Overview of Guidelines for Staff Training

Final version April 2023

Introduction

This document is meant for a holistic preparation of staff training, and it is aimed at NA staff and trainers facilitating the activities.

The **first part of the document**, **Practical and Financial Arrangements**, is more relevant for the NA staff and/or external persons contracted for logistical and organisational support. While it is recommended for the trainers/facilitators to go through that part too, especially looking at the practical arrangements and getting familiar with the steps and procedures, their responsibility mostly lies in working with **part two, Canvas** and **part three**, **Programme and Content development**. However, it is recommended that the NA staff have an active role in the programme and content development, depending on their competences and previous experiences. The steps and procedures indicated in that part are mostly meant to support trainers in developing staff training most comprehensively and efficiently.

While the parts of this document and specific segments that fall under them are arranged logically with concrete steps, the path to be followed throughout its pages is not set in stone. Once the contents seem familiar enough, it is also possible to go back and forth and go back to certain steps or tasks, depending on the process and the team's rhythm.

Finally, other documents are related to this one, and they are often referenced throughout the text. While some of their contents are included in this document as well, most still need to be explored by following the links to get a clear and complete picture of developing staff training.

1. Practical and financial arrangements

The following segment deals with the foundations of staff training, as a first step, before diving into the concrete programme and content development.

Objectives, roles, and responsibilities

Objectives and learning outcomes.

As first step, it is essential to **clarify the intentions and objectives of the staff training**. Practically, this means that a description of each staff training, with the main contents, intentions, and objectives, needs to be revised and elaborated on a regular basis, reflecting the current context (policy and developments in the field) and concrete developmental needs for each of the roles. The notion of "intentions" here allows more flexibility when designing the process and the flow.

In line with the intentions and objectives, describe the **expected outcomes** (what are the desirable achievements at the end of the training). If possible, describe the outcomes using the language of competence development-related processes. What can be a helpful starting point is using a **matrix that has 3-5 key competences** from which you can extract the learning outcomes. These 3-5 competences can be extracted from the regular KMST Survey, where the NA colleagues express competence needs for each of the staff training for a period of approximately 18 months. As an alternative, it is, of course, possible to check with the participants of the given staff training what are the 3 to 5 competences they wish to focus on out of the 15 of the KMST competence framework (link to the version without levels).

Prep team

The next step is to provide **a descriptive overview of the roles and responsibilities of the preparatory team** (based on the KMST Strategy). It is important to understand what the involvement of each prep team member entails and, as much as possible, what would be their concrete tasks.

This also includes a short overview of the **roles and responsibilities of the KMST contact person** (or a KMST Working Group, where applicable). Here is a list (though not exclusive) of **possible roles and tasks**:

- Inform the KMST WG about the final dates as soon as they are fixed so that they can be adjusted in the calendar.
- When setting up the team, keep in mind to keep the team members to a reasonable and 'workable' size (how many persons maximum).
- Clarify who sends the invitation for the training to the Heads of NAs (who then share it with the relevant colleagues). This should ideally be done by the host NA – Head or the responsible person for the staff training.
- Decide who invites COM (same as the above). Be clear with the COM colleague(s) if they are expected to be there for the whole duration or for (a) specific session(s), as some issues might need to be tackled within the group of NA staff only. Be aware that COM staff do have limited travel possibilities and that many inputs will have to be organised online.
- Be available to answer questions about the procedures, quality guidelines, etc.
- Clarify what information you will (and the KMST WG) get back from the training (e.g., evaluation/report/recommendations…).
- Clarify who needs to be kept in the loop of the communication (e.g., in CC) and what for.
- Make sure that there is a space for the KMST Competence Framework, as well as concrete competences tackled in training. In the evaluation template, add a

segment about the Competence Framework, add a new tab about competence assessment and, ideally, make sure the evaluation form tackles the competences being assessed or tackled.

Trainers/external facilitators must be considered when dealing with the composition of the prep team. Generally, one or two trainers/facilitators should be contracted and the following needs to be considered in this process:

- Describe their roles and responsibilities as concretely as possible.
- Describe what is expected/needed in terms of content development, process facilitation and administrative tasks.
- Provide information about whom the trainers/facilitators respond to.
- Share information about the recommended fee and contractual procedure (ref. to TCA/NET recommendations 'Working with Trainers').

Finally, though not necessarily involved in the work of the prep team, it is important to have clear information about the **involvement and the role of COM**.

Logistical and budgetary items to consider

Cheat sheet: a staff training in numbers

Note: the following numbers are meant as an orientation and, if needed, they can be reconsidered based on a specific staff training situation.

- The average **duration of training**: 2,5 - 3 (max) working days if in-person. Make sure to provide a description of what to consider and specify how to approach the duration in case of online staff training (since some training are, in fact, meetings). Staff training should not include travel days during weekends.
- The average **number of participants**: from 24 to max. 30 participants.
- **Number of trainers/external facilitators**: one or two trainers/facilitators.
- **Average participation fee**: €800-1.000 per person, including staff training, hotel, and catering. Attention needs to be put that in specific cases (such as the COVID pandemic, for example), accommodation in single rooms and bigger plenaries impacts the costs. More information about the budget calculation can be found under "budget calculation".

Setting dates for the training

a) When setting the dates, check the KMST calendar, be clear about the estimated period and make sure not to overlap with another staff training or relevant activity.

b) Take the Programmes' deadlines and public holidays into consideration.

c) Always check with KMST WG before finalising the date.

Choosing the venue

- **Recommendations with respect to the venue**: sustainable (green/eco-friendly) venues, daylight in the plenary, a calm environment that supports learning, and space for informal exchanges between colleagues, among others.
- **Accommodation**: if possible, in single rooms (especially during COVID pandemic or similar challenges). In specific cases (e.g., the Newcomer Staff Training), shared rooms are possible, due to the nature of the training and possible venues that reflect youth work reality. In addition, other staff training can also opt for shared rooms, in which case the need for single rooms can be addressed in the application form.

Specific note on COVID-19 (if applicable) and related travel

- Remind to always apply the formal rules of the home country.
- Be explicit about what is needed for international travel (e.g., extra documents, testing).
- Be explicit and clear about the cancellation rules for hotel/location.
- Be informed about what to do with possible costs if participants cancel short before meeting.
- Provide guidelines about how to develop a COVID-19 protocol for during training (incl. what to do if someone tests positive).
- Discuss the protocol with trainers.

Budget calculation

The **costs usually include** everything connected to renting the meeting rooms, the accommodation and food, the material, possible dinner out or visits, and the fee of the facilitator(s). In some cases, the calculation of costs also includes the preparatory meeting costs, although some NAs decide to cover this with their budget.

The budget should be the **basis to calculate the participation fee** per person.

The **invitation should be clear about**:

- The participation fee per person.
- The invoicing procedure (how will the costs be invoiced, when and what are the related requirements).
- The cancellation policy: the invitation should underline that if a cancellation occur after the registration and the possibility for the organisers to cancel rooms or reshuffle the sharing of the fixed costs (e.g. fees of the facilitator), the participation fee will still be invoiced.

- The reminder that staff training costs cannot be paid from TCA/NET budget but from the management fee.

Preparation of the tasks and documents to send out in advance

Documents to take into consideration. When preparing, consider the reports and evaluation of the former editions (to be compiled in respective training' packages[1] - accessible through the KMST WG/contact persons). Those can help indicate the focus of the current staff training and capitalise and build on past outcomes and achievements.

Needs/expectations from the participants. To prepare the staff training, it is important to collect:

- The needs and expectations of the participants at the time of the registration and before the programme and methods are fully defined.
- The experiences of the participants (with the KA/area of the staff training. This can include stating their role, how long they are in their NA and working on that KA/area.
- To collect this information, it is recommended to use the as basis and guidance the XLS template. NAs and trainers usually have a form builder that they use (e.g., Typeform, Survey Monkey, Google Form), but access to SALTO forms is always possible

Competences to tackle. Once the list of participants is clear - or, if time doesn't allow, at the time of the registration - it helps to collect what are the competences that need to be tackled in the staff training based on the KMST Competence Framework. This can be done through a survey or a Mentimeter.

For more information, also refer to the **KMST Competence Framework Manual**. The Manual is developed to support the implementation of the KMST Competence Framework for the competence-based development of NA staff. The Manual includes clear steps in using the framework when preparing and implementing staff training and an explanation of the different tools that have been developed so far to put it into practice. It is recommended to read the Manual (particularly its last part dedicated to explaining the KMST Competence Framework process for trainers), as it supports the development of the programme and contents rooted in a competence-based approach and provides more details for the steps outlined in the Canvas.

Preparing the invitation. In the invitation, include recommendations with respect to:

- When to send the "**Save the Date**".
- When to send the **registration**.

[1] 'Support packages' per staff training can include these guidelines, older reports, the Competence Framework, the Canva, the call, evaluation, and reporting templates. We can create these 'folders' on the intranet of the SALTO website for now (or on HOP) and on the storage of the Cooperation Platform later.

- Mentioning the **expected costs in the registration/invitation**.
- Be clear about the **invoicing procedure and the cancellation policy**.

Registration for the training. Not to forget in the registration form:

- GDPR questions.
- food/allergies.
- Arrival and departure dates and times.
- *COVID regulations, if needed.*

***Content development*.** For content development, refer to the second part of the document - Canvas and Programme and Content Development.

Evaluation, reporting and recognition of learning

Evaluation. The KMST evaluation template recommends a series of questions for the evaluation process. Ideally, the evaluation should be done on the spot (to make sure to collect as much feedback as possible) and be rather short. Of course, an online evaluation form shared later is also possible and, in some cases, even needed, especially if this is the first edition of the staff training and significant feedback is needed for the following ones.

Reporting. The KMST report template suggests a series of points to report, though this can, of course, be adjusted to the staff training. The reports of KMST activities are mostly internal and can therefore be elaborated by the trainers/facilitators.

Youthpass. Staff training is a learning space. Even though Youthpass are not necessarily aimed at staff of NAs, we warmly recommend following the Youthpass process /reflection process and connecting it to the learning outcomes and the competence-based approach. Support information is available in the annexe. It has been developed by the team in charge of Youthpass in SALTO T&C and includes information about how to approach Youthpass per se (not only the learning process). It focuses on training, where there is a clear learning process planned.

2. The Training Canvas

The Training Canvas (the Canvas) is meant to support the process of comprehensive programme development for staff training. The Canvas consists of several fields that correspond to the 'ingredients' of quality staff training. They are meant to be used as guiding elements and topics to reflect on and not as tick boxes that need to be fulfilled. The Canvas encompasses most of the elements that are further developed under the Programme and Content section. It should serve as a visual aid to support the thinking process. Hence, the Canvas is not a must, and it should only be used if it serves the purpose. In addition, a single path that goes through the different elements does not exist, but it should be adjusted to the specific context and the team in charge of a staff training: some steps might be redundant, or a particular logic might be more suitable than the other.

At the same time, a few recommendations might be useful when approaching the development of the training:

- Starting from Needs assessment, going through the first column (i.e., exploring the transversal topics and processes) and then moving to the Intentions and objectives and Learning outcomes before developing the Matrix of chosen sessions and competences and Methodology, Logistics, Roles and Resources and Evaluation for the end.
- Once again, starting from Needs assessment, but this time moving immediately to the Intentions/objectives and Learning outcomes, developing the Matrix and Methodology, and then checking back to Relevant documents, Strategic level and Quality development.

Whichever path is chosen, there will undoubtedly be quite some interactions before reaching the outcome.

Finally, it is highly recommended to work on the Canvas while having KMST Manual (final part: KMST Competence Framework process for trainers) open for consultation, as several elements are elaborated in more detail in the Manual, while here they are only referred to.

Needs assessment

Learning needs (and, more specifically, needs for competence development, if possible) should be extracted from a survey sent out to the participants before the start of the course. In addition, in case a periodical survey on the level of the network is available, needs and competences could be found there as well.
What are the needs/expectations from the participants?
What are 3-5 top competences indicated by the staff?
Are there any patterns that inform our focus?

Intentions / objectives of the staff training

What are the intentions/objectives of the training?
Do they correspond to the current context (policy context and practice context in the field)?
To which extent are they in line with the needs/expectations of the participants?
How do relevant documents, strategies and focus on quality inform the intentions/objectives?

Learning outcomes

Based on the objectives and the key 3-5 competences (from the survey or needs analysis done with the participants), what are the learning outcomes/intentions of the training?

Relevant documents

What are the key insights from the reports and evaluations of former staff training?
What are the relevant indications from the Programme Guide?
What to take into consideration from the policy documents?
What could be used from relevant RAY studies?

Matrix of chosen competences/sessions

What are the <u>key sessions</u> of the staff training (based on the intentions/ objectives, previous editions, strategies, and quality developments)?
What are the <u>key 3-5 competences</u> (from the survey or needs analysis done with the participants)?
To be indicated in the respective columns/rows to see which competence can be addressed through which session (not necessarily explicitly as a competence, but through a specific methodology that links the session and the competence).
<u>Next step</u>: seeing which are behavioural indicators (from each of the key competences) that need to be tackled
Are there some competences/indicators that need to be addressed explicitly?
Should certain sessions(s) be built around competences/indicators themselves?

	Session	Session	Session	Session	Session	Session	Session	Session
Competence 1								
Competence 2								
Competence 3								
Competence 4								
Competence 5								

Logistics

Is the chosen venue (accommodation and environment around it) a suitable space for a calm and encouraging learning process?
Is there enough daylight in the working room(s)?
Are there (additional) spaces for informal exchanges?
To which extent is the venue sustainable/friendly?
Are the venue and other practical arrangements accessible to everyone?
Please note: only consider what is possible from the contract side and adjust the criteria to your reality.

Strategic level

Which Programme priority(ies) are relevant for the training?
How will we tackle the strategic level (and strategy development) through the training?
Which transversal strategies can and should we address through the training?

Roles and resources

What are the resources that already exist in the team?
Can members of the prep team cover all the needed inputs? Is there a need for additional input? (e.g., COM, Head of the Agency, NA colleague, external expert)
Is there another role that is needed? (e.g., rapporteur, graphic facilitator, logistic person)

Quality development

How to introduce and/or encourage discussions on the quality of projects and the exchange of experiences?
How to explore what is needed to increase the quality of projects and a more tailored supportive approach?

Methodology

Do we have different aspects of the methodology explicit in the training: key principles, peer learning approach, competence-based approach, staff training)?
To which extent have we integrated the Youthpass process (reflection process into the training?
Are there any topics emerging from the survey that are not in the programme of the training? How will we tackle them?
How will we create fluid spaces and time for colleagues to exchange informally and for new topics to emerge?
How can we encourage reflection on the concrete next steps after the training/transfer to officers' work?

Evaluation

Have you considered the following aspects (please refer to the template):

- objectives/intentions of the course
- expectations and needs of the participants
- practical dimension (logistics and organisation)
- methodology/flow of the programme and the activities
- connection to the KMST Competence framework and competence development
- recommendations for the next editions

Please note: ensure that the feedback provided will be followed up on.

3. Programme and Content Development

Input for training and documents to use/refer to

The following materials and documents (can) provide relevant input for the design of the training programme and the content development:

- Reports and evaluations of former staff training, especially parts connected to competence development, content, and programme flow.
- Survey that focuses on participants' needs and 3 to 5 key competences to be tackled.
- The EU Programmes Guides.
- Relevant policy documents: a possible 'staff training package' for each staff training could include: the European Youth Strategy, the European Youth Work Agenda, recent Council Conclusions, the Council of Europe 2020 Agenda, the thematic strategies for the thematic staff training or meeting (e.g., Inclusion and Diversity Strategy 2021-2027, Youthpass Strategy, Youth Participation Strategy, European Training Strategy (ETS)).
- Relevant/connected RAY studies.
- The KMST Competence Framework (version without levels) in case there is a need and/or an opportunity to deal with competence-based development in a more holistic way (and not only focusing on the key 3-5 competences).
- The XLXS Self-assessment tools connected to the Competence Framework, for pre and/or during and/or post-assessment of overall or targeted competences.

Methodology and support to learning

This is an important part to consider, both when designing the programme and when introducing the training to the participants.

Having that in mind:

- Be explicit about the chosen approach; methodology, principles, peer learning process, the focus of the staff training, and competence-based development.
- Be conscious about the use of Youthpass, both to support the learning process of the staff in the given staff training, and how to approach Youthpass as a tool in mobilities/activities.

Components of key actions related staff training

Strategy

Make sure that you always include a session on strategy development. Possible topics could be:

- Support a reflection on the vision, impact and objectives of the specific key action targeted by the staff training or concrete programme priority/ies (in the relevant Programme Guide, and maybe the possible KA-related procedures).
- Link and support reflection on the relevant policy documents (see training packages).
- Link to RAY research, if applicable.
- Tackle at least one programme priority.
- Keep transversal strategies in mind. Some specific staff training still addresses elements that can be found in other thematic strategies (Youthpass, Inclusion and Diversity, Youth Participation). The European Training Strategy is supposed to be addressed transversally in all staff training, where relevant.
- Invite external expertise/inspiration to reflect on the content from the strategic point of view.

Profile of an NA officer and the relation with competence development

A competence-based approach, outlined in detail in the KMST Competence Framework, (version without levels) can support programme and content development by narrowing down the focus to key competences relevant for the role and/or specific priority targeted by the staff training. In addition, it places competence development in the core and hopefully supports pre- and post-reflection and learning by the NA officers. More concretely:

- Describe, based on the Competence Framework, the profile of an NA officer (with competences and concrete behaviours needed for the role).
- Based on the survey, list 3 to 5 key competences (from the 15 in the Competence Framework) to tackle in the coming period (usually 18 months).
- Foresee use of an individual self-assessment process prior to the start of the staff training (using the self-assessment forms and/or tools developed for that purpose). The self-assessment is based on the behavioural indicators and can focus only on the 3-5 competence expressed for the staff training or on all 15. The team of trainers should support participants with proper guidance and have competence development as one of the red lines in the programme.
- Follow the steps indicated in the last part of the KMST Manual: KMST Competence Framework process for trainers.

Quality development

Quality implementation of the Programme(s), as well as quality of the projects in, should be one of the pillars of each of the staff trainings. Regardless of whether they are focused on the key action or a Programme priority. Connected to that, make sure to:

- Focus on encouraging and facilitating discussions on the quality of projects and the exchange of experiences.
- Explore what is needed to increase the quality of projects and to implement a more tailored supportive approach.
- Link to the possibilities offered under TCA/NET, and the need to follow-up the European Training Calendar (public) and the Planning Board/Cooperation Platform (internal).

Operational topics/working processes (when they appear in the survey)

While the purpose of the survey is to get needs and expectations from the officers related to the objectives and content of the training, there might be some needs and topics that are more related to their day-to-day work and/or are not directly tackled by the planned secession. However, it is still possible to:

- Where relevant, organise an input on the related topic by another NA officer or director, by COM, etc.
- Support the exchange of experiences and good examples of practice within the group.
- In case several topics emerge from the survey that do not match the agenda, include an open space slot where several topics can be discussed in smaller, parallel groups. Having an agenda that allows fluid spaces and time for colleagues to exchange informally and reflect is anyway recommended.
- Provide the opportunity for colleagues to identify their next concrete steps when back to work (support liking the staff training and the transfer to their work).

Support throughout the year - knowledge management

Staff trainings are just one of the ways to learn in the network and ensuring that there is a support for learning and development throughout the year is an important part of the work of the KMST. Staff trainings can help initiate some of these process by:

- Ensuring space in the programme for planning networking/informal exchange/job shadowing for the next year and opportunities for officers to find each other. The key question here is: how to make lines shorter within your group of project officers making use of existing platforms and other possibilities?
- Connected to the above and when possible: supporting a buddy system, either initiated within the group of the staff training or with other colleagues in the participant’s NA.

Evaluation

Evaluation is an essential part of any training activity but given that staff trainings are often organised on the same topic or with the same focus one year after another, insights they generate are crucial for planning the next edition. Evaluation of the staff training should, therefore:

- Mostly aim at exploring whether the objectives/intentions were reached or tackled.
- Serve the follow-up and the design of the next editions.
- Serve for the hosting NA to assess the practical dimension (e.g., the venue).
- Include standard evaluation questions, to better monitor the development of the staff trainings and the connection with the implementation of the KMST Competence Framework (also part of the ETS monitoring and evaluation).

ANNEX - How to work with Youthpass in the context of KMST?

Youthpass is the recognition instrument developed for the projects realised within the European youth programmes. Through the Youthpass **certificate**, participation in such projects can be recognised as an educational experience, and the gained competences can be documented and made visible.

Youthpass concept foresees a **process** of reflection and self-assessment applied throughout the project. It is also a **strategy** that improves the recognition of non-formal and informal learning in Europe and supports the work of the stakeholders – including the National Agencies.

Youthpass as a process entails:

- putting and keeping learning on the agenda of the participants and the project organisers,
- supporting reflection on the experience with adequate methods and tools and in dialogue with a facilitator,
- keeping track of and recording the learning process and its outcomes,
- finding a common vocabulary to describe learning and competence development,
- including self-assessment in the certificate.

Youthpass is for ***all participants*** in Erasmus+ Youth (except the general DiscoverEU) and European Solidarity Corps, including young people and youth work practitioners as learners. The self-assessment on Youthpass is descriptive and uses the European framework of Key Competences for Lifelong Learning (for young people as learners) and European Training Strategy (ETS) Competence Model for Youth Workers to Work Internationally (for youth work practitioners as learners).

Why consider the Youthpass concept in the context of KMST?

Youthpass supports the recognition of youth work, and non-formal and informal learning across Europe. It also supports the understanding and reinforcing of the activities supported by the youth programmes as learning contexts. NA staff contributes greatly to this effort by promoting Youthpass as a quality measure in the projects they organise and help set a role model for youth workers.

NA staff who goes through reflection and even self-assessment and its documentation within the KMST framework may develop a better understanding of the dynamics of reflective learning processes and be better equipped to advise the beneficiaries of the programmes on this.

The Youthpass certificate was not designed specifically for the KMST framework and it will not be relevant for all activities or for all participants in this framework. However, for the activities that have a strong learning dimension for the participating NA staff – such as newcomer staff training – it is advisable to consider making the Youthpass certificate available for the participants who wish to receive one.

How to work with Youthpass?

NAs and/or SALTO RCs who organise the activities would care for the technical aspects of Youthpass creation workflow (such as creating a project in the Youthpass database) whereas, the trainers and facilitators who are responsible for the programme design and delivery would support the dialogue with the participants during their self-assessment. It would help to have agreements on task division in advance of the activity.

In the planning phase: During the programme design, make sure the facilitation team sets aside enough time and designs appropriate methods for reflection and documentation during the activity. The participants could also benefit from knowing how you plan to integrate these aspects to the programme in advance (such as through the info pack).

During the activity*:* Participants should have regular opportunities to reflect on the experience and their learning process, either alone or with others, and document their competence development. Dialogue with the facilitators could enrich this reflection. Individual self-assessments can be finalized after the activity as well, however, we do recommend some support already during the activity on formulating these in writing.

Follow-up: If the participants need extra time to write their self-assessment from home after attending the project, they may benefit from some support online during the writing process.

Issuing the certificates: Before the activity starts, the organisers need to create an organisation account at Youthpass.eu and enter project and activity information and add the participants.

It is possible to invite the participants to work on their Youthpass forms through the technical tool. The participants do not need user accounts for this, they can use the individual links that will be sent through the Youthpass tool.
At the end of the programme, the certificates would need to be printed out and signed by the organisers.

For further support on Youthpass:

- Explore the handbooks which include several methods and tools for different purposes to guide participants' learning journey
- Check out the Youthpass leaflets for specific actions of the programmes
- Have a look at the Youthpass videos for short insight on supporting learning with Youthpass

- Have a look at the example certificates for different types of activities
- Check the step-by-step guide for instructions on technicalities
- Make use of the demo website to try out the certificate creation workflow
- Contact the Youthpass Team at youthpass@salto-youth.net for any questions and feedback

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SALTO Training and Cooperation Resource Centre is responsible for the implementation of the Youthpass Strategy across Europe. You can contact the Youthpass Team at youthpass@salto-youth.net. Further support on Youthpass is available from Youthpass Officers in each National Agency.
