to list goals in order of priority with the highest first so they can be identified quickly.

To determine them effectively, they need to be realistic, positive and actionable. Flexibility is required as the goals may change in time (for example, in six months or one year). In addition to their careful definition, a detailed strategy must be designed for their achievement. It is imperative to include the steps needed to reach each one, along with ways to overcome challenges that might get in the way (McKay, 2022). Bear in mind that even very well-thought-out goals, don't always work out, and that is why it is essential to include alternatives that can be implemented when the need arises.

As mentioned above, goals are broadly classified into categories: short-term goals and long-term goals. A short-term goal is accomplished in approximately six months to three years, while

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it usually takes three to five years to reach a long-term one. Sometimes a short-term goal can be achieved in fewer than three months and a long-term one may take more than five years to complete.

To achieve a long-term goal, one must first accomplish a series of both short-term goals and additional long-term goals. For example, aspiring to become an educator. That may be the ultimate long-term goal, but one must achieve a few others like completing college, university and internship. In contrast, short-term goals require taking action every day or every week.

According to McKay (2022), in order to be determined effectively, short-term and long-term goals must be:

- Specific – it is important to include relevant details.
- Measurable: have a timeframe for achieving the goals and a way to determine when they are reached. They can be broken down into smaller milestones that can be measured along the way.
- Positive: The goal should be something one wants rather than something to avoid.
- Realistic: long-term goals must be compatible with abilities, skills and experience.
- Have a deadline - small steps should be taken over time to achieve the goal by the set deadline. It is not obligatory to have a deadline for the goal, but this may help to reach it. A long-term goal can be broken down into smaller goals. It is better to take baby steps than one big giant leap.
- Paired with an action: For instance, if the goal is to improve IT skills, sign up for a monthly seminar or training in the field.
- Flexible: Don't give up if you encounter obstacles that threaten progress. Instead, modify the goals accordingly. Flexibility also means being willing to let go of goals that are no longer meaningful and instead put your energy into pursuing other ones.

#### Used sources:

Indeed (2023c). *How to Create Strategic Priorities for a Strategic Plan.*

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## 5. Determining actions and initiatives to address the strategic priorities

Another important step in developing the Strategy is to determine carefully the actions and initiatives that need to be taken to address the strategic priorities. Carefully chosen actions and initiatives can position the organization for success in the future. They outline the specific steps an organization must complete in order to make its goals a reality. These actions and initiatives are essential to the strategy's execution and development. In many cases, initiatives comprise several different projects or strategies that function together and create a larger plan the organization strives to achieve.

An action/initiative should have the following characteristics (according to Achieveit, 2023):

- Defined goals
- Concrete steps
- Organized schedules and timelines
- Milestones
- Budgets
- Progress gauging

According to Achieveit (2023), for an action/initiative to address the strategic priorities, it should meet the following criteria:

- It must help achieve the strategic goals to better deliver value for clients/customers;
- It must imply a change or improvement, making it distinct from day-to-day operations;
- Resources, capital, and capacity must be prioritized and deployed to implement the initiative.

If there is doubt, the following questions can help: *Of all the things planned, which are the most important to accomplish the goals? If there are only resources to dedicate towards three (or four or five) initiatives, which would they be?*

These are called strategic initiatives. It's critical to recognize and differentiate these from other initiatives. Their successful implementation can heavily impact execution results.

TYPES OF INITIATIVES (Achieveit, 2023):

Regardless of the kind of industry one works in, there can be various types of strategic initiatives. Here are several examples:

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- Corporate level: This level concerns the markets the organization competes in. For example, a software company may want to expand its products into phone manufacturing or try to develop new hardware for its initiative.
- Business level: This initiative focuses on how to succeed over competitors.
- Functional level: Initiatives at the level of single departments or teams help the organization improve its internal processes and contributes to better programs.
- Corrective initiatives: Address issues within the organization and fixes them. For example, performance gaps can be located and work can be done to close them.
- Constructive initiatives: These initiatives address new methods and directions.
- Innovative initiatives: These initiatives introduce new products or ideas.
- Defensive initiatives: Maintain what currently works while defending against competitors.

In short, actions/initiatives that are in line with the strategic priorities help the organization and employees achieve specific goals while closing the gap between target and performance. Initiatives benefit leadership teams and employees, and build a strong foundation to review many projects.

Initiatives help organizations concretely define how certain issues impact their programs while focusing on achievable goals that will bring strong changes to the organization or community. Strategic initiatives help improve overall operations while reducing complacency among team members.

To determine effectively the actions/initiatives needed to address the strategic priorities, the following **MUST BE PREVENTED** according to Achieveit (2023):

➤ Lack of Alignment

One of the most critical issues to address is a lack of alignment. Misalignment may happen when initiatives do not express priorities, contrast values, or fail to address pressing issues. Whether or not the mission is successful does not matter if initiatives are misaligned, which can cause tension. These outcomes are not desirable, and programs should be prioritized to align with the established values and mission.

➤ Lack of Focus

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Lack of focus can look like prioritizing too many goals, creating stress on resources or failing to support staff members. Focus helps minimize the number of projects, allocate the correct resources and enough people to support the strategy. Even if resources are limited, the focus can be on projects that are most meaningful and achievable.

➤ Lack of Discipline

Discipline is essential while executing the initiative/action. However, when new opportunities come, some organizations may take resources away from other projects to focus on new ideas. As such, nothing ever succeeds. Instead, new opportunities should be evaluated whether they are relevant to the Strategy. If yes, the project can be pursued, and if no, it must be rejected and the focus must remain on the current Strategy. Discipline helps the organization stay competitive in the current industry.

As mentioned above, it is critical to determine initiatives/actions effectively. The following steps can help (Vermeulen, 2017; Achieveit, 2023):

STEP 1: Define the Initiative

One of the first steps is to define the initiative, clearly articulating the choices to be made. According to Freek Vermeulen and the Harvard Business Review (2017), many fail to implement proper strategies. In most cases, this is due to unclear choices or a failure to define the initiatives.

One of the best ways to define the strategic initiatives is to review the projects and gaps in performance consistently. An initiative often includes several goals that a team can use to focus on its mission and values. When the focus is on a few specific goals, one may better understand the strategy and how the ideas included can improve the community.

The initiative can be defined by setting measurable, specific, realistic objectives. This may help inform the overall definition by understanding the plans to achieve the determined goals.

STEP 2: Determine the Initiative's Scope

The next step is to define the scope. This consists of the necessary resources required to bring the plan to life. These resources should include financial, human capital and technological resources.



When defining the scope, don't forget what could go wrong. Identify key insights and risks that could compromise the successful execution. With the stakes understood, identify the appropriate mitigations for the identified risks.

With the initiatives/actions clearly defined and scoped, it's time to include the plan for their execution. Keep the following tips in mind to help you generate results:

➤ Create Alignment

Ensure that there is alignment for each item. Point out which areas of focus, goals, and outcomes are impacted by different bodies of work. If you're unsure where to start, ask: "How?" and "Why?". Understand how initiatives directly tie to organizational goals and key performance indicators (KPIs).

Alignment starts when employees understand their roles and how they affect the overall strategy. Success begins and ends with employees committed to their vision and performing achievable goals.

➤ Identify Supporting Activities and Milestones

Most of the initiatives won't be completed on their own. Supporting activities (actions) and milestones need to be identified that will increase the likelihood of generating desired results. The supporting activities and milestones must be appropriately resourced. Failure in these will impact the success of the overarching initiative.

One of the best ways to identify activities and milestones is by communicating clearly with ALL employees. Create a culture that celebrates milestones and strives to reach goals through incentives, well-organized schedules, and tasks.

➤ Drive Towards Measurable Outcomes

Plans often consist of a lot of qualitative information. This could be a color rating/scale or simple context on initiative completion.

However, initiatives and activities must drive toward measurable, quantifiable outcomes. With proper metrics, there is no question about what success ultimately looks like. This impacts completion and improves insight into how the initiative is progressing.



For example, if the aim is customer retention, the managers should be trained to monitor the goal's progress and drive workers toward excellence. Whatever you want to improve, the measurable outcomes must be tracked through numerical goals and KPIs.

➤ Establish Clear Start and Due Dates

Clarity around expectations is one of the best things one can establish in the process. Simply defining clear start and due dates is an easy place to start.

Ensure that the team often communicate about the goals through process maps or time-tracking tools online. The organization is key to creating a focused work environment that prioritizes tasks and completes each one promptly.

➤ Define Accountabilities

Select one person responsible for providing progress updates for each item. For many initiatives, there is a great deal of shared accountability and many people working towards completing one body of work. However, there should only be one person responsible for reporting on progress. This eliminates confusion about who to go to for status updates and reinforces accountability.

Another important step is developing a standard cadence of accountability. This cadence defines how often the organization will be requesting and reporting results. This will enable a standardized, quick way to understand how initiatives progress.

To encourage accountability in the workplace strategy evaluations and performance metrics can be applied. Consistent work reviews ensure that the team stays on track and works to improve any strategies that need to be changed. Feedback from others is also one of the best ways to gather insight into how well the tasks, process, and workflows are working.

**Used sources:**

<https://www.achieveit.com/resources/blog/how-to-develop-strategic-initiatives-and-how-to-execute-them/#types>

Vermeulen, F. (2017, November 8). Many strategies fail because they're not actually strategies. Harvard Business Review. <https://hbr.org/2017/11/many-strategies-fail-because-theyre-not-actually-strategies>

## 6. Defining expected outcomes/results

After successfully determining the actions and initiatives, the next aspect in the development of the Strategy should be the definition of the expected outcomes/results.

Defining the expected outcomes/results is an important process. In this case, we the words are used synonymously. In organizations, outcomes are the impact made by products, services, etc., and should be valuable experiences for the end-user. They're measurable and prove that the organization and the team/employees are on track with regard to achieving their goals (Personio, 2023).

According to Texas Tech University and Christiane Herber-Valdez, Ed.D., outcomes are the results one can expect from the intended work activities, and what the customer/learner is expected to achieve. In addition to this, they describe the consequences of the work, and the changes that will occur in customers/learners. At the operational level, expected outcomes describe what the department/office is expected to achieve and produce.

On the other hand, outputs are the methods used to achieve the results, or products or services produced by a business, industry, etc. in a specific time period, whether spent or utilized for further production. To identify the outputs and outcomes that will most effectively help the team reach their ideal goals, one has to understand the end-user and answer the following questions:

- What do the end-users want or need?
- What are their pain points (persistent problems with a product or service that can inconvenience them)?
- How does the business/product solve them?
- What benefits will the end-users gain?
- How will it positively impact their life?
- How will it make them feel?

Defining the outputs and outcomes/results not only allows to better empathize and serve the customers/users/learners but also leads to clearer processes, more engaged employees, and more opportunities for innovation for the team. According to Personio (2023), the benefits can include:

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➤ Never Losing Sight of The Goal

When the outcomes are well-known, one can stay focused on what really matters. The outcome/result should stay the same, but the output may change depending on the progress.

➤ Avoiding Confusion and Employee Disengagement

When the outcome is established then the team members can be tasked with producing the specific output. This, of course, is fine—but only if the team members involved are clear on why they're producing the output.

➤ Employees Won't Waste Time and Energy

Confusion can also cost time and money for the organization. When employees aren't confident in the purpose behind their work, they might put too much time and energy into an aspect of the project that's not as important because they don't know the real focus of it.

➤ Staying Off the Hamster Wheel

When the focus is only on producing the outputs and not enough on the outcomes/results, this puts employees on a “hamster wheel”. The employees will keep working away on the output, but it never brings them any closer to their main objectives.

To reap the abovementioned benefits, the outcomes must be specific, well-defined, and measurable results put forth to improve performance metrics. To determine the outcomes, leaders need to define a measurable goal, determine the time frame in which they need to achieve the goal, and consider how it impacts both their team and their clients or customers.

According to Personio (2023), some examples of common outcomes include:

- Adaptability - to keep up with shifting markets and trends, you may want to digitize your processes, integrate apps into your team and client communications, or expand your services and products with more modern solutions.
- Customer Relationships - this could include improving customer service, reviews, the overall customer experience, or long-term customer engagement and retention.
- Profitability - once the financial outcomes are determined, set the output to get you on track to achieving it.
- Performance - performance-related outcomes can include hitting sales goals, increasing the market reach, or improving the industry/organization's reputation.



Human Resource (HR) outcomes are slightly different and can be achieved through day-to-day activities, programs, and initiatives that aim to improve the employee experience. HR outcomes also impact business outcomes. The more supported the employees are by the HR team, the higher quality of work they'll produce, and the better their performance, which means higher profit for the organization.

These typically fall into one of the four following categories (Personio, 2023):

- Employee Satisfaction - this helps employees improve their overall happiness regarding their role, benefits, wages, work-life balance, opportunities for career advancement, and environment.
- Employee Motivation - employees are engaged in their work, motivated to do their best, and working towards achievable goals. In this case, the output could include creating recognition and rewards programs, referral programs, or learning and development courses.
- Employee Retention - In this case, HR is looking for more employee commitment and less turnover, which leads to a better reputation, a more stable workplace environment, and higher quality of work from knowledgeable long-term employees.
- Employee Presence - If the data shows an uptick in absenteeism, late arrivals, or early departures, strategies should be included to address the issue, such as disciplinary processes, reshaping PTO (paid time off, planned time off, or personal time off) and holiday programs, or creating incentives for positive attendance records.

**Used sources:**

<https://www.personio.com/hr-lexicon/outcomes-vs-outputs/#what-are-outcomes- and-outputs>

Texas Tech University – Health Sciences Center, El Paso. “Identifying Expected Outcomes For Your Effectiveness Plan”, Christiane Herber-Valdez, Ed.D. <https://elpaso.ttuhs.edu/>

## 7. Determining the timeline and budget for implementation

For the implementation of the Strategy, an important component is determining the budget and timeline.

What is budgeting? Budgeting is the tactical implementation of the strategic plan (Schmidt, 2023). To achieve its goals, a detailed descriptive roadmap is needed to set measures and indicators of performance. Changes can be made along the way to ensure that the desired goals are achieved.

Budgeting is a critical process in several ways (Schmidt, 2023):

- It aids in the planning of actual operations

The process gets managers to consider how conditions may change and what steps they need to take, while also allowing them to understand how to address problems when they arise.

- It coordinates the activities of the organization

Budgeting encourages managers to build relationships with the other parts of the operation and understand how the various departments and teams interact with each other and how they all support the overall organization.

- It communicates plans to various managers

Communicating plans to managers is an important social aspect of the process, which ensures that everyone gets a clear understanding of how they support the organization. It encourages communication of individual goals, plans, and initiatives, which all roll up together to support the growth of the organization. It also ensures appropriate individuals are made accountable for implementing the budget.

- It motivates employees to strive to achieve the budget goals

Budgeting gets managers to focus on participation in the budget process. It provides a challenge or target for individuals and managers by linking their compensation and performance relative to the budget.

- It Controls activities

Managers can compare actual spending with the budget to control financial activities.

- It evaluates the performance of managers





Budgeting provides a means of informing managers of how well they are performing in meeting targets they have set.

There are several TYPES of budgets. A robust budget framework is built around a master budget consisting of operating budgets, capital expenditure budgets, and cash budgets. The combined budgets generate a budgeted income statement, balance sheet, and cash flow statement. According to Schmidt (2023), the types of budgets are the following:

➤ Operating budget

Revenues and associated expenses in day-to-day operations are budgeted in detail and are divided into major categories such as revenues, salaries, benefits, and non-salary expenses.

➤ Capital budget

Capital budgets are typically requests for purchases of large assets such as property, equipment, or IT systems that create major demands on an organization's cash flow. The purposes of capital budgets are to allocate funds, control risks in decision-making, and set priorities.

➤ Cash budget

Cash budgets tie the other two budgets together and take into account the timing of payments and the timing of receipt of cash from revenues. Cash budgets help management track and manage the organization's cash flow effectively by assessing whether additional capital is required, whether the company needs to raise money, or if there is excess capital.

The budgeting process for most large organizations usually begins four to six months before the start of the financial year, while some may take an entire fiscal year to complete (Schmidt, 2023). Most organizations set budgets and undertake variance analysis on a monthly basis.

Starting from the initial planning stage, the organizations go through a series of stages to finally implement the budget. Common processes include communication within executive management, establishing objectives and targets, developing a detailed budget, compilation and revision of budget model, budget committee review, and approval (Schmidt, 2023).

When the goals, actions, and budget are all set, one of the remaining aspects is the timeline.

TIMELINES are pictorial representations of a schedule of events over a specific period (Indeed, 2022). They represent effective tools, as they help professionals determine how long a task may take. Understanding the steps for making timelines can aid in the execution of the Strategy.



Here are some of the steps that can be followed for making timelines (according to Indeed, 2022):

➤ Determinizing the goals and strategy

The first step in making a timeline is determining what you aim to achieve. Determining the goals helps you determine the most effective strategy to achieve them. After determining the goals, the strategy can be divided into component tasks. Then the duration each task is likely to take can be determined and the timeline can be created. Enough time must be spent on this stage to avoid forgetting any essential processes.

➤ Selecting a medium

After determining the goals and strategy decide on a medium to design the timeline. The traditional paper timeline is easy to create, cheap, flexible, and easy to navigate and understand. Alternatively, word processors can be used or design applications to create a digital copy. A digital timeline is easier to distribute, edit, and access. Another option is to use project management tools that allow you to create sophisticated timelines. Each medium has its advantages depending on the needs of the organization.

➤ Decide on a time scale

After determining the goals, an appropriate time scale can be decided. The time scale is the smallest duration on the timeline. For example, if the whole activity takes years, the time scale can be in months. A time scale makes it easier to divide the activity into smaller components, aiding execution and supervision. Selecting the right time scale can make the timeline is functional.

➤ Including events in the timeline

After determining the appropriate time scale and drawing the timeline, events can be included. Events on a timeline are the objectives, outcomes, or results that should be obtained in a set period. The events can be written under each date or can be represented with symbols. The approach used should makes it easy for team members to understand and use the timeline. For example, a brief description next to each event can be included.

➤ Customization



After the inclusion of all the events, the timeline can be customized so it's visually appealing and easier to understand. For example, using different colors to separate important events from regular ones. Lines with varying thicknesses can also be used to represent different divisions in the timeline. If the timeline is for official purposes, the company logo and other relevant information must be included.

➤ Implementation and monitoring

After the launch of the timeline, careful monitoring should be ensured. It may be a good idea to amend the timeline if the team consistently cannot meet deadlines. The team members can be asked for feedback on the timeline. Then this feedback and observations can be used when deciding on the best way to improve the timeline.

Here are some TIPS on how to use a timeline more effectively (according to Indeed, 2022):

➤ Highlight milestones

A milestone is a point in a timeline that marks a special event. For example, it may signify the start or end of a vital phase, a critical meeting, or the fulfillment of a certain requirement. Highlighting milestones allows the team to assess the project's progress and quality. Additionally, reaching milestones is a great way to improve employee morale and motivate them to do more work. To preserve their effect on the team, the milestones should represent significant events.

➤ Consult team members

As the timeline regulates the affairs of the entire team, it's important to consult team members before creating one. Consulting team members ensures a convenient timeline is created for everyone based on their strengths and weaknesses. Team members may also have unique insights to help make the timeline more effective.

➤ Ensure it's realistic

To create an effective timeline, it's vital it caters to the realities of the team and the activities. Ensure your teams maintain a consistent level of productivity by providing them with an appropriate amount of time to complete their tasks. A realistic timeline can improve employee morale, as they're unlikely to overwork themselves.

➤ Make it public

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Placing the timeline in a public place helps ensure team members stay focused on their tasks. Additionally, it makes it easier for team members to reference and analyze the timeline. The timeline can be displayed in the office or where the team usually holds its meetings. Be careful about using this approach with timelines containing sensitive information. In such cases, the timeline can be shared over secure team management applications.

➤ Keep it simple

A simple timeline is easier to understand and use, which aids execution. When customizing the timeline, simple colors should be used to make it easier for readers to focus on specific details. Don't limit yourself to using two or three colors to maintain a professional look. It's important to avoid crowding too many events on the timeline so it's easier to read. If the timeline is difficult to read, consider reducing the time scale so there are more units on the timeline.

➤ Send reminders

While creating timelines helps motivate team members, they can easily forget the timeline after leaving the workplace. Sending constant reminders is an effective approach to ensure team members stay focused. These reminders can be integrated with the timeline by aligning them with deadlines or deliverables. For example, if a team member has a submission due in one month, send reminders every three weeks. This aids accountability and helps preempt and resolve potential delays.

➤ Make provisions for mishaps

While making a timeline, it's important to consider the possibility of everything not going as planned. Providing room for mishaps in timelines reduces the risk of disappointing clients/customers/users, and improves professional image. While it's impossible to predict the future, common challenges associated with the activity can be researched. Then decide to reserve some time in case those challenges arise. Lastly, create a strategy for handling such issues.

➤ Automate the processes

There are various applications can be used to automate the timeline. For example, project management software can send automated reminders, alert team members of close deadlines,

adjust the timeline to reflect changes, and remove completed tasks from the timeline. Using automation can help aid communication, analysis, and decision-making.

Here are some BENEFITS of using a timeline (Indeed, 2022):

➤ It aids planning

The process of creating a timeline forces team members to analyze each aspect of the activity. Assigning realistic timelines may require research into component tasks, allowing the team to discover potential challenges. Teams can leverage this insight to improve their strategy and create effective plans for execution. A timeline makes it easier to track the project's progress and determine if there's a need for amending existing plans.

➤ It facilitates accountability

Timelines usually include the details of each task, including an outline of which employees are responsible for them. This makes it easier for the leader to demand accountability from team members. For example, team leaders can easily track those responsible for incomplete tasks.

➤ It informs decisions

Timelines help organizations predict when they can start and complete projects. This allows them to make long-term plans regarding the strategy. Timelines help with the making of long-term decisions with certainty, improving their efficiency. Timelines help organizations determine when they need resources, making managing them between several competing interests easier.

➤ It improves consultation sessions

Consultations can be tasking, as clients/customers usually have many concerns concerning quality and execution. A timeline is an effective way to aid these sessions, as they give customers vital information. When a client sees a well-designed timeline, they're more likely to trust your professional advice. Referencing a timeline makes it easier to discuss the activity with clients/customers.

➤ It aids team communication

Clear communication is a requirement for effective collaboration and overall team productivity. A timeline aids communication by offering a reference point everyone can understand. A well-designed timeline makes it easy for team members to understand their deadlines, how their tasks

interact with others, and their roles and responsibilities. As a result, team members know where to receive and pass information, improving overall efficiency.

- It motivates employees

Visualizing the duration and requirements of an activity can be an effective way to motivate team members. By clarifying each member's role and responsibilities they can focus their energy and resources more effectively. This can lead to better collaboration and an increase in overall productivity.

- It enhances efficiency

Creating a timeline encourages teams to analyze various aspects of their tasks to determine the appropriate duration for each. Analyzing component tasks can help team members identify and resolve problems with their strategy, aiding efficiency. Creating a timeline ensures the division of tasks into components that keep the team productive.

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## **8. Application of ISO 450003-2021 in the strategic HR management for identifying possible risks and preventive steps**

Identifying of possible risks is an important part of the preparation and implementation of the strategy in the field of human resources. In this chapter, we give good examples and show opportunities for managing psychological risks according to the ISO 450003-2021 standard regarding the COVID-19 pandemic as a risk factor. The choice of this risk factor is not random. As part of the same HAS project, we conducted an in-depth study of the effects of COVID-19 on teachers in Bulgaria, Poland and Cyprus, and the results strongly indicated that the COVID-19 pandemic had a negative impact on the psychological health and overall well-being of the target group mentioned. The results of the study are summarized in a separate document “Research on the attitudes of students and teachers on well-being and mental health”, part of Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.



the project outputs of the “Healthy at school. Supporting the well-being and mental health of students and teachers”/ HAS.

It should be taken into account that the ISO 450003-2021 standard can and is successfully applied to the management of other risks on psychological health and safety at work.

## THE COVID-19 PANDEMIC CONTEXT

The COVID-19 pandemic saw a massive change in the way organizations operate and had a significant impact on employees experiencing increased stress, anxiety, and depression as a result of factors such as remote work, social isolation, and financial insecurity.

In its 'EU Strategic Framework for Health and Safety at Work 2021-2027. Health and Safety at Work in a Changing World of Work', the Commission states that EU legislation on health and safety at work occupational health and safety (OH&S) is central to protecting the health and safety of almost 170 million workers in the EU. Protecting people from health and safety hazards at work is a key element in achieving sustainable decent working conditions for all workers. It has helped to reduce occupational health risks and improve OSH standards across the EU and across sectors. However, challenges remain and the COVID-19 pandemic has exacerbated the risks that need to be addressed.

Even before the pandemic, around 84 million people in the EU were affected by mental health problems. Half of EU workers believe that stress is common in their workplace, and stress contributes to around half of all lost working days. Nearly 80% of managers are affected by work-related stress.

As a result of the pandemic, nearly 40% of workers have started working remotely full-time. This blurs the traditional boundaries between work and private life, and together with other trends related to remote work, such as constant connectivity, lack of social contact and increased use of ICT, psychosocial and ergonomic risks have further increased.

The aftermath of the COVID-19 pandemic has seen a global mental health crisis that has necessitated immediate attention. This has also meant there is now a bigger focus on employers, how they manage psychological risks in the workplace, and what controls they have in place to ensure they are not contributing or adding an extra level of stress to their employees.



Over the course of the last few years, there is now greater recognition of employers' legal, ethical, and financial responsibilities to protect their employees' mental health and well-being. This includes a duty of care to provide a safe and healthy work environment that also addresses psychological hazards and risks.

The inception of ISO 45003:2021 “Occupational health and safety management — Psychological health and safety at work — Guidelines for managing psychosocial risks” requires organizations to ensure the psychological safety of their employees as part of their normal day-to-day operations. So, what exactly is ISO 45003 and how does it impact the organization and employees?

WHAT IS ISO 45003? (According to Rowe, 2023; ISO, 2021)

ISO 45003:2021 “Occupational health and safety management — Psychological health and safety at work — Guidelines for managing psychosocial risks” was published in June 2021 by the International Organization for Standardization. It provides guidance on managing psychological health and safety risks and aligns with ISO 45001 “Occupational health and safety management systems”.

This document is applicable to organizations of all sizes and sectors, including those that:

- a) have been operating throughout the pandemic;
- b) are resuming or planning to resume operations following full or partial closure;
- c) are re-occupying workplaces that have been fully or partially closed;
- d) are new and planning to operate for the first time.

This document also provides guidance relating to the protection of workers of all types (e.g., workers employed by the organization, workers of external providers, contractors, self-employed individuals, agency workers, older workers, workers with a disability and first responders), and other relevant interested parties (e.g., visitors to a workplace, including members of the public).

According to ISO 45003 (ISO, 2021), PSYCHOLOGICAL RISK in the workplace relates to the potential of psychosocial hazards causing a stress response which can cause psychological harm that impacts an individual’s health, safety and well-being.





PSYCHOSOCIAL RISKS (ISO, 2021) are related to negative psychological, physical and social consequences that are due to unfavorable organization and management and poor social context in the workplace, including but not limited to:

- Excessive workloads;
- Conflicting requirements and lack of clarity about the worker's role;
- Ineffective communication, frequent and/or poorly managed organizational change and job insecurity;
- Inadequate reward or recognition;
- Poor working conditions;
- Violence and aggression;
- Bullying and harassment, including sexual harassment; victimization, humiliating, degrading or threatening behavior of supervisors or colleagues towards employees or a group of employees;
- Workplace conflict or poor workplace relationships; lack of support from management and colleagues.

The guidelines outlined in ISO 45003 (ISO, 2021) are intended to help organizations meet their responsibilities in building safer and healthier workplaces. By expanding on the traditional focus on physical safety, organizations that implement the new standard can see a range of benefits for their employees and their organization as a whole, such as:

- Greater employee satisfaction;
- Increased employee engagement;
- Better workload balance;
- Increased productivity;
- Higher retention rates;
- Healthier workplace behavior;
- Safer and more inclusive work environment;
- Reduced absenteeism.



## THE IMPACT OF PSYCHOLOGICALLY UNSAFE WORKPLACES (according to Rowe, 2023; ISO, 2021)

The truth is that feeling psychologically safe at work can directly impact employee behavior. Due to the COVID 19-pandemic, the number of workers that have taken time off work (between 2020 and 2022) because of stress, anxiety or depression has significantly increased. But when an employee considers their work environment to have a negative impact on their mental health, that number can be even higher. Unsurprisingly, those missed days add up. The economy can lose billions because of reduced productivity and absences related to mental health.

But it isn't just about protecting the bottom line, it's about safeguarding employees from the risks associated with a mentally unhealthy work environment:

- high stress - workplace stress occurs when the demands on the worker exceed his ability to cope with them. It is one of the most important consequences of an adverse psychosocial work environment because workers who are exposed to prolonged stress at work can be affected by serious mental and physical health problems;
- fatigue;
- burnout;
- anxiety;
- depression;
- sleep disorders;
- cardiovascular disease;
- substance abuse;
- poor diet;
- social withdrawal and others.

## WHAT CAN THE ORGANIZATIONS DO (according to ISO, 2021; Rowe, 2023)

Effective workplace safety and health management benefits workers, organizations and society as a whole. It is especially important to keep this in mind during times of economic uncertainty, when it is essential to maintain productivity and when working under pressure to meet deadlines, when mistakes and accidents are most likely to occur. It may be tempting for organizations to dismiss occupational safety and health (OSH) issues as an 'administrative

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burden' and only comply with the statutory requirements of today's high-pressure workplace, but this would have a backfire effect. It is important to always be aware of workplace risks and how to manage them.

So, what can a psychologically safe environment look like? It can be as straightforward as employees feeling comfortable expressing ideas or concerns without fear of negative consequences. A healthy, psychologically safe workplace encourages open communication, trust, and respect among employees and management.

Here are some suggested steps on how to start addressing psychological risk in the workplace (ISO, 2021; Rowe, 2023):

- IDENTIFY all psychosocial hazards in the workplace;
- Prioritize the identified hazards based on a risk assessment;
- Ensure staff are able to report hazards and risks (the same as reporting physical);
- Have controls in place for mitigating hazards;
- Respond to reports and incidents when they arise and in a timely manner;
- Review processes regularly and solicit feedback from the workforce.

As it can be seen from these steps above, managing psychological risks can be addressed the same way physical risks are.

Lastly, one of the most important and key aspects when addressing psychological risks is PREVENTION. Instead of waiting for problems to arise, it is much more effective and efficient to take a proactive approach. With all the changes, this process can seem daunting to begin with, but once implemented, the benefits to both employees and organizations can be significant.

Various strategies (ways) for prevention and coping with psychological risks, incl. stress at the workplace, are known in the specialized literature (Rowe, 2023). These strategies can be divided into:

- Internal - a person tries to cope by using, changing, mobilizing his own attitudes, resources, competences, personal characteristics that can protect or control stress;
- External – referring to ways of coping through the resources of the environment (managers, organizational culture and politics, colleagues, relatives, psychologists, etc.).



Specifically described PSYCHOSOCIAL RISKS and recommendations for their PREVENTION are described in section 6 "Mental health and well-being" of ISO 45003 (ISO, 2021):

"6.1 The organization should establish processes to manage the impact of the pandemic on the mental health and well-being of workers.

Mental health and well-being can be affected by psychosocial hazards such as:

- a) uncertainty (for example, what is expected, how long the measures may last, impact on pay or working hours);
- b) workload and pace of work (for example, too much or too little work, expectations to meet tight deadlines even if activities take longer due to changed ways of working);
- c) working hours (for example, unforeseen working hours, reduced or extended working hours, new work shifts);
- d) role ambiguity (e.g., changes in what is expected of a role, new functions, lack of clarity);
- e) lack of control (for example, rapid changes in risk levels leading to sudden imposition or relaxation of restrictions or changed ways of working);
- f) lack of social support (e.g., loneliness, physical isolation, communication problems);
- g) impact of prolonged isolation and remote work (e.g., excessive screen exposure, fatigue, boredom, lack of concentration, insomnia);
- h) job insecurity (e.g., concern about possible job loss, domestic financial problems);
- i) difficulties in balancing work and family life (e.g., caring responsibilities, family emergencies, need to work outside normal working hours);
- j) specific roles that are at higher risk due to frequent, close or prolonged interaction with other people (e.g., contact staff, general access, mobile work);
- k) specific circumstances of the worker (for example, belonging to a vulnerable group, loss of a loved one or serious illness in the family).

6.2 To manage the mental health and wellbeing risks associated with COVID-19, the organization needs to:

- a) promotes a culture of trust, care and support, recognizing that individual workers face different problems and that concerns or difficulties are justified and respected;



- b) enable regular confidential meetings (remote or physical, as appropriate) to discuss problems and concerns and to agree ways of supporting the worker;
- c) conducts regular remote or physical meetings with teams of workers;
- d) allows for flexible working hours and free time;
- e) assist workers in establishing healthy boundaries between work and non-work time by communicating to them when they should work and be available, taking into account the need for flexibility;
- f) allow workers more control over the pace of work and deadlines, if possible;
- g) provides regular, clear and accurate information about the current situation in the organization and about planned changes that may affect employees;
- h) consider providing appropriate PPE, masks, face coverings and other control measures for workers who fear being in a physical workplace, even if the organization does not require it;
- i) offer additional resources to help workers manage their own mental health and well-being (e.g., online programs, websites, access to professionals offering bereavement, trauma, and financial advice).”

Again, ISO's aspiration is to preserve not only the physical but also the mental health of workers, which is purposefully listed in ISO 45003:2021 Occupational health and safety management – Psychological health and safety at work – Guidelines for managing psychosocial risks.

In conclusion, ISO 45003 seeks to cover all aspects of the work process in order to eliminate, reduce and limit occupational psychological and psychosocial risks (ISO, 2021). All of the above can be seen as possible proactive steps of the organizations in this direction, based on the judgment that workplace stress is an organizational and not a personal problem.

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## X. Conclusion

In conclusion, the Strategy for planning the professional development of employees in accordance with individual needs is a beneficial resource that creates a new approach and better support for competitiveness and employment in education. It supports organizations (incl. educational organizations) in developing a strategy for the professional development of employees and provides methods for identifying individual needs / personal-motivational, potential and deficits, needs, etc./ and for identifying training needs. Moreover, the product stimulates the professional development of staff/employees in organizations (including educational organizations).

The main target groups who benefit from the product as a useful tool are staff/employees in educational organizations such as teachers, educators, trainers, non-pedagogical staff, administrative staff, management staff, counsellors, pedagogical advisers, psychologists and other experts.

This resource is freely available online and translated into four languages – Bulgarian, English, Greek and Polish. It can be used by organizations (incl. educational organizations) to create a Strategy for professional development of employees.

As a result of the product, Strategies for the professional development of employees of the 3 partner organizations were developed, which are detailed in separate documents.



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## XII. Appendices

### Appendix 1: SWOT analysis Template

SWOT analysis template (for educational organizations):

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Things your institution does well	Things your institution lacks	Few competitors in your area	Emerging competitors
Qualities that separate you from your competitors	Things your competitors do better than you	Emerging need for your products or services	Poor student performance
Internal resources such as skilled, knowledgeable staff	Resource limitations	Press/media coverage of your institution	Negative attitudes toward your institution



## Appendix 2: Structured Interview Template

### Structured Interview Template

(WP3 A1)

**Organization:**.....

**Name:**.....

**Gender:** M/F

**Age:**.....

**Profession:**.....

I. 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?

.....

.....

.....





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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