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The PERsonal facilitator: a challenge for VET

# The personal facilitator curriculum

The PERsonal facilitator: a challenge for VET  
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*ProEduca*



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# About project and partners



According to Erasmus + priorities, the project "The PERsonal facilitator: a challenge for VET" aims to contribute to the increasing labor relevance of VET (Vocational Educational Training) provision and reducing skill mismatches between the labor market and VET and outlines the opportunities that an alliance between VET learning and training agencies and labor market can offer.

PerVET project defines a new professional - the personal facilitator - a high-skilled person who, inside private companies and public bodies, empowering his/her basic, transversal and specific competences, as further described, can help both working people and companies to reach to strategic results:

1. improving the quality of working environment and the quality of services;
2. improving the quality of workers' lives (above all women in their reconciliation of work and family lives).

A new curriculum designed in this project is highly advocated to head off the emerging needs of market and people, and capable of meeting the challenges of a "non-stop changing job" framework.

The project has been designed and implemented by three organizations representing a multisectoral partnership:

1. a VET provider, Viesoji istaiga Panevezio darbo rinkos mokymo centras (Lithuania);
2. a non-profit association, ProEduca z.s. (Czech Republic);
3. and a SME, Bluebook srl (Italy),

whose history, profile and expertise ensured the complementarity of the perspectives, requirements and contribution, thus providing for the high quality of the final outcome.

As an added value, the diversity of the partner curricula let the project to strengthen the cooperation with a wide network of stakeholders and to build a strong alliance with different social, economical and political sectors.

# Introduction

The role of work has changed throughout the world due to economic conditions and social demands. Originally, work was a matter of necessity and survival. Throughout the years, the role of “work” has evolved and the composition of the workforce has changed. Today, work still is a necessity but it should be a source of personal satisfaction as well.

Even if work-life balance is, by an holistic approach, a meaningful achievement and enjoyment in everyday life, one of the vehicles to help provide attainment of personal and professional goals is work-life benefits and programs.

Reconciliation tools and policies are currently being developed on widely-experienced channels - such as part-time work, teleworking, and flexibility of times - by means of affirmative tools such as job-sharing, but leave, however, open spaces for experimentation. In these spaces is the PerVET project, which, as anticipated, explored the potential of a new figure supporting reconciliation policies and defined the study program curriculum.

The end result of the project is a survey, published in English on the project web-site and its essential parts have been translated into the languages of the partners' organizations.

In the overall document, which is the result of the survey and analysis work developed both as a selection of sources and as a collection of data from questionnaires and interviews, the subject of reconciliation has been explored both at European level and in the three partner countries. It starts from an analysis of the context from which it derives its origins: gender policies and the latest Corporate Social Responsibility and Corporate Family Responsibility policies.

The definition of the context is then followed by the results of the interviews conducted locally in the three countries to support the final elaboration of the parameters of the new proposed curriculum.

Interviews involved around 300 people, one hundred in each partner country, divided into three different target groups: employers, employees and VET providers. The results, collected and analyzed by country and also as a whole, have allowed a closer look at how the new professional figure can positively impact the people's lives and the efficiency of companies and have been used as the basis for the definition of the curriculum, understood as a regulatory document that sets up the framework needed to plan learning experiences and provide answers to them.

In this perspective, the personal facilitator's curriculum has been outlined by summarizing the tasks\*, subdivided into a sequence of three levels of complexity, and defining specifications needed to perform them: basic, specific and transversal skills.

Here the list of the tasks proposed within the survey and considered as a starting point for the curriculum definition. Basic-level tasks covers laundry services, shopping services, making reservations, picking up and delivering items, paying bills and bulletins. Intermediate-level tasks cover children transport to school, accompanying children and relatives to medical visits and checks, withdrawal/delivery documents (for example Visas for foreign travel, airline tickets, driver's license renewal, various certificates), finding out information - searching for hard-to-find items, searching offers. Advanced-level tasks would be interesting for their employers. Advanced-level tasks cover for example counseling, legal assistance and tutoring.

This document is a selection of the entire survey\*, which, we hope, you will want to explore more on the project web-site, and it presents the main result of the project: the definition of the curriculum; a result that represents the ultimate step of the project, but is at the same time a starting point.

The well-being of people, the opportunity for a job that meets their needs and the balance between working life and personal life are very contemporary themes and in this field there is some space for an extensive experimentation that can and should be explored. The challenge is open: we have collected and worked in this direction, outlining one of the many possible ways.

\*We invite you to view the full survey (in English language) on [www.pervet-erasmusplus.eu](http://www.pervet-erasmusplus.eu)



# Profile and curriculum of the new professional

## Curriculum purpose and general description

The PerVET survey results have confirmed the importance of people's increasing need for working wellbeing in three different areas (Czech Republic, Italy and Lithuania) from three different points of view: employers, employees and VET providers.

A new tool of work-life wellbeing could be a personal facilitator who can help employees in managing daily tasks and errands, relieving them from daily responsibilities and personal fulfillment, freeing up their days to do the things they enjoy, helping them in personal time management.

The survey results gave important data for curriculum of personal facilitator.

The results of the interviews and the questionnaires, submitted to the companies within the survey phase confirmed - as suggested during the preparation phase of the project - the need for tools for reconciling life time and working time and the preference of the respondents of complementary tools to traditional ones, confirming the interest in the project proposal: the potential functionality of a professional, operating within the company or as an external consultant, able to support the policies and the reconciliation tools by providing a range of services to employees. The results of the interviews and questionnaires submitted to training agencies allowed to generate data, information and suggestions for the definition of the curriculum and represent the basis on which the profile of the new professional is defined.

### The objective of the curriculum

The objective of the curriculum is to define the profile of the professional identified in his/her role of supporting existing reconciliation policies and the pathways required for his/her training, providing - through a theoretical and practical path, enriched by a work-based learning experience - a mix of basic, transversal and specific competences necessary to carry out the tasks identified as priorities for this role.

Through interviews and questionnaires, submitted within the companies, the personal facilitator's activities have been defined on three progressive levels of complexity: a basic level that collects a set of simple services - such as supporting people in shopping and spending - an intermediate level, which includes, for example, activities such as searching for online goods and services, and an advanced level which includes activities like counselling or legal support\*.

According to the results and in line with the training objectives of the VET providers, to which the curriculum is proposed, it was chosen to structure the profile by focusing on the basic and intermediate activity levels.

\*However, the listed services are not exhaustive and although adaptable to most workplaces in Europe, a preventive needs analysis at local level is recommended.

## **Professional competences**

In order to perform the identified activities adequately, to respond to the needs of people in a comprehensive and appropriate way by integrating their activities into a business environment, the personal facilitator should be able to apply:

### **a. basic competences\* in order to:**

- prepare and execute documents;
- communicate in a foreign language;
- know software diversity and function;
- work with the information on the web,

### **b. transversal competences in order to:**

- carry out the requests by employees;
- communicate properly to maintain proper psychological microclimate;
- communicate properly with the external environment (families, relatives, bank etc.);
- perform professional ethics,

### **c. specific competences in order to:**

- maintain a safe work environment;
- maintain a legal work environment;
- carry out the orders using e-shop;
- apply the legal aspects of e-shop.

\* More information on basic and transversal competences on [https://ec.europa.eu/education/initiatives/key-competences-framework-review-2017\\_en](https://ec.europa.eu/education/initiatives/key-competences-framework-review-2017_en)



## Knowledge gained by the learning

After completing the training course under the training program a person will know



- self-awareness techniques;
- team work principles;
- social and interpersonal communication principles;
- labour law elements;
- labour safety requirements;
- information and documentation procedures;
- procedures of employees's requests execution and control requirements (administration);
- information research methods (IT);
- electronic commerce principles;
- decision-making and marketing methods (management);
- stress and conflict causes and management methods.
- requirements of document preparation and formalization

## Skills gained by the learning

After completing the training course under the training program a person will be able



- to know herself/himself, to communicate with others, to work in a team;
- to work under labour law and occupational safety requirements;
- to prepare and execute the documents by conducting business requirements;
- to choose the right type of e-shop, handling of goods and service delivery, payments online;
- to find the required information on the Internet;
- to decide independently;
- to run instructions;
- to set the stress and conflict causes, to manage conflicts;
- to plan time properly.

## Curriculum content, teaching subjects

The duration of the learning process is 360 academic hours. The curriculum content is divided into theoretical and practical trainings: 196 academic hours for theoretical training, 124 academic hours for practical training and 40 additional hours for Work-Based Learning.

There are twelve teaching subjects as listed in the table below.

N.	Training subject	Dedicated hours		
		Total	Theoretical training	Practical training
<b>I.</b>	<b>Theoretical + practical training</b>	<b>320</b>	<b>196</b>	<b>124</b>
<b>1</b>	The personal facilitator's duties and professional characteristics	28	28	0
<b>2</b>	Safety and health of employees	4	4	0
<b>3</b>	Law basics	12	12	0
<b>4</b>	Professional ethics, communication psychology	60	40	20
<b>5</b>	Document management	20	8	12
<b>6</b>	Personnel management	40	20	20
<b>7</b>	Internal and external communication	8	8	0
<b>8</b>	Administration	12	8	4
<b>9</b>	Management basics	20	16	4
<b>10</b>	Foreign language	16	16	0
<b>11</b>	Information technology	60	16	44
<b>12</b>	Electronic commerce	40	20	20
<b>II.</b>	<b>Work-Based Learning</b>	<b>40</b>	<b>0</b>	<b>40</b>

Theoretical training + practical training (including 40 WBL hours)

$$360 = 196 + 164$$

## Profession activities, competences and training goals

A person who wants to get the profession of personal facilitator gains competences according to the fields of activity. All competences have their goals. The content of training subjects helps to reach those goals.

Competences	Training goals	Training subject
<b>Basic competences</b>		
To prepare and execute documents	To follow rules of document preparation	Document management
To communicate in a foreign language	To upgrade the level of foreign language (English) according to the specific requirements of the professional performances	Foreign language
To know software diversity and function	To be able to select and set up the software for one's own use at work	Information technology, document management
	To be able to enter, to process and organize text data	Information technology
	To be able to prepare documents in factsheets software, graphs display data	Information technology
To work with the information on the web	To be able to work with web documents, to communicate on the Internet, receive, view, send, manage emails	Information technology
	To be able to transfer data safely	Information technology

Competences	Training goals	Training subject
<b>Transversal competences</b>		
To carry out the requests by employees	To get acquainted with management methods, management functions and their evaluation	Personnel management
	To get acquainted with the organization's environmental assessment	
	To examine the organizational structure	
	To be able to communicate with colleagues	Professional ethics, communication psychology
	To be able to apply the prescribed ethical standards at work	Professional ethics, communication psychology, the personal facilitator's duties and professional characteristics
	To be able to organize the organization's staff assigned to the task	Internal and external communication, information technology, document management, management basics
To communicate properly to maintain proper psychological microclimate	To be able to communicate in the workplace, answer the phone, write letters	Internal and external communication, Document management
To communicate properly with the external environment	To be able to communicate in the workplace, answer the phone, write letters in a foreign language	Professional ethics, communication psychology, the personal facilitator's duties and professional characteristics, internal and external communication, foreign language
To perform professional ethics	To know the basic elements of professional ethics	Professional ethics

Competences	Training goals	Training subject
<b>Specific competences</b>		
To carry out the orders using e-shop	To be able to explain electronic commerce and its features	Electronic commerce
	To be able to pay orders in the internet banking system	
To apply the legal aspects of e-shop	To be able to recognize e-payment problems	Electronic commerce, law basics
To maintain a safe work environment	To follow rules of work safety	Safety and health of employees, Administration
To maintain a legal work environment	To follow the law governing labor relations	Law basics

## Training methods and tools

The program methodology is based on an integrated learning (theoretical knowledge is combined with practical training).

Learning methods and tools:

- lectures;
- group work;
- presentation;
- practical work;
- discussion;
- individual work.

## Required equipment for training

Equipment required for theoretical and practical training at school:

- training classroom;
- technical measures;
- internet connection;
- computer;
- projector;
- scanner;
- training material to illustrate and visualize theoretical training;
- practical tasks provided with utensils and tools;
- handouts;
- tasks sets.

VET school ensures a practical training in a real workplace: enters into a tripartite agreement with the student and the employer for 40 hours within the company.

## Achievements and assessments

Achievements and final knowledge are assessed through an evaluation taking into account:

- test results;
- interview results;
- practical work presentation results.

Theoretical training achievements are evaluated after each topic. The evaluation form consists of an interview or a test.

Practical training outcomes are assessed in every practical task assessment through the practical demonstration of competence learning.

Evaluation results are presented like this:

- satisfactory rating of theoretical training is marked “passed”, unsatisfactory rating “not passed”;
- satisfactory rating of practical training is marked “done”, unsatisfactory rating “not done”.

Final assessment task consists of:

- theoretical part (knowledge) assessment test;
- practical training report presentation and evaluation.

Skills and competences are tested and assessed during the test and practical training report.

After the theoretical knowledge and practical skills are assessed positively, educational institution issues a certificate in the established form.

## Requirements for teaching staff

Theoretical and practical training staff is required to have:

- at least a higher education in the field corresponding the taught discipline;
- at least one year of teaching experience;
- pedagogical, psychological and methodological knowledge (according to the national requirements).

## Requirements for learner

Education level required: secondary.



# Discussion and conclusions

In this chapter, we will try to answer the main question of our survey: "What is the potential for the personal facilitator on the European labour market?"

Proceeding from the results of the three surveys, among employers, employees and VET providers, the use of the personal facilitator on the European labour market appears to be more than promising.

The survey is based on the real need for the professional that could help employees with their personal duties and thus help them be more productive in their work. This need has been proven and supported by the results of the survey among the employees: more than 68% of employees would gladly accept the services of such a facilitator, the rate is even higher among employees in more difficult family situation (those who have small children or take care for relatives). This fact may be supported by one more reason: earlier the HR challenges were somehow limited to achieving maximum productivity by motivating the workforce and minimizing labor turnover. But today the employees are self-motivated: they want to deliver their best for accomplishing the work as well as personal goals. To do so, services of a personal facilitator can be very useful.

Employees are perfectly aware of the features of a well-lived life and they are also aware of the possible measures the employer can use in order to help them to achieve it.

From among all presented tools employees would welcome the flexible working hours the most. This reflects one interesting fact: the stress resulting from the balance between the work and personal life could be significantly decreased by providing the time during the day that could be used solely for the personal need of the employee. This option has been chosen by 67% of respondents.

Teleworking (working from home using various kinds of communication technology) as another one of the most desired ways to reduce the balance between the work and personal life occurs to be slightly questionable: not everybody can handle a relative „freedom“ of working outside the actual work place. While it seems to be desired by employees and all indications lead to the conclusion it must be truly beneficial, some surveys indicate otherwise. In working from home situations, it seems that private life and work life mix together, thus create an unfavorable atmosphere for productive work, as well as a difficulty to manage private life while working at the same place. Maybe the physical separateness is actually a factor that contributes to psychological separateness between work and private life, so when coming to “work” we literally “leave” our private problems at home. Although home working can have such benefits like more flexibility and independence, it can erase the thin line between work and life, making people work more beyond regular working hours. A higher level of work-related stress and working hours, the possibility of working from home and flexible working hours, along with job dissatisfaction, predict higher levels of work-life imbalance.

On the other hand, this can be an opportunity for the personal facilitator; the tasks one could need to help with might be solved much easier by the professional approach of a well-trained facilitator than by risking the stress, and the low productivity that comes with it, by not being able to handle the work from home.

Employees would welcome the help mainly with the time-consuming duties such as shopping, delivering and accompanying, and they would be willing to participate on the payment for such a service.

The need from the side of the employees is there, but is there a willingness or intention from the side of employers to provide such services?

And that was also one of the essential questions of our survey: the usefulness of having a personal facilitator inside the organization in order to provide services to the employees while it would be useful also for the company.

Employers are convinced the help of the personal facilitator could be helpful to the employees especially in focusing on the work (and thus improving the organization's performance) and reducing the work stress. They also believe the personal facilitator's services could result in some other positive effects such as improving the organization's climate, improving organization's image and reducing absenteeism.

From among various Corporate Social Responsibility areas, the employers consider the labour and employment practices as the most important. Maintaining a proper work life balance is one of the biggest challenges of 21st century HR managers. The way for them to do so could be described as follows:

- Time management: there should be proper allocation of work among the workforce so that nobody is overburdened to work over time.
- Training: there should be proper provision of various kinds of training required for a job so that the employees can enjoy their job.
- Proper staffing: correct staffing is very important.
- Proper recruitment - the right person on the right position - helps employees to deliver their best to the organization. When people enjoy what they do, it enhances their productivity.
- Use of technology: virtual environments have really facilitated working from homes. This gives them enough time for the family. The HR managers should encourage use the technology to help employees maintain work life balance.
- Assessment of employees' needs: the HR managers can develop a personal relationship with the employees by listening to not only job-related problems but also hear their personal family matters. This gives a better understanding of employees' needs and also acts as kind of counseling to them.
- Employee friendly HR policies: by drafting employee friendly HR policies like maternity leave, childcare facilities, elderly care, flexible working location and hours, provision of holidays etc. HR managers can help employees to fulfill their family responsibilities along with their job, and one of the possible way is employing/hiring a personal facilitator.



Now, knowing there is a need for the professional personal facilitator on the labour market, the very next step is to provide a quality professional education and training to the job applicants. As this vocation is brand new in the European labour environment, in the third part of our survey we addressed the providers of the vocational training and education with a set of questions helping us to design to design the curriculum of this profession. The professional answers from the training and teaching staff of the vocational schools provided the main characteristics of the personal facilitator's profile, education/training process and outcomes. The hard characteristics were confronted with the expectations of the performance features the employers might/will have towards the personal facilitator.

The curriculum as a final result of the survey is available as an open source for the VET schools interested in providing education for the future personal facilitators. The future use of the curricula should follow the individual legal procedures in the particular EU countries in order to provide the education for the public. It is evident from all the above-mentioned facts that the concept of work-life balance holds importance for an individual, organization and the society and creates a win-win situation for all the participants practicing it.

The personal facilitator and his/her services may represent just a little part of all the possibilities how to help employees to maintain their work-life balance, but its impact may be truly significant. All it takes is a company's commitment to provide this kind of services to their employees and thus benefit from their positive results. Job applicants and training organizations are ready to start.

Our deepest wish is to further exploit the results obtained in this project and to continue elaborating this idea to the European labour market's profit. Especially the cooperation with the local labour offices and big employers seems to be the most useful channel to spread the word about the new professional on the labour market. With their help the idea of implementation of the personal facilitator into the work environment in EU will reach the next, more practical level and provide the first experience and feedback from their actual work performance.

Our survey has opened many questions that need to be answered. To help this process, the project team has started preparing new projects. We will be very happy to share them with you in the following years.

