Practical know-how on change management in a company with a special view to an SME

Change management to ease workplace transitions

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## Introduction

*Change management is becoming an increasingly popular topic for SMEs due to the new challenges and risks associated with poor change management. For SMEs, the risks associated with poor change management are huge. If a company is unable to implement change, it will not be able to innovate and adapt at the right pace. In other words, organisational resilience is directly influenced by change management*. If a company, whether an SME or a large enterprise, does not adapt to market processes and new technologies, it will fail.

Technological changes can happen very quickly, affecting work processes, people's interactions and even the core activities of the business. It is therefore necessary to have a comprehensive technology strategy in place to prepare for any changes that may occur. While technological and market challenges can be prepared for, there are sudden changes that cannot. This was the case with the pandemic COVID-19 crisis, or the current energy crisis, the explosive depreciation of the currency in Hungary, inflation and the related changes in the internal market. Businesses that were flexible and ready to adapt quickly to change survived the pandemic. This can be facilitated by effective change management, which can be particularly important for resource-constrained SMEs without reserves.

## Principles

Organisational change in a company can take many forms and for many reasons. Changes in a company's work processes, structure, culture and technology can be caused by internal or external factors. Most often, a company needs to become more competitive because of other players, the emergence of new technology, external factors such as an increase in energy prices, changes in demand (decreasing or even increasing) on the domestic or external market, etc.

People are resistant to change. Managers and employees who have been with the company for a long time may not be happy to accept a new tool, technology or structure when they already know so much about the old one. In addition, structural changes also create new responsibilities which may change the balance of power and/or imply new work dynamics and a learning process. It is not certain that anyone who is happy with the status quo is willing to go through a learning process. Ultimately, if the team does not accept a proposed change, it will not produce the desired result.

We have summarised the principles that should be taken into account when designing a strategy for facilitating workplace transitions and change management:

* **Awareness -** preparing the transition to the workplacein a timely and conscious manner; developing a strategy in advance
* **Systems approach -** how the change will fit in with the remaining elements of the system, and other factors in the operation (e.g. existing regulatory environment, available human and material resources).
* **Partnership –** between the **management** and the employees (employee representatives)**.** *Partnership to deliver change management*
* consultation/partnership between consultant, owner, management, employee representatives
* ideallydefining the objectives to be achieved through organisational development/restructuring and the means to achieve them in partnership (management and employee representatives)
* **Adapting to the needs and potential of the individual** - needs assessment and individual development plan
* Mental health support for the employees. **The principle of flexicurity**.

The principle of flexicurity can be applied, whereby new forms of security are not workplace- but worker-oriented. Whether or not there is an opportunity to secure a new job or a new role within the company during the change, the strategy used is not least to help employees learn new skills/professions.

### Change management in small and medium-sized enterprises (SMEs)

How specific can it be for SMEs? Why is proper change management important for SMEs?

SMEs generally have limited resources in terms of time, money and human resources. For this reason, implementing change usually ties up a large part of these scarce resources.

They have no or very few reserves.

The changes affecting SMEs are mostly driven by pressures from the external environment rather than internal awareness. The ability to adapt quickly to the external environment (market demand, other external influences not related to the market) can mean survival for them.

SMEs tend to think and plan in the short term, which makes them both quite flexible and agile, but also more vulnerable to small changes and less able to deal with long-term developments.

SMEs are typically lost in the daily struggle, lacking strategic planning and thinking.

SME managers are often also the owners. So, change strategy and change management can depend to a large extent on their personalities and skills.

But how should SMEs proceed to implement a successful change? Experience has shown that managers need to delegate responsibility to their employees, so that they feel a certain degree of autonomy and responsibility in carrying out their tasks. That is, each employee is responsible for the change in his or her own area. SMEs should take into consideration that often the resistance against the changes by the employees or managers is a major cause for failure. Distributing the tasks and responsibilities will minimalize this resistance.

They must be proactive rather than merely reactive, reacting to a crisis, and not waiting for a crisis or problem to occur. True, to do this, they must have the right vision and values.

Also pilot testing of change, with small-scale, observable quick wins before it is extended and fully implemented, helps reduce barriers to change and increases employee participation.

It is also essential to communicate with people about change in the right quantity and quality.

It is not just how to change, but what to change. Therefore, an objective and holistic view of the organisation is the starting point for change management to decide what to change. So, the following steps may be useful for it.

## Survey. Assessment of status and needs - diagnosis

During the process of condition and (self-) assessment and diagnosis, the change planner has to determine whether the change is realistically feasible and what kind of intellectual capital and/or material resources are needed to achieve it.

* **Situation analysis**

Data collection and analysis on the current state of the company

* **Needs assessment**

Identify areas for improvement and problems to be solved.

During the needs assessment, the workers concerned should be reached individually, and their abilities, skills, potential and needs should be taken into account. (See Help Sheet 1)

* **Identification of the goals**

What is the purpose of change? What is the state we want to achieve through change?

* **Mapping the strengths and weaknesses of the organisation**

What are the available internal and external resources, potentials, and advantages that can be mobilised? (See a brief description of the commonly used SWOT analysis for this purpose in Help Sheet 7).

* **Human Resources**

Are the human resources available in their current state capable of change and adaptation, or if not, what needs to be done to make them so? (See individual and/or group development plan below)

### Strategic plans

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| A SWOT analysis is a strategic planning tool that helps to assess *internal factors* such asS (strengths): strengths on which development can be basedW (weaknesses): weaknesses, development cannot be based on them they inhibit it.And *external factors* such asO (opportunities): opportunities that can help and stimulate development from outside T (threats): external threats that may hinder the success of the development.The analysis aims to identify the key internal and external factors and capacities. Although the analysis does not draw attention to what are the strategically important issues or offer answers on how to develop your strategy, it does help to identify the strengths that underpin an effective strategy, how to exploit the opportunities available, and how to overcome or minimise weaknesses and threats. ***What is a possible method for SWOT****?[[1]](#footnote-1)*The SWOT is ideally prepared in a workshop. It takes several steps to get to the result.We should gather within a given time frame (e.g. 10-20 minutes per aspect), brainstorm at least 20-25 suggestions for each aspect. An important feature of brainstorming is that all comments are recorded, and no ideas should be rejected or discussed at this stage. At the same time, of course, participants should focus on the most important problems and phenomena. To facilitate this, the results of the documented situation report can be distributed in advance. The brainstorming should first be done on external factors (identifying trends, external processes) and classify them into "opportunities" and "threats", depending on how they are assessed.It is essential to rework the results of the brainstorming. Try to make your points as concisely and precisely as possible. Compare the points with the position paper and discuss where there is a discrepancy.During the workshop, the moderator should check whether any important issues have been missed from the description of the situation and raise them with the moderator for the discussion.During the revision process, we will reconsider with the participants whether the points have been placed under the right headings (strengths, weaknesses, opportunities, threats). For each aspect, narrow them down to the most important 6-10 points, and include in another aspects or exclude the less important points. Let's look at the table again, and if we find that it does describe the subject of the analysis clearly and concisely, we're done.**Table 6**

|  |  |  |
| --- | --- | --- |
|  | **Positive factors** | **Negative factors** |
| **Internal factors** | Strengths1.2.3.4.5.6. | Weaknesses1.2.3.4.5.6. |
| **External factors** | Opportunities1.2.3.4.5.6. | Threats1.2.3.4.5.6. |

***Strategy development based on SWOT analysis***Based on the SWOT analysis, four types of strategy can be identified: * defensive
* offensive
* change-oriented
* diversified

**Strategy creation based on SWOT**

|  |  |  |
| --- | --- | --- |
|  | Strengths1.2.3.4.5.6. | Weak points1.2.3.4.5.6. |
| Opportunities1.2.3.4.5.6. | Offensive | Change-oriented |
| Threats1.2.3.4.5.6. | Diversified | Defensive  |

**Defensive strategy**It does not necessarily have weaknesses and threats, but it has at least one of them (i.e. a weakness or a threat). It should not, however, include weaknesses that are expected to improve "on their own" - as a result of external factors or other policies.**Offensive Strategy**The offensive strategy takes stock of strengths and builds on the opportunities that help to exploit them. However, it should not be part of an offensive strategy that is likely to be eroded by external factors (threats).**A change-oriented strategy**With "change-oriented" objectives and strategies, which can be classified into the quarter of favourable external opportunities and weaknesses, changes should only be initiated based on a well-defined preference order, building on favourable external trends, after the full or partial elimination of the dominant weaknesses.**Diversified strategy**"Diversified" development is risky and requires great care. This is particularly relevant if the areas requiring an offensive strategy in the first quarter are not very numerous. |

## Planning - Preparing a change management plan

* **Well-defined points are needed**
* Timeline, schedule - with actual deadlines and milestones
* Indication of the responsible persons
* **Involving stakeholders in planning** (partnership) to help overcome resistance to change and to ensure accurate planning (stakeholders know the processes and circumstances best)
* Define strategy, set the direction for organisational development/restructuring
* Human resources development plan for those who remain in the organisation
* An outplacement plan for redundant workers
* Individual and/or group development/training plan
* Collective redundancy agreement between the trade union and the employer

**Other instruments relating to the workers[[2]](#footnote-2)**

* Job Reconstruction
* Job and competence analysis
* Worker friendly management
* Skills training, workshops
* Personality tests
* Diagnostic measurements
* Feedback on the survey
* Psychosocial support plan for both groups (both those who remain and those who will be dismissed)
* Outreach, recruitment, selection, and involvement plan
* Conducting external and internal market research activities and
* Developing the intranet
* Competency assessment - individual competency assessment which is the basis of the individual development plan.
* Preparing the individual development plan.

An individual development plan is a documentation for planning a learning and teaching process based on an individual's existing abilities and potential, which will affect the whole person. The individual development plan is not just a document, it is the whole planning process.[[3]](#footnote-3)

## Implementation. Change management

* A change management officer/working group is set up
* Involvement of employee representative(s) (trade union representatives, works council) in the working group
* Who should prepare change management plans (managers, staff, external experts)?
* Change agents - who should they be (managers, staff, external specialists, change manager?
* Involving internal - external experts (change manager)
* Designation of task implementers and appointment of responsible persons - who will operationally manage the transformation, who will be authorised to take operational decisions in the light of the transformation plan, and who will always be available. (Pitfall: The adviser is available in principle but does not take operational measures, only encourages the manager, the manager is no longer entitled to take major decisions or has already resigned. The smooth operation must also be ensured in the event of a change of manager.)
* Motivating change both towards managers and subordinates
* Managing conflict situations (resulting from staff changes)
* Managing conflict situations arising from changes in work, assignments, etc…
* Dealing with periodic, initial difficulties and problems arising from changes in the location of departments (relocations)

### Assess the financial needs for change and identify possible sources of finance

Driving change in a way that causes as little pain as possible to those involved and those who are personally (negatively) affected requires financial resources. The first step is to assess the (additional) resource needs and then look around to see where (from which level, which fund, which tender) help could be found.

## Downsizing - the outplacement

Outplacement programmes aim to

* help the jobseeker deal with the psychological consequences of redundancy,
* restore shaken self-confidence,
* help the worker who loses his job develop a realistic picture of himself, assess his strengths and weaknesses,
* increase your willingness, flexibility and mobility to change
* define new goals
* keep up their job-seeking activity
* develop a job search strategy. This includes learning practical skills, and writing a CV and a cover letter.

### 6. Downsizing. Comprehensive information for workers and unions well in advance of the cuts[[4]](#footnote-4).

Continuous communication with employees is vital for success. The reasons for the change, how it will be implemented and the impact of the change must be explained to employees and managers.

Employees affected by redundancies should be given a reasonable amount of time to prepare, so they should be made aware of the change and the likelihood of redundancies well before the process starts. This is particularly important and makes the process easier when a large number of workers need help at the same time.

The period between the decision to make redundancies and their implementation is the most difficult for those affected. *Providing early, honest and comprehensive information* to workers and trade unions and other stakeholders is very important to reduce tensions.

In particular, employees must be properly informed, i.e. in sufficient detail, about their options and the services provided by the company in advance of the redundancy.

Consultations with employees should usually include the economic situation of the company, the prospects for the workplace, and significant changes in the work organisation.

|  |
| --- |
| *Directive 2002/14/EC of the European Parliament and of the Council of* 11 March 2002 establishing a general framework for informing and consulting employees in the European Community (also) provides that information and consultation shall cover the following areas:(a) information on the current and expected development of the activity and economic situation of the undertaking or establishment;(b) information and consultation on the current situation, structure and foreseeable development of employment in the undertaking or establishment, any foreseeable measures envisaged, in particular where employment is threatened;c) Information and consultation on decisions likely to lead to substantial changes in the organisation of work or contractual relations. |

## Agreement between the employer and the workers' representatives on the transition

Before signing an *agreement* between the employer and the workers' representatives on the *transition*, the employer is advised to consider the following issues:

* How much will it cost? (Among other things, it is worth taking into account factors such as the number of employees concerned, the demographics of the workers concerned, current labour market conditions (labour market supply and demand characteristics), etc.
* How long do we commit? (Usually, as long as a significant number of workers are involved. In practice, this usually takes from six months to a year).
* What additional benefits will this bring to the company?
* The company will gain experience in managing the transition of the workforce, both in terms of the processes and the skills and practices of the staff managing it.
* Employees' frustrations are eased and frustration is replaced by positive activities.
* For the workers who remain, there will be no so-called survivor syndrome; they will worry less about their future.
* The company's corporate social responsibility will have a positive impact on its immediate environment (in the municipality or region).
* How will I ensure value for money in the financing?

## Services before dismissal

### Preparing a plan for the workers

The plan covers a wide range of support for the redundant workers during the transition (personal, professional, financial advice, job search, etc.). The related *service* aims at the *complexity* and supports several shorter and longer-term goals, such as:

* looking for a job, finding a job in another company,
* becoming self-employed (private entrepreneurs),
* programme,
* Early or normal retirement.

### Typical services before dismissal

* to assess eligibility and generate interest in active labour market programmes, retirement options (early retirement) or temporary financial assistance (unemployment benefit, job-seekers allowance);
* assessing the skills of staff and their potential for skills development and the support they need;
* counselling - diagnosis, problem-solving
* Job-search advice and placement services.

### The counselling process - a guide to set up the diagnosis

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| In the counselling process, we separate the diagnosis and problem-solving phases.Situation analysis sheet for diagnosis

|  |  |  |
| --- | --- | --- |
| Financial difficulties | 1 2 3 4 5 6 7 | Material well-being |
| Uncertainty | 1 2 3 4 5 6 7 | Security |
| Too much free time | 1 2 3 4 5 6 7 | Structuring time correctly |
| Reduction in contacts | 1 2 3 4 5 6 7 | Keeping in touch |
| Fatigue, tiredness | 1 2 3 4 5 6 7 | Lots of energy |
| Blaming yourself | 1 2 3 4 5 6 7 | Exonerate yourself |
| Low self-esteem | 1 2 3 4 5 6 7 | High self-esteem |
| A pessimistic vision of the future | 1 2 3 4 5 6 7 | An optimistic vision of the future |
| Impatient about the present situation | 1 2 3 4 5 6 7 | Patient about the present situation |
| No vision for the future | 1 2 3 4 5 6 7 | Having plans for the future |

To make a diagnosis, you need to choose on a scale of 1 to 7 what you feel is the most unfavourable and the most favourable situation for a given question. **SITUATION ANALYSIS**

|  |  |
| --- | --- |
| Description of the present situation | Description of what we would like to reach |
|   |   |

**SITUATION TO BE ACHIEVED**

|  |  |
| --- | --- |
| What can they achieve alone? | What do they need help with? |
|   |   |

 |

#### Job search advice

Contacting local employers where possible

Regular/daily updates of vacancies on notice boards

Compile a small library of job search help materials, newspapers, articles, etc.

#### Skills development - for job search

Job search skills - local training and information

CV writing assistance - in-person or a group consultation

Description of unemployment benefits

Home finances, support for managing household finances

Information on the local labour market

Description of training opportunities

How to become self-employed/self-employed

Stress management

Vocational training advice

Training, skills development

Developing basic skills

Completion of primary or secondary education

Retraining

Acquiring computer skills, etc.

Current professions

#### Interest survey - demand for workshops[[5]](#footnote-5)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|

|  |
| --- |
| **Personal data:**Name:*Contact*Address:Phone:e-mail address |
| **Questions** | **yes** | **no** | **Which workshop are you interested in?** | **yes** | **no** |
| 1. Do you have a CV? |  |  | 11 CV writing |  |  |
| 2. Can you get a job now? |  |  | 12 Practicing the job interview |  |  |
| 3. Have you completed secondary education? |  |  | 13 Track planning |  |  |
| 4. Do you have other qualifications? |  |  | 14 Job search and labour market information |  |  |
| 5. Do you have a profession? If yes, please name it! |  |  | 15 Short training to be able to finish school (primary/secondary school) |  |  |
| 6. Have you thought about further education or retraining? |  |  | 16 Improving basic skills (reading, writing, maths)  |  |  |
| 7. Would you like to participate in counselling? (job search or personal counselling) |  |  | 17. Post-secondary courses, university, college |  |  |
| 8. Do you have a computer with internet access? |  |  | 18. Other, professionals, namely: |  |  |
| 9. What languages do you speak? |  |  | 19. Basic, computer-based |  |  |
| 10. Any other suggestions, or other workshop proposals? |  |  | 20. Advanced, computer-based |  |  |
|  | 21. Workshop on training opportunities and grants |  |  |
| 22. Entrepreneurship workshop |  |  |
| 23 Workshop on information on job search benefits |  |  |
| 24. Personal Finances |  |  |
| 25 Well-being, coping with stress |  |  |

Note: information is kept confidential.*Evaluation*

|  |  |  |
| --- | --- | --- |
|  | yes responses, number of persons | yes responses, %  |
| Number of workers to be queried |  |  |
| The number of people already surveyed |  |  |
| Number of workers still to be reached |  |  |
| **General expectations** |  |  |
| CV |  |  |
| Already have a (new) job |  |  |
| Interested in retraining |  |  |
| Have secondary education |  |  |
| Good computer skills |  |  |
| (foreign-language) |  |  |
| Have a profession |  |  |
| You need help now |  |  |
| **Workshops - which workshop would you like to attend?** |  |  |
| CV |  |  |
| Job interview training |  |  |
| Track planning |  |  |
| Support for the completion of primary/secondary education |  |  |
| Computer management basic  |  |  |
| Advanced Computer Management |  |  |
| Starting your own business |  |  |
| Information on submitting an invoice: |  |  |
| Stress management |  |  |
| Family advice |  |  |
| Other, e.g. knowledge about retirement |  |  |
| Other ideas, suggestions |  |  |

 |

## Coping with change on the part of the worker

Recommendations and materials on change management are usually prepared from the employer's, entrepreneur's and management's points of view. But coping with change also applies to the employee. The worker may decide to look for another job, retrain or further his/her education, or become an entrepreneur. First, however, he has to deal with the psychological burden of unemployment, even if it is not unexpected.

|  |
| --- |
| * Coping with the loss of a job
* Developing an individual action plan
* Assessing your skills and abilities
* Developing a strong CV and cover letter
* Preparing for and attending job interviews
 |

### Coping with the loss of a job

|  |
| --- |
| 1. First shock, denial and anger 2. Fear and panic, self-blame, depression and struggle 3. Accepting the situation and looking for a job4. Coping with the situation 5. Find a new job |

Losing a job is an emotional, physical (with negative effects on physical health) and financial burden.

The role of the workplace and the action centre described earlier is, among other things, to make the worker aware that he or she is not alone, that it is not just happening to him or her and that there is someone to help him or her cope.

### Developing an individual action plan

#### The assessment of the situation

It would help to clarify the situation if the worker concerned answers the following questions, either for themselves or for anyone else who wants to help.

|  |
| --- |
| Nature of employment:* Your immediate, short-term goals?
* Long-term goals?
 |

Are the following tools available?

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| Is a self-assessment or an assessment with a counsellor available to you of the careers that match your interests, abilities and skills and the careers you could pursue?Do you have research on current labour market trends?Do you have research on the current situation of the mining industry and the related labour market?Do you have a list of occupations to be considered in your case?Are there any resources available where you can get information about these occupations and the relevant jobs, or what links are available to access these jobs (e.g. action centres, job centres, internet searches, trade magazines, job fairs, etc.)?Is there any research or brochures that describe the training required for these occupations? |  |  |

|  |  |  |
| --- | --- | --- |
| Job search skills and tools | Yes | No |
| Do you have a job search "wish list"?Do you have a list of potential employers?Do you have a weekly or monthly job search diary?Do you know how to contact employers?The admission rules are set out in the Admission Regulations.Do you have a list of educational institutions offering courses that apply to you? |  |  |

|  |  |  |
| --- | --- | --- |
| CV - what is your CV like? (If available) | Yes | No |
| Does it contain up-to-date information?Is it in the right format?Do you know how to submit and upload your CV electronically? |  |  |

|  |  |  |
| --- | --- | --- |
| Motivation letter - what is your motivation letter like? (If available) | Yes | No |
| Is your information up to date?Do they reflect your goals for the job? |  |  |

|  |  |  |
| --- | --- | --- |
| Job search and the tools available  | Yes | No |
| Closing provisions* computer?
* Internet?
* e-mail address
 |  |  |

|  |  |  |
| --- | --- | --- |
| What do I need to know for the job interview? | Yes | No |
| Have you compiled a list of the qualifications you have obtained?Have you found out what questions are usually asked?Have you practised answering the questions? Have you done a trial interview?Do you know anything in advance about the type of interview? Do you know who you will be in contact with?Do you know any techniques to reduce nervousness and anxiety?Do you have the right clothes for the interview? |  |  |

|  |  |  |
| --- | --- | --- |
| Training, education  | Yes | No |
| Are you aware of the following?What training institutions do you have access to (adult education programmes, apprenticeships, higher education, other vocational training institutions)?Do you know what the admission requirements are for your chosen institution and what the admission process is?Do you know the details of any training programmes/courses?Is it possible to learn outside the classroom?How much does the training cost?What kind of financial support (local, corporate, labour, etc.) can you count on? |  |  |

#### Preparing an action plan

Considering the results of the previous assessment, the following table can be completed.

My goals

|  |  |
| --- | --- |
| My goals | Listing |
| Short-term goals (1 year) |  |
| Medium-term objectives (3 years) |  |
| Long-term goals (5 years) |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Steps/tasks** | **Expected results** | **What support is needed** | **Starting date/ planned ending date** |
| Short-term goals (1 year) |  |  |  |  |
| Medium-term objectives (3 years) |  |  |  |  |
| Long-term goals (5 years) |  |  |  |  |
| Prepare a CV and cover letter (motivation) |  |  |  |  |
| Learn how to look for a job |  |  |  |  |
| Enrol in the training course of your choice that matches your objectives |  |  |  |  |

## Annexe

### Job transition - needs assessment - questionnaire

1. **General expectations**

Your answers will help us to identify what help and support you and your colleagues need to change jobs/jobs. The questionnaire is anonymous, all information will be treated confidentially!

1. Interview serial number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Date of interview: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. How many years have you worked for the company: \_\_\_\_\_\_\_\_
4. Current position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Do you have dependents? \_\_\_\_\_\_\_
6. How many people depend on you? \_\_\_\_\_\_\_
7. Highest level of education? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
8. Your qualification(s)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of obtaining them\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**B. To help you with the transition, we ask you a few questions**

**about your plans.**

1. Have you heard about the company's modernisation programme? Yes No

*[Here you can briefly describe the company's modernisation programme and its plans to keep its current workforce]*

1. Are you committed to continue working for the company? Yes No
2. In specialist postgraduate programmes, Yes No
3. Are you willing to retrain? Yes No
*[If the answer is "no", go to question 18]*
4. Can you accept working in a different job with different colleagues? Yes No
5. How would you like to achieve this training?
6. At work (in my new job)
7. At work, but without a study contract or commitment (I will find a new job on my own)
8. In a training institution (vocational school, adult education)
9. OTHER: ………………………………………………………………
10. What concerns do you have about continuing training? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
11. What can the company do to help you accept the changes? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
12. Are you willing to spend your free time on further training and retraining? Yes No
13. If you do not accept a job offer from the company:
14. Looking for another job? Yes No
15. Starting your own business? Yes No
16. Go to retirement: Yes No
17. OTHER: ………………………………………………………………
18. If you start by looking for a job straight away, are you planning
19. to look for a job like the one you have Yes No
20. to change occupation and industry Yes No
21. When looking for a job, do you plan to:
22. Look for a job in the same region but elsewhere in the region.
23. Move to another region.
24. Look for a job in another country.
25. Go anywhere you can find a job.

**C. Support to find employment**

1. Do you know how to contact employers? Yes no
2. About your CV:
3. Do you have a CV? Yes No
4. Is your CV up to date? Yes No
5. Do you know how to send and upload the CV electronically?
Yes No
6. Cover letter:
7. Do you know what a cover letter is and what it is for? Yes No
8. Have you ever written such a letter? Yes No
9. Would you like to have help in writing one? Yes No
10. On the means available: Do you have
11. a computer? Yes No
12. Internet? Yes No,
13. do you have an e-mail address? Yes No
14. Do you need help finding a job?
15. No
16. Yes, in the following:

- plan my next step (career guidance/job search)

- explore what interests me and what skills and abilities I have

- job search

- prepare my CV and interview

- boost my confidence when contacting potential employers

- training for a new occupation or profession

- cope with stress

1. If you would like us to contact you in the future, please provide your name and phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Personalized counselling

Based on the results, the interviewers give personalized advice about the next steps in changing jobs and finding job opportunities.

*Evaluation*

Based on the answers to the questions asked during the interviews, a written assessment and summary (with aggregated data) will be made. This information and the experiences will be shared with the employer.

Source: GINOP-5.3.5-18-2019-125 - Developing labour market adaptability and supporting the transition in the "B" Mining and quarrying sector. Mental health support for the employees.

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