



**WP2/D2.4**



# **DocEnt Project DOCENT TRAINING PATHS**

This product has been produced as part of the DOCENT Project.

DOCENT - DOCTors in ENTERprise is a 24 month project financed by the European Commission Lifelong Learning Programme – ERASMUS/ Multilateral projects/ Cooperation between Universities and Business.

The project aims to contribute to enhancing the employability of technical and scientific doctoral candidates through the development and testing of:

- a model for the provision of careers services specific to doctoral candidates and graduates capable of innovation and effective knowledge transfer, whether as an employee or as an entrepreneur. It also includes guidelines for integration/coordination between University functions;
- training modules to be offered within this careers services framework to support the professional development of doctoral candidates and graduates, in particular opening up opportunities beyond academia, and underpinning the development of transferable skills.

Partners in the DOCENT project include:

**Promoter**

- ASTER – Associazione Scienza e Tecnologica Emilia-Romagna, Italy

**Partners**

- Confindustria Emilia-Romagna, Italy
- Università Degi-Studi di Modena e Reggio Emilia, Italy
- COEPA – Confederacion Empresarial de la Provincia de Alicante, Spain
- Fundeun – Fundacion Empresa Universidad de Alicante, Spain
- CRAC – the career development organisation, UK
- University of Malta

**Associate partner**

- Fondazione CRUI, Italy

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## 1. BACKGROUND

The Docent Project aims to enhance employability of technical and scientific PhD students through the development, testing and exploitation of innovative training modules for the development of transferable skills not only for public research but for all areas of the labour market.

Doctoral graduates have the potential to be key actors in the creation of innovation and knowledge-based economic growth in any economy at National, European and Global level. Doctorates are most likely to contribute to the advancement and diffusion of knowledge and technologies. The modern doctorate is seen as an excellent training programme for those who go into roles in industry beyond research and education. There are numerous European and national policy drivers that support the transition of doctoral graduates into careers in a range of employment sectors other than the traditional academic in a University<sup>1</sup>.

Europe produces many more doctoral graduates than there are academic positions available. This means that there is need for Universities to ensure that PhD graduates are not only trained to develop those skills needed to work in academia, but to also develop those skills which they would need to work, research and generate knowledge as part of the innovation and development process within industry and the wider labour market.

## 2. INTRODUCTION

One of the first aims of the Docent Project was to identify the current European landscape in terms of both training in transferable skills for technical and scientific PhDs and career guidance services to support career paths for researchers outside academia.

Thanks to the survey “Transferable skills and employability for doctoral graduates: survey of the current landscape” developed in the first phase of the project the partnership has been able to identify a list of key transferable skills for doctoral candidates and graduates around which training modules have been built .

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<sup>1</sup> For further information please read the document produced by Docent “Transferable skills and employability for doctoral graduates: survey of the current landscape”, [www.docentproject.eu](http://www.docentproject.eu)



The survey has involved the completion of 40 interviews with experts belonging to the academic and business world coming from the different countries of the docent project partners, experts at European level and representatives of national or European networks in field of training, guidance, innovation and technology transfer. Besides this, the partnership has also reviewed and analyzed relevant literature and, having collated all the information coming out from these interviews and documents, has completed the survey with the production of a report, available in the three Docent partnership languages on the project website<sup>2</sup>.

The results of the survey have been used by the partnership as a starting point to identify the needs and gap in terms of training for transferable skills and in terms of career services for doctoral candidates.

Using the findings of this report as a basis the DOCENT partners agreed to develop short 'teaser' training modules, designed to widen awareness of the types of skills that public sector and private enterprise employers are looking for and to help doctoral candidates to reflect on ways to develop their own skills further.

The partnership shared a list of transferable skills that actually represent the objectives of each of the 18 different learning Units, divided into 5 training modules that we present in this report. The Learning Units are intended to introduce in a nutshell key concepts to PhD students about horizontal skills which are essential in an entrepreneurial environment where revenues come from the exploitation of the foreground generated by the research.

### 3. DOCENT PROJECT TRAINING MODULES AND THEIR LEARNING UNITS

Effective learning environments are systems that enable an audience to develop through training, the necessary competencies to perform required tasks. Creating such environments requires an understanding of the learning process so as to structure learning opportunities using appropriate methods, strategies, and tools.

The DOCENT PROJECT offers a training model based on 18 learning units grouped within 5 training modules to be implemented within a careers services framework to support the professional development of PhD students and graduates, in particular opening up opportunities beyond academia, and underpinning the development of the necessary transferable skills.

<sup>2</sup> [www.docentproject.eu](http://www.docentproject.eu)



The following includes the list of the designed 18 Learning Units (LUs) organized in 5 training modules:

TRAINING MODULE	LEARNING UNITS
<b>1. MANAGE YOUR CAREER</b>	1.1. Career management skills and employability 1.2 Recognise and promote your skills 1.3 Gaining employment
<b>2. OPPORTUNITIES OUTSIDE ACADEMIA</b>	2.1 Business culture 2.2 Commercial awareness 2.3 Knowledge of the labour market
<b>3. WORKING WITH OTHERS:</b>	3.1 Leadership 3.2 Networking 3.3 Science communication for a knowledge-based society 3.4 Conflict management
<b>4. MANAGING PROJECTS:</b>	4.1 Funding, finance and resources 4.2 Project management 4.3 Budgeting in a nutshell 4.4 Intellectual Property management
<b>5. BEYOND EMPLOYMENT</b>	5.1 Creativity 5.2 Entrepreneurship 5.3 Resilience and risk-taking 5.4 How to write a business plan

Each LU (learning unit) has been developed starting from a short definition of the skill around which it has been designed. They are organised in order to enhance the development of the range of the contents within each LU. In the following section, you can find a short definition of the aims of each Learning Units included within the 5 specific thematic areas, and which correspond to the 5 training modules:



## TRAINING MODULE 1: "MANAGE YOUR CAREER"

- **CAREER MANAGEMENT SKILLS AND EMPLOYABILITY:** This learning unit is designed to support doctoral graduates in reformulating their professional strategy aim to work in private companies so that they may know their work expectations and define their professional objectives better;
- **RECOGNISE AND PROMOTE YOUR SKILLS:** is designed to assist PhDs in understanding how they can develop employability skills to prepare them to get a job in a private company. Once PhDs are involved in a skills initiative, the most important issue is to ensure that there is room for improvement: achieving a certain assessment score in one skill, or developing and validating a new skill;
- **GAINING EMPLOYMENT:** is designed to help PhDs understand the career management process involving career exploration, development of career goals, and the use of career strategies to obtain those goals. PhDs will use information concerning their personal characteristics to define their career management strategies, their need for mentor's support for career development, and their willingness to participate in development activities.

## TRAINING MODULE 2: "WORKING OUTSIDE ACADEMIA":

- **BUSINESS CULTURE:** is designed to show the importance of detecting the personality of the enterprise and be aware that there are different kinds of business cultures (oriented to the employee, innovative, oriented to the results, oriented to the costs, oriented to the company...) These must all be known to PhDs. The ideal situation is that the "future employee" will assume the culture of the enterprise (socialization process).
- **COMMERCIAL AWARENESS:** is designed to help PhDs understand the business context and of research undertaken, and their own ability to transfer skills and knowledge into a business or industry environment; a knowledge of recent advances within one's industry or field as well as in related areas.
- **KNOWLEDGE OF THE LABOUR MARKET:** is designed to provide PhDs with a methodology for active research about the labour market, and which will help them make better decisions about their future job decision: vacancies, careers and skills demanded by private companies.

Labour market information provides valuable insight on the labour market conditions and trends in their territorial framework. Labour market information helps

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individuals determine which occupations suit their aptitudes and interests, where the jobs are, and which occupations have the best prospects. It also helps people locate the most appropriate training and educational resources.

### TRAINING MODULE 3: "WORKING WITH OTHERS":

- **LEADERSHIP:** is designed in order to explain the process of social influence in which one person can enlist the aid and support of others in the accomplishment of a common task.

The capacity of PhDs to listen and observe, to use their expertise as a starting point to encourage dialogue between all levels of decision-making, to establish processes and transparency in decision-making, to articulate their own value and clear vision without imposing their point of view.

- **NETWORKING:** is designed to show how professional networking has grown in value, methods and applications. This area examines professional networking methodologies and practices in today's global communications environment. Participants will network with each other practising and following prescriptions for networking success thinking in a multicultural environment and work culture of enterprises.
- **SCIENCE COMMUNICATION FOR A KNOWLEDGE-BASED SOCIETY:** is designed to focus on science/research communication and on the process of transferring information from one person/entity to another. Communication requires that all parties have an area of common communication and common tools to communicate and understand each other.
- **CONFLICT MANAGEMENT:** is designed in order to provide PhDs with skills, techniques and strategies used in conflict resolution as a source of career opportunities.

### TRAINING MODULE 4: "MANAGING PROJECTS":

- **FUNDING, FINANCE AND RESOURCES:** is designed, within the territorial context of the project, to enable PhDs to identify and choose the right finance using the Financial planning and accounts. It is important to know funding and grant information direct to innovative projects in each country as well as at European level;
- **PROJECT MANAGEMENT:** is designed in order to show project management methods, used "to do projects right". It explains the methodology of planning, organizing, and managing resources to bring about the successful completion of specific project goals and objectives;





- **BUDGETING IN A NUTSHELL:** is designed to convey the basic budget terminology and techniques to breakdown costs. It aims to improve PhDs' personal situation through knowing rules about financial grant application for research and business start-ups;
- **INTELLECTUAL PROPERTY MANAGEMENT (IPR):** is designed to review common types of intellectual property: copyrights, trademarks, patents, industrial design rights and trade secrets in some jurisdictions (European level, national level...) and their benefits in order to take decisions about it.

### TRAINING MODULE 5: "EDUCATION TO ENTREPRENEURSHIP"

- **CREATIVITY:** is designed to explain practical and effective techniques that will enable PhDs to think creatively "out of the box" and how to generate ideas alone or in groups, exploring the qualities and necessary practices to really generate innovation in goods and processes.
- **ENTREPRENEURSHIP:** is designed to foster the successful practice of entrepreneurial development of new businesses. It must be designed to transfer to PhDs, the skills and knowledge that they need to know before embarking on a new business venture;
- **RESILIENCE AND RISK-TAKING:** is designed to help participants to recognise the sort of risk they take and how to extend this risk-taking to further their learning and development and to adapt and recover quickly after enduring stressful, life-changing situations.
- **HOW TO WRITE A BUSINESS PLAN:** is designed to help PhDs to think as a potential investor and to teach them how to create a written outline that evaluates all aspects of the economic viability of a business venture including a description and analysis of a business prospect.

## 4. METHODOLOGY AND STRUCTURE OF LEARNING UNITS

The methodology of design of this product (the training modules) has been developed following a "building blocks" approach. It includes the development of short basic training modules including learning units, which are also usable individually and separately in order to create a range of training paths adaptable to the different needs of the beneficiaries. All the Learning Units respect common criteria on duration, contents organization, format etc.



The Learning Units also follow the same didactical methodology with the following common elements:

- **AUDIENCE:** Effective training begins with a clear understanding of the training audience and their training requirement, expressed in terms of required tasks  
Docent Project learning units are directly addressed to PhD students and PhD graduates.
- **FORMAT:** The LUs foresee participative classroom teaching and customised materials. The methodology is mainly active, practical, dynamic, encouraging participation.
- **DURATION:** 1,5 - 2 hours.
- **SUPPORT MATERIALS:** The LUs provide a “Tool Kit” composed by two kinds of materials.
  - 1) HANDBOOK
  - 2) SLIDE SHOW

#### 4.1. HANDBOOK

All learning units have the same structure. As explained above the learning unit tool kit consists of a handbook and slides.

The fundamental support tool provided by each Learning Units is the Handbook. In order to provide uniformity to the designed materials and also in order to allow sharing of the didactical model, the handbook has the following structure for each Learning Unit

- **TITLE**
- **OBJECTIVES:** this part identifies the final aims of the LU, in particular focusing on the learning outcomes in terms of the skills that participants develop by the end of the training; they briefly explain to the reader what learning is to take place, which problems are going to be solved, the benefits of the skill improvement and the framework/context;
- **REFERENCE GUIDE:** contains the bibliography on which the LU has been designed and which also provides the reader with an easy way to obtain deeper information on the contents covered;
- **OUTLINE PROGRAMME:**
  - INTRODUCTION:** provides a short resume of the contents of the whole LU, providing the reader with a general overview in relation to the topic;
  - PROGRAMME CONTENTS:** contains the contents of the LU and has been developed in a different way in each LU according to the issues identified for each training module;
  - REVIEW OF LEARNING:** Each Learning Unit contains an opportunity for the review of learning. The aim is to have feed-back from the audience or to put in practice



the learned skills. It might include a short practice or a multi-choice test with 3 alternative answers and only 1 right-answer.

**FURTHER DEVELOPMENT:** this point has been inserted in the handbook starting from the point of view that training participants should to make their own decisions (reflection-in-action) in relation to the learning; it consists of simple empty space at the end of each handbook, inserted in order to suggest to the tutor that the student is invited to develop his/her own plan or activity in which to identify what they want to change in relation to the skill/s targeted in the LU and how this is going to take place. The student should define a pathway to acquire/develop the skill in the future in a professional, work or personal context. In some learning Unit this area is already organized suggesting some point of discussion.

#### **4.1.1 ANNEX 1: SLIDES WITH NOTES ABOUT THE PROCESS OF TEACHING**

This annex to the handbook includes a description of the process of teaching. In this annex it is possible to find an explanation of each slide for the tutor/trainer, its aim and process of teaching including the timing foreseen for the development of the concepts. This part of the handbook is designed as an annex because it is intended exclusively for the tutor/trainer and acts as a guideline for delivering the LU, explaining in which way the tutor/trainer can deliver the Docent Learning Unit with the support of slides and with the appropriate timing foreseen by the methodology.

#### **4.2 SLIDES**

The slides constitute the second support tool foreseen in the LU; these are designed in order to make the material as communicative as possible, useful for tutor/instructor to review the contents of learning units, and for students to learn the key issues tackled by the LU. The reason to insert also the slide in ppt version is linked to the possibility to provide ready material in case it is used for distance learning.

### **5. HOW TO USE DOCENT TOOL KIT**

These materials are directly intended for the tutor/trainer but are designed in a way that the contents of the handbook and the slides can be freely provided to the participants as support and further reading. As already explained the annex to the handbook (**ANNEX 1: SLIDES WITH**



**NOTES ABOUT THE PROCESS OF TEACHING**) is a tool designed exclusively for the tutor/trainer and acts as guidelines for the process of teaching.

The Handbook is mainly intended as tool for the tutor/trainer but is designed also to be material that can be made available to the participants, if the tutor/trainer thinks fit and if he/she thinks it can be useful as support for the students.

There is an exception only with regards to two Learning Units within the first training Module "Manage your Career": LU 1.1. "Career management skills and employability" and LU 1.3. "Gaining Employment".

These two learning Units require the use of a facilitator and for this reason the handbook has been designed as a guide for the facilitator and in the document it is identified which parts of the handbook can be opportune to provide to the participants. For these two LUs the supporting material has been designed using the following distinctions:

**MATERIALS FOR THE TUTOR:**

- HANDBOOK: facilitator briefing
- SLIDES

**MATERIALS FOR PARTICIPANTS:**

- ADVANCE HANDOUT
- PROFESSIONAL STRATEGY HANDOUT
- ADDITIONAL LINKS AND SOURCES HANDOUT

For all other 16 LUs the tutor/trainer can freely decide how to use the handbook, providing all the material or only part of it as they think best.

## 6. LEARNING UNITS IN A NUTSHELL

All didactical materials (tool kit: handbook + slide) constituting the LUs are provided by the Docent Project in electronic version. This modality has been chosen in consideration that all material has been designed also in order to allow the use of the material through an e-learning training approach.

This document presents the key concepts included in each of the 18 Learning Units in 18 Brief Forms which demonstrate the focus of each unit in terms of:



- 1) Objectives;**
- 2) Programme outline; and**
- 3) Introduction.**



## 1.1 Learning Units

### Career management skills and employability

#### OBJECTIVES

The student after the study of the unit will be able to:

- think widely about their career possibilities;
- use new tools for assessing their own values, motivations and strengths; and
- start constructing an individual strategy to guide their approach to career choices.

#### PROGRAMME OUTLINE

1. Welcome and icebreaker;
2. Overview: introduce objectives;
3. Something to think about: a few statistics to set the scene
4. Career theory and models:
5. Planned happenstance
6. Career development model (DOTS) as a basis for the session
7. Your professional strategy: give out the handout and explain how to use it
8. Know yourself – including values and motivations, and job clips exercises
9. Know your options
10. Take action – make a decision
11. Take action – planning – including actions exercise
12. Get inspired
13. Review of Learning
14. Further development

#### INTRODUCTION

The facilitator is to aim to:

- inspire participants to consider the full range of career possibilities – within and beyond academia;

- present some models and tools to help participants to formulate a professional strategy;
- encourage participants to take responsibility for their own career development.

Slides and handouts may need to be adapted to suit local circumstances, for example one might try to include statistics or examples from the students' country, as well as local information about specific support services available to the group.

#### Handouts to be provided to course participants

These can be adapted or enhanced to suit local needs and circumstances and include:

1. Advance handout explaining job clips task - to be provided in advance either electronically or in hard copy (see appendix 1)
2. Links and sources handout – provided on the day in hard copy (see 'reference guide' above)
3. Professional strategy handout – provided on the day in hard copy (see appendix 2)

Resources needed for the session include:

- Room with unfixed chairs plus space for participants to move about;
- Slide projector;
- Flip chart and pens;
- Pen and large paper for each participant (dream day exercise) and in case some participants have not completed the advance tasks;
- a few hard copies of the advance handout; and
- a selection of job advertisements



## 1.2 Learning Units

### Recognise and promote your skills

#### OBJECTIVES

With this course the student will learn to:

- achieve a goal of self-knowledge itself;
- use techniques to help him/her identify his/her personal and professional skills;
- identify and develop own skills to get a job in a private enterprise;
- take a proactive approach to acquiring new skills demanded in the future by private enterprises.

#### PROGRAMME OUTLINE

1. Introduction;
2. Professional self-knowledge: the model of competence and Richard's Riso and Hudson's;
3. Personal self-knowledge: strengths and weaknesses;
4. Development of individual potential.  
Techniques and tools;
5. Best practices and habits to be effective in personal and professional life;
6. Review of learning;
7. Further development.

#### INTRODUCTION

Before starting their career in the labour market the PhD students and PhD graduates should be aware that there must be a process of self-analysis and self-knowledge. They must study the characteristics of their personality, identify their weaknesses, and those strengths which can differentiate them from other candidates. Similarly, they should be aware of their abilities and achievements.

They must know well all these aspects in order to offer the labour market the solutions expected from them. From this knowledge they will be able to decide on the businesses, jobs, or working conditions offered by a qualified position to which they can apply.





## 1.3 Learning Units

### Gaining employment

#### OBJECTIVES

Participants will

- be inspired to think widely about career possibilities
- gain new tools and improve awareness of how to promote themselves successfully
- identify next steps and create an action plan

#### PROGRAMME OUTLINE

- Welcome
- Overview: introduce objectives
- Why employers value doctoral graduates
  - Option 1: job clips
  - Option 2: career stories – transcripts or video
  - Option 3: what skills?
- Promoting yourself:
  - Option 1: cvs and covering letters
  - Option 2: application forms
  - Option 3: interviews
- What is in your way? – the reality check
  - Option 1: barriers
  - Option 2: barriers
- Take action – planning exercise
  - Option 1: work with a partner
  - Option 2: postcards
- Get inspired

#### INTRODUCTION

As facilitator you will

- Inspire participants to consider the full range of career possibilities – within and beyond academia
- Present some tools to help participants in gaining employment
- Encourage participants to take responsibility for their own career development

Read this facilitator briefing plus the accompanying slides with notes.

Slides and handouts may need to be adapted to suit local circumstances, for example you might try to include examples from your own country, as well as local information about

specific support services available to the group.

Note that this session requires that participants do a small amount of advance preparation (detailed on 'advance handout'). The toolkit design allows the facilitator to choose or to concentrate on certain activities based on the needs and the dynamics of the group, and to provide information on the other activities as handouts. The toolkit format allows for flexibility for you as the facilitator.

Take a conscious decision on the activities to utilise, e.g. avoid using all the self-reflection options together. Use a blend of activity types to promote discussion and feedback from others, as well as giving time to reflect. Where possible, finding out the profile of the group before the session would be helpful in choosing the most appropriate activities to include. Suggested timings have been indicated for each section but these may change depending on the activities you choose to include.

Participant handouts can be adapted/enhanced to meet local need and circumstances.



**2.1 Learning Units****Business culture****OBJECTIVES**

The general objectives of this learning unit are to show the importance for PhD students and graduates of identifying an enterprise personality and the different types of business culture (oriented to the employee, to innovation, to results, to costs, to company, etc.) promoted. The ideal aim is for a "future employee" to take on the culture of the enterprise which is part of the socialization process.

By the end of the session, participants will be able to:

- Understand the different kinds of business;
- Work with concepts regarding the identity of an enterprise.
- Seek and develop new ways of arriving at better collaborative outcomes, by thinking creatively and working cooperatively.
- Improve their personal situation by understanding the rules and objectives of the different kinds of businesses.

**PROGRAMME OUTLINE**

1. Introduction
2. Different kinds of business culture
  - a. The culture of power
  - b. The role culture
  - c. The culture of the task
  - d. The culture of the person
3. Detecting enterprise personality profile
4. Basics
5. Factors determining culture
6. Culture and the management of change
7. Review of learning
8. Further development

**INTRODUCTION**

Before starting a career outside of academia, PhD students and PhD graduates should be aware of the different kinds of companies that exist and that not every company can be good for them. They must study the characteristics of each company and decide if it matches their personality. They should identify a company's strengths to help them

differentiate between the different kinds of companies and to decide if they would be comfortable working there. They must know all these aspects and characteristics in order to explain to the company what to expect from them if recruited.

Enterprise culture is what determines the behaviour of an enterprise. It is important to identify the behaviour of a company before problems with and/or opportunities provided by management appear. Any new worker needs to adjust to the changes and requirements of exterior and interior order which are internalized by existing workers as a way of thinking, living and acting as part of the company. These basic beliefs build the enterprise culture, and are stimulated and shaped by its leadership. A definition of identity is given as that factor of adjustment and transformation focus of management which differentiates an enterprise from other companies.

Enterprise culture manifests itself in the sense of belonging and the flexible propensity to agree on common goals by its workers, and in the integral management of the company with its strategic aims and evaluation criteria to the measure results.

The language and the conceptual categories of every enterprise culture or organization are essential to define the cohesive identity of a group and to establish the types of relations between employees belonging to the same company. One of the more important factors of managerial success is the invariable adhesion of the whole social body to the above mentioned beliefs. These beliefs are set at the top and help facilitate the adjustment of the group to the external environment and the integration of its internal processes for its adequacy and survival.

The management teams and controls in their respective levels have the responsibility of introducing, reporting and fostering this culture in their groups through effective example which highlights the responsibility of applying the same concepts in their daily work.



**OBJECTIVES**

By the end of the learning unit Participants will:

- show an understanding of the business context and of research undertaken;
- recognise their own ability to transfer skills and knowledge into a business or industry environment;
- have knowledge of recent advances within one's industry or field and in related areas.

**INTRODUCTION**

Those who run a business are quick to realize that one of the most important assets of their companies is their sales team and their talent to utilise their experience and knowledge accumulated in sales.

Salespeople are the eyes and ears of the company, i.e. they are advisers of their clients by providing knowledge, dedication and a great culture of service.

**PROGRAMME OUTLINE**

1. Concept of personal promotion;
2. Characteristics of personal selling;
3. Qualities of commercial awareness;
4. Qualities for sale;
5. Types of business and sellers/service providers;
6. Strategies to create and develop business relationships;
7. Personal selling as a process.
8. Review of Learning
9. Further development



### 2.3 Learning Units

#### Knowledge of the labour market

##### OBJECTIVES

By the end of the session, participants will be able to:

- Know which negotiation techniques deal mainly with sales negotiation;
- Work with concepts concerned with collaborative negotiation;
- Seek and develop new ways of arriving at better collaborative outcomes, by thinking creatively and working in cooperation with others; and
- Improve their personal situation through knowing rules about negotiation of debts for business or personal debts.

##### PROGRAMME OUTLINE

1. Introduction
2. Negotiation: Phases and Techniques of Job Search
3. Information Sources
4. What Do Phds Offer Employers?
5. Job Shadowing And Placements
6. Academic Careers Versus Careers Outside Academia
7. How To Write An Effective Resume:
8. Secrets Of An Effective Job Seeker
9. Further Development

##### INTRODUCTION

The term 'European labour market' is used to describe the demographic profile of the

labour force as well as the systems of regulation at EU level, and is concerned primarily with the free movement of workers as well as with other forms of regulation that shape Europe's labour market.

The project of creating a European labour market is quite different from the objectives associated with national labour market regulation, where employment protection and industrial relations are the chief concerns. The aim to establish the free movement of workers provides the major context of regulation of the European labour market since the foundation of the European Economic Community in 1957. PhD graduates should consider the whole labour market before they design a career strategy to find a job.

Despite the limitations of its initial common labour market objective, EU regulation of the labour market has developed beyond that of free movement of workers. A major driving force has been the interaction of Member States, both individually and collectively, with EU institutions. The policies of Member States exert pressure on institutions, in particular on the Commission, and have been a major determinant of EC regulation of the labour market. EU regulation of the labour market has also been used specifically to shape the demographic profile of the labour market, in the form of the Lisbon strategy, the EU2020 Strategy and the strategy for growth and jobs.



#### OBJECTIVES

At the end of the session participants will be able to:

- understand the process of social influence in which one person can enlist the aid and support of others in the accomplishment of a common task;
- The capacity of PhDs to listen and observe, to use their expertise as a starting point to encourage dialogue between all levels of decision-making;
- to establish processes and transparency in decision-making; and
- to articulate their own value and clear vision without imposing their point of view.

#### PROGRAMME OUTLINE

1. Leadership. Definitions
2. Features and Types of leadership
3. Leadership styles.
  - 3.1. formal vs Informal leadership
  - 3.2. charismatic leadership
4. What kind of leader am I?
5. Keys to be a good leader
6. Review of learning
7. Further development

#### INTRODUCTION

Leadership is one of the responsibilities with great potential for a person, and that is why every leader must base his/her leadership on a solid platform that allows one to continue to lead both in space and time. To do this

every leader must know that their leadership must be based on principles.

The PhD candidate and graduate is used to research and teaching environments where leadership is limited mainly to a scientific-technical role. Therefore, for the transition of the PhD graduates to private enterprise, one needs to think about taking a step towards that of a people manager, providing the necessary guidelines to carry out this responsibility successfully.

This course aims to train doctorate students in understanding what is leadership and the main theories about it. It aims especially to identify their leadership skills and understand themselves with the processes associated with it.

It sets a theoretical-practical approach to leadership, how to build and how to become a good leader and learn some basic principles that every leader must follow.



**OBJECTIVES**

Professional networking has grown in value, methods and applications. This area examines professional networking methodologies and practices in today's global communications environment. Participants will learn about the effectiveness of networking and how to practice it successfully within the multicultural and work culture of enterprises.

By the end of the session, participants will be able to:

- Understand the concept of networking and its importance in today's world;
- to make a self diagnosis of their environment and existing network of contacts;
- Identify the important aspects for successful networking; and
- use their Internet profile for further networking.

**PROGRAMME OUTLINE**

1. Networking. Meaning, purpose and practice
2. Features
3. Networking today
4. Networking face to face
5. Barriers

6. Tips for better networking
7. Decalogue
8. Networking and New Technologies
9. Review of learning
10. Further development

**INTRODUCTION**

The strategic management of a network of contacts is an interesting resource that can be developed with one's personal, professional and even social goals. Obviously, the concept itself is not new, although it is true that lately, everyone is talking about it. Humans are social beings by nature and have been interacting with each other since the beginning of time. What is "newer" is the way this is now being done and, above all, the great boost that the various technological tools at our disposal, particularly the internet, have contributed in recent years.



### 3.3 Learning Units

#### Science communication for a knowledge-based society

##### OBJECTIVES

With the expansion of the media scientists are involved in communicating science to the public or “non expert”. This requires specific skills which scientists need to develop. In business, scientists also need to explain their work and research to business people who often are also non-scientists.

By the end of the training session PhD candidates and graduates will be able to:

- understand why science communication to the “non expert” public is so relevant in modern society;
- realise why there is no single universal model of science communication between scientist and “non experts”;
- build by experience a science communication framework with a maximum in scientific rigour and communicability.
- Be aware of the basic notions in history of science communication;
- Become familiar with the basic notions in “science and society”;
- Know the various communication models used for science; and
- take a proactive approach to communicate science to “non experts”

3. Science communication in a knowledge society

3.1 The collapse of the ivory tower

3.2 The necessary communication

3.3 The complex communication

3.4 Scientific citizenship

4. Science in the public arena: science and media

5. Review of Learning

6. Further development

##### INTRODUCTION

We are living in a “knowledge society”. Science is the basis of our knowledge society. Science is present in every aspect of this “knowledge society”. There is no science without communication. So, there is no “knowledge society” without science communication between scientists and the “non expert” public.

To communicate science to the “non expert” public is an essential element in a knowledge-based society. It is a necessity for scientists to learn how to develop effective science communication with the many other social actors.

##### PROGRAMME OUTLINE

1. Introduction
2. Science and the technological society





**OBJECTIVES**

By the end of the session, participants will be able to:

- Understand how and why conflicts arise and the strategies to overcome them;
- Know what a process of agreement is and how negotiators behave throughout the process;
- Identify the different types of conflicts as well as learn their quirks;
- Understand the importance and meaning of conflict in any social system;
- Understand the concept through the various models from which the study has been addressed.

**PROGRAMME OUTLINE**

1. The conflict: Definition and generalities;
2. Elements and types of conflict;
3. Causes and consequences of
4. Styles of conflict
5. How to act before a conflict
6. Rule win-win and issues to consider
7. Steps to a successful conflict resolution
8. Messages obstructions and facilitators for a good resolution of conflicts.
9. Review of learning
10. Further development

**INTRODUCTION**

Conflicts are a natural part of human life. Although hard to accept this natural or normal situation. As humans beings we are social beings dependent on relationships. Different people in society will have different opinion and often society is based on minimum consensus or agreements.

Conflicts need to be managed or operated by the people who are directly involved. They are the ones who have conceived the problem, and if they do not find solutions they will be converted into new conflicts. But in all cases it is necessary to manage conflicts and not to let conflicts manage people.

The conflict management learning unit aims to review the theoretical approaches and basic concepts of conflict resolution and to present some strategies on how to best resolve conflicts within the labour and social environment within which PhDs graduates often work.



**4.1 Learning Units****Funding, finance and resources****OBJECTIVES**

The student after the study of the unit will be:

- aware that there exist funding programmes for research work;
- able to identify national research funding programmes;
- familiar with the different content areas of research covered by FP7;
- familiar with the CORDIS website and how to navigate through it;
- able to find open calls from the CORDIS website;
- able to find partnerships working on proposals at submission stage;
- able to provide the required information to a partnership working on a proposal for submission;
- Able to develop an idea into a practical project (in workpackages)
- Able to use networks to find partners; and
- aware of the main funding programmes and project proposal application forms for FP7.

**PROGRAMME OUTLINE****INTRODUCTION**

1. Funding opportunities for Research
2. FP7-Main areas for research funding

3. CORDIS – the FP7 website
4. Opportunities for National Funding;
5. Types of funding schemes for FP7 projects
6. Joining a Partnership
7. Developing an idea into a project and choosing a call;
8. Some tips into proposal writing
9. Review of learning
10. Further development

**INTRODUCTION**

Young researchers will have opportunities for research jobs as part of externally funded projects. These are usually on short-term contracts but often young researchers find forms of external funding to maintain their employment within the organisation/ employer. This session deals with the different forms of external funding which exist for research at national and international level. There is a particular focus on European funding, mainly, but not exclusively, the FP7 programme.

Knowledge about how to attract funding is an asset to any researchers and increases their degree of employability. It is thus a vested interest to all budding researchers to familiarize themselves and start learning quickly about what opportunities exist and how to take advantage of them.



**OBJECTIVES**

The student after the study of the unit will be able to:

- Understand the different phases of a project cycle from signature of contract to final reporting;
- Be able to identify the financial and administrative procedures that need to be respected depending on the type of programme funding obtained;
- Be able to identify the targets, deadlines and work to be done by the different partners in the project and to respect these;
- Understand the advantages and disadvantages of working in a transnational team;
- Understand the importance of dissemination and how it can be effective;
- Be familiar with the forms of quality assurance mechanisms often used in project implementation;
- Identify the procedures and structures within their own institution which are responsible for the financial and administrative management of funded projects; and
- Identify and respect reporting deadlines for projects.

**PROGRAMME OUTLINE****Introduction**

1. The different phases of the project cycle
2. The legal perspective of funded projects and reporting requirements
3. Financial management of funded projects

4. Management structures in projects (with special reference to transnational projects)
5. Setting targets and working within deadlines
6. Ensuring Quality of the Scientific work
7. Dissemination
8. Final reporting and preparing for the auditing of accounts
9. Review of Learning
10. Further development

**INTRODUCTION**

This training session focuses on project management for projects which are usually externally funded. Special reference will be made to the management of projects under the main EU funding programmes such as FP7 and LLP but is also applicable to projects which are internally funded or funded under national programmes.

Young researchers (those who have just obtained a PhD or else are studying for a PhD) are often employed to work on EU and on projects funded by other sources. These young researchers are also often expected to take on administrative and project management roles and responsibilities alongside research responsibilities. Research projects (and particularly FP7 projects) are large projects with significant budgets. It is important to understand that institutions need to be accountable to how the allocated funds are used and the promised research carried out. Project management is thus an integral part of research work opportunities.



## 4.3 Learning Units

### Budgeting in a nutshell

#### OBJECTIVES

By the end of the session the participants will be able to:

- use basic budget terminology and techniques to breakdown costs;
- work with concepts needed for financial planning;
- assess project costs and feasibility;

Improve their personal situation knowing rules about financial grant application for research and business start-ups

#### PROGRAMME OUTLINE

1. Introduction
2. Key Principles
3. Budget items in details and budget elaboration.
4. Determining the financial need and grant.
5. Other issues and tips
6. Review of Learning
7. Further development

#### INTRODUCTION

During a project life cycle, both at proposal and implementation stage, the early stage researcher will often have to deal with breakdown of costs, forecasted and/or actually incurred costs, as part of the implementation of a project.

Hence, project design and project management usually require a detailed justification of the costs incurred and of the resources deployed by each partner linking them to activities implemented and justifying their necessity, including the completion of financial statements (which may require an Audit certificate ) and a summary financial report consolidating the costs of the partner at different points during the project.

This learning unit provides a general overview of basic knowledge in estimating and describing how the totality of the necessary resources are to be mobilized for the implementation of a project, including any resources that complement the effort needed.

The learning unit covers the key concepts required to master an effective breakdown and description of the major cost items (personnel, equipment, travel, subcontracting, income...). that are foreseen in a project. This includes an understanding of how resources needed can be integrated in a coherent way, and that the overall projected financial plan is adequate to implement the project.

The aim of this training unit is to build capacity, increase researchers' awareness of financial aspects including budgeting, principles and budgeting technical jargon such as person-months, financial statements, depreciation etc.

Drawing-up a budget is essential for turning an idea into a feasible and communicable plan, tying a project plan down to numbers and timing.

The budget is everything. When working out a budget, one needs first to be aware of limited resources available. Hence one needs to maximize the benefits to achieve the best solution within an ever-changing environment. A budget allows one to track how well the research is doing and to assess where changes need to be made.

The budget quantifies and estimates the needed resources to carry out the described tasks of a project. The budget work allows one to evaluate to what extent the developed work plan is realistic within the funding framework. These reflections are inevitable and critical. If the budget is produced isolated from the development of the so-called "content" of the project, a lot of problems might be faced once the project is being implemented.

Budgeting skills empower early stage researchers. Budgeting knowledge offers insight into the world of finance and resource management, and enables researchers to reach their aims and manage the available resources the best way possible for the project.



**OBJECTIVES**

By the end of the study unit the participants will be able to:

- Understand the basic concept of IPR;
- know the main means to protect IPR and the differences among them, in order to perform a right choice.

**PROGRAMME OUTLINE**

1. Introduction
2. Patents
3. Trademarks
4. Design
5. Trade Secrets
6. Copyright
7. Review of Learning
8. Further development

**INTRODUCTION**

Intellectual property rights attribute to the creator exclusive property rights over their creations; intellectual property is usually divided into two main areas, namely: industrial property characterized by the instrumental use of the creation (for example, inventions, industrial designs and trademarks); and copyright which include the artistic expression (literary and scientific works, music).

Almost every country has adopted specific laws to protect intellectual property; the main reasons to establish such set of rules are:

- to give statutory expression to the moral and economic rights of the creator, who retains the exclusive right to exclude anyone else from commercially exploiting his/her creation and to protect it from counterfeiters;
- to promote dissemination and application of its results, and to encourage scientific and industrial research, which would contribute to economic and social development.

Industrial property rights need to follow a registration procedure to be obtained; otherwise, copyright "automatically" exists from the first moment the work is created.



**OBJECTIVES**

This learning unit aims to provide PhD candidates and graduates with practical and effective techniques which will enable them to creatively think “out of the box”, to generate new and innovative ideas alone or in groups; and to explore the qualities and necessary practice needed to develop innovations in products and processes. T By the end of the session participants will be able to:

- Reflect on thinking approaches which promote creativity;
- Know how to improve their personal enquiries, capacity and flexibility in order to be more flexible;
- develop an understanding of creativity and the creativity process;
- Know and apply tools and techniques for the generation of creative ideas; and
- Seek and develop new ways of linking individual creativity, innovation and entrepreneurship.

**PROGRAMME OUTLINE**

1. Introduction
2. What is Creativity?
3. The 3 dimensions of individual creativity
4. The Creative Process
5. Actions to improve Creativity
6. Supporting tools for the generation of creative ideas: brainstorming; six thinking hats; mind mapping and catchball

7. Characteristics and management of creative groups
8. Linking Creativity and Innovation
9. Review of Learning
10. Further development

**INTRODUCTION**

Before starting their career in the labour market, PhD students and PhD graduates should be aware of the role and relevance of fostering creativity, both individually and in the organizational environment. They must be aware of the importance of creativity and how to become both smarter and more creative people capable of producing innovative ideas which can be translated into new products and services. This means that they must reflect on their own thinking approaches and learn how to improve their inquiry capacity and flexibility. To improve their chances of success in the business world, whatever career path a PhD graduate might choose, she/he needs to understand the concepts related to creativity and the meaning of being creative and to pursue a creativity process. In this regard, it is important for a PhD graduate to know and apply tools and techniques for the generation of creative ideas, and to comprehend how to link individual creativity, innovation and entrepreneurship.



**OBJECTIVES**

According to the general objective of teaching and fostering the successful practice of entrepreneurial development of new businesses, doctoral candidates after the study of the unit will be able to:

- Reflect on their own thinking with respect to entrepreneurship;
- Obtain a clearer and more comprehensive picture of concrete barriers and specific constraints hampering young people and PhD graduates from starting and running a business;
- understand concepts and crucial factors necessary for entrepreneurial engagement; and
- Seek and develop new ways of maximising individual attitudes and research to entrepreneurship.

**PROGRAMME OUTLINE**

1. INTRODUCTION
2. What is Entrepreneurship?
3. Types of Entrepreneurship and young entrepreneurs
4. Young People's motivation to engage in entrepreneurship
5. Barriers to and incentives to enterprise start-up by young people
6. Becoming an entrepreneur in practice
7. Review of learning
8. Further development

**INTRODUCTION**

The development of entrepreneurial skills in PhD students is an issue that has only become of great interest in recent years. Consequently there are not many studies investigating the specific characteristics on entrepreneurship endeavours by PhD graduates.

In addition, although the crucial role played by entrepreneurship in driving economic development and job creation is widely recognised, there has been a lack of attention from a youth perspective, and more specifically from a PhD graduate perspective. The specific traits and particularly the entrepreneurial potential of young people and PhD graduates and students, as well as their potential contribution to economic and social progress have been mainly disregarded.

This unit aims to provide a clearer and more comprehensive picture of the barriers and specific constraints which hamper young people and PhD from starting and running their own business, and at the same time identifying incentives and stimuli that make starting a business a viable alternative employment opportunity to PhD graduates and young people in general.





**OBJECTIVES**

The general objective of this learning unit is to help doctoral candidates to become aware of the sort of risks they usually take and how they can extend their risk-taking approach to: enhance their personal learning and development; and adapt and recover quickly after enduring stressful and life-changing situations. This unit aims to address some fundamental issues related to risk-taking and resilience in accordance with an entrepreneurial perspective.

By the end of the session, participants will be able to:

- Reflect on their own thinking about risk-taking and resilience fostering entrepreneurship;
- Be familiar with concepts and applications regarding risk-taking and resilience;
- Know and apply tools and techniques for improving risk-taking capacity;
- Seek and develop new ways of linking resilience and risk-taking capacity and entrepreneurship.

**PROGRAMME OUTLINE**

1. Introduction
2. The 4 dimensions of entrepreneurship: entrepreneurial personality, innovativeness, need for achievement, risk-taking and resilience

3. What are risk-taking and resilience?
4. Building risk-taking and resilience: individual beliefs and attitudes, goal focus and adaptive capacity
5. Fostering resilience and risk-taking in practice
6. Review of learning
7. Further development

**INTRODUCTION**

Before starting their career in the labour market, doctoral candidates should be aware of the role and relevance of fostering their risk-taking capacity and resilience, both on a personal level and within an organizational environment. In order to become smarter and more creative people capable of producing innovative ideas and to translate their ideas into new products and services, doctoral candidates must reflect on their risk-taking attitude and resilience in order to better nurture their entrepreneurial behaviours.



**5.4 Learning Units****How to write a business plan****OBJECTIVES**

After the study of this unit, doctoral candidates will be able to:

- understand the basic concepts of Business Plan writing;
- develop basic skills on how to evaluate a business idea;
- develop skills for presenting a business idea to potential investors or company audience; and
- understand how to obtain financing for his/her business ideas.

**PROGRAMME OUTLINE**

1. Introduction
2. Definition of Business Plan
3. Audience and uses
4. Contents and typical structure
5. Final Tips
6. Review of Learning
7. Further development

**INTRODUCTION**

Writing a business plan is in many cases the first formal step of a new business.

In order to start up a new business or a new project in an existing company (i.e. a new R&D project or launching a new product), it is usually necessary to begin with a detailed business plan which includes a detailed written description of the business idea, of its model, of its key elements, and how it will be carried on and why it could be successful. The Business Plan is the proposal you are making to an investor you would like to finance your idea. Keep in mind that every investment begins with some sort of business plan!

It is a widely used tool and despite the fact that during this unit you'll see various different elements that could compose a Business Plan, there's a sort of recognized international standard you should use for writing it.

This unit will try to explain how you should structure your business in plan, which are the relevant areas you should cover and give some hints on the key issues you should address presenting your idea to an investor.

Writing a business plan is a complex task in either case and it will take time and hard work to collect information, analyse reports, research data, make some financial simulations to make your Plan specific, detailed and above all accurate.

There's nothing worse than a rough or poorly written plan.

This learning unit aims to present all the key elements on how to write a business plan and how it should be structured. Please note that this is not a management nor an accounting unit, so specific competences will be needed to complete a business plan.

This unit will start by presenting a definition of a Business Plan and the reason why it has to be considered a basic first step in presenting a business idea to various different audiences. The unit will then deal with each specific area that should be part of a correct Business Plan before concluding with some final tips and a few questions to test your knowledge of the key concepts.

**DOCENT Doctors in Enterprise**



## 7. IMPLEMENTING A SUCCESSFUL TRAINING PROGRAMME

This part of the document provides some suggestions on how to implement a successful training programme, taking into consideration the different decisions and steps in implementation from a organizational point of view that a Careers service has to consider and take into account in developing and implementing a training course. Units have been grouped into modules for clarity but each unit can also be a stand-alone short course. Units are complementary and can be used to form a programme to help academic researchers to explore the skills and knowledge needed to take a wider view of their career.

A checklist is proposed as an instrument which may help organisations to identify some aspects related to key logistical issues in the system of Career Guidance in the initial phase. The checklist takes into consideration, specifically, the operational objectives that can be considered significant with respect to organization of a successful training programme.

The checklist is an instrument designed specifically for those personnel who might be involved in the organization and development of training. It is supposed that in the case of a number of support players, the checklist is to be filled in by all persons in charge involved in the different phases.

### ***7.1 Check list for the course convener:***

Learning units from the DOCENT project aim to help doctoral candidates to explore the skills and knowledge needed to take a wider view of their career beyond that within academia. Background and further information about the project aims can be found at [www.docentproject.eu](http://www.docentproject.eu).

Once you have decided on the topic and target participant group for the course and you have secured any funding or other support needed to run it, you may find this checklist useful as a planning tool:

TOPICS	Check
<ul style="list-style-type: none"> <li>Draw together a course team and assign responsibilities. One person might play more than one role or a role might be split between individuals. Responsibilities include: <ul style="list-style-type: none"> <li>Securing participants for the course</li> <li>Organising practical aspects (booking venue, finding equipment, administration etc.)</li> <li>Tailoring the standard programme and timings to suit local needs and circumstances</li> <li>Dealing with post-course work such as analysing feedback and measuring impact</li> </ul> </li> </ul>	✓
<ul style="list-style-type: none"> <li>Oversee and agree decisions likely to have a big influence on outcomes, e.g. finding an appropriate date and venue and appointing a suitable course tutor.</li> </ul>	✓
<ul style="list-style-type: none"> <li>Note about engaging or specifying a course tutor: The role of course tutor is central to the success of these short courses, which are designed to provide inspiration and to 'open doors' so that individuals can explore ideas and new areas of knowledge for themselves. Skill and experience in facilitation and the ability to inspire are therefore as important as expertise in the course topic.</li> </ul>	✓
<ul style="list-style-type: none"> <li>Consider inviting observers to the course in order to share practice. For example, observers might be members of university staff with potential to be course tutors/instructors or organizers in future, or staff from other universities interested in collaborating to provide inter-institutional training.</li> </ul>	✓
<ul style="list-style-type: none"> <li>Is it important to use attendance certificates?</li> </ul>	✓
<ul style="list-style-type: none"> <li>Arrange to meet with the course team after the event to share feedback including lessons learned and recommendations for modifications to future training.</li> </ul>	✓

The following 2 checklists ([Checklist for the course tutor/instructor](#) and [Checklist for the course organiser](#)) can be used to help members of the course team to plan a successful course.

## 7.2 Checklist for the course tutor/instructor:



Learning units from the DOCENT project aim to help doctoral candidates to explore the skills and knowledge needed to take a wide view of their career. Background and further information about the project aims can be found at [www.docentproject.eu](http://www.docentproject.eu).

Your role is central to the successful running of the course and so to securing positive outcomes for participants. Whilst your background in the course topic can add much to participants' experience, your main role as tutor on one of these short courses is to inspire and to 'open doors' so that individuals can explore ideas and new areas of knowledge for themselves. Rather than using a simple lecture format the emphasis should be on engaging individuals to reflect on their own development. It is part of your role to build an element of action planning in the session or to ask participants to decide their 'next steps' in exploring the course topic and how this can influence their future career.

Here's a checklist of things to do in advance of the course (not necessarily in this order!):

TOPICS	Check
<ul style="list-style-type: none"> <li>• Agree your areas of responsibility with the course convener</li> </ul>	✓
<ul style="list-style-type: none"> <li>• Do you have background in the course topic but no significant experience as a facilitator? If so, does the university offer training in facilitation skills?</li> </ul>	✓
<ul style="list-style-type: none"> <li>• As you plan your approach, find out what you can about the profile and previous experience of course participants. Do participants already know each other or not? These short courses are designed to be run with doctoral candidates, doctoral graduates or a mixture. University research staff may see themselves as distinct from doctoral candidates and having a different set of needs, which should be acknowledged</li> </ul>	✓
<ul style="list-style-type: none"> <li>• Read through the course notes               <ul style="list-style-type: none"> <li>○ Is there anything you want to omit/enhance/change/explain? Adding examples from your own experience and local knowledge such as statistics will add value</li> <li>○ Building in advance preparation for participants or offering post-course activities such as online networking or online chats with experts can add</li> </ul> </li> </ul>	✓



<p>greatly to the impact of the course on individuals</p> <ul style="list-style-type: none"> <li>○ If you are preparing a pre-course message to be sent out to participants this will set the tone for the course. Use it to convey the expectation that individuals will be active participants and ready to be inspired to take their own learning and development further!</li> <li>○ Check timings and make sure that you are clear about how you will run the session. Make a time plan and stick to it. If you think that participants may not arrive on time take measures to minimise disruption such as advertising an earlier start time and starting with coffee</li> <li>○ Find ways for individuals to engage with their own development in the area covered by the course. Always build in an element of action planning or ask participants to decide their 'next steps'</li> <li>○ Decide what you will need before, during and after the course</li> </ul>	
<ul style="list-style-type: none"> <li>• Discuss practical considerations with the course organiser. For example:             <ul style="list-style-type: none"> <li>○ What size and style of venue do you need?</li> <li>○ What equipment do you want and do you plan to print handouts?</li> <li>○ What information should be sent to participants in advance of the course?</li> <li>○ Would you like to offer refreshments? Do you want name badges?</li> <li>○ Would you benefit from extra help on the day if this is available?</li> <li>○ What safety measures or announcements are necessary?</li> <li>○ If there will be any post-course follow-up with participants (e.g. action planning reminders or asking for feedback) agree how this will be managed</li> <li>○ Is it possible to support post-course networking, e.g. online?</li> </ul> </li> </ul>	✓
<ul style="list-style-type: none"> <li>• Think about the best ways to measure the impact that the course has on participants. Discuss ideas with the course team</li> </ul>	✓
<ul style="list-style-type: none"> <li>• Plan to feed back lessons learned and recommendations for modifications to the rest of the course team</li> </ul>	✓
<ul style="list-style-type: none"> <li>• Keep other members of the course team informed of progress at all stages of planning and discuss any concerns as soon as they arise</li> </ul>	✓



### 7.3 Checklist for the course organiser

Learning units from the DOCENT project aim to help doctoral candidates to explore the skills and knowledge needed to take a wider view of their career. Background and further information about the project aims can be found at [www.docentproject.eu](http://www.docentproject.eu).

Your role is crucial to the smooth running of the course and hence to positive outcomes for course participants. Here's a checklist of things to consider (not necessarily in this order!):

TOPICS	Check
<ul style="list-style-type: none"> <li>• Agree your responsibilities with the course convener</li> </ul>	✓
<ul style="list-style-type: none"> <li>• Keep other members of the course team informed of progress at all stages of planning and discuss any concerns as soon as they arise</li> </ul>	✓
<ul style="list-style-type: none"> <li>• If it is your responsibility to engage a course tutor, first check requirements with the course convener. These short courses are designed to provide inspiration and to 'open doors' so that individuals can explore ideas and new areas of knowledge for themselves. Skill and experience in facilitation and ability to inspire is therefore as important as expertise in the course topic</li> </ul>	✓
<ul style="list-style-type: none"> <li>• If the course tutor does not have extensive experience in facilitation, can training be provided?</li> </ul>	✓
<ul style="list-style-type: none"> <li>• Working with the course tutor:               <ul style="list-style-type: none"> <li>○ Provide course materials to the tutor well in advance</li> <li>○ Decide when timings/venue/equipment requirements etc. will be agreed</li> <li>○ Find out what information the course tutor wishes to send to participants in advance. Will participants be asked to do any pre-course preparation? Will anything be sent out post-course?</li> <li>○ Check well in advance of the course that the tutor is familiar with the material to be delivered and has made any desired amendments or enhancements. Finalise equipment and handout requirements</li> <li>○ Ask for files for any slides to be used (e.g. 2 days in advance) so that you can make checks and any modifications necessary, for example</li> </ul> </li> </ul>	✓



branding, image acknowledgements <ul style="list-style-type: none"> <li>○ Arrange payment for services and expenses if applicable</li> </ul>	
<ul style="list-style-type: none"> <li>• Getting course participants:             <ul style="list-style-type: none"> <li>○ Clarify who the course is aimed at, i.e. research staff, doctoral candidates or a mixture</li> <li>○ Agree the maximum number of course participants and a target minimum number</li> <li>○ Agree the best approach to advertising the course, including where to advertise (use all appropriate channels) and influential/appealing wording. In addition offering refreshments, using an interesting venue or similar can help with recruitment!</li> <li>○ Consider whether to advertise to supervisors/managers as well as to the target group</li> <li>○ How will course bookings and other administration be dealt with? Publish the suggested criteria in case the course is over-subscribed</li> <li>○ If you think that drop-outs might be a problem, consider asking prospective participants to pay a returnable deposit</li> <li>○ With the course convener and the course tutor, decide on the appropriate information to collect about participants. For example it might be helpful to know participants' stage of study or funding source in advance. Always ask prospective participants whether they have any special requirements (e.g. disabilities) as this might affect your choice of venue or the way the course is delivered</li> </ul> </li> </ul>	✓
<ul style="list-style-type: none"> <li>• Venue and equipment:             <ul style="list-style-type: none"> <li>○ Find out venue and timings requirements from the course convener</li> <li>○ Find out the course tutor's requirements, including venue requirements and equipment needed. Confirm 'who does what?'</li> <li>○ Book a suitable venue and agree all costs and a payment schedule in advance. Once you know the final numbers and timings go back to the venue to confirm final details</li> <li>○ Visit the venue to check that rooms are suitable and meet any requirements set by the course tutor, for example for adequate light or chairs that can be moved. Assess the venue for safety risks</li> </ul> </li> </ul>	✓





<ul style="list-style-type: none"> <li>○ If necessary, make signs to help participants to find the course room(s)</li> <li>○ Is all the necessary equipment available at the venue? If not, who will buy or collect it, how will it be taken to the venue on the day?</li> <li>○ How will any technical requirements be met, e.g. who will be available to help in case of electronic equipment failure?</li> </ul>	
<ul style="list-style-type: none"> <li>• Information: <ul style="list-style-type: none"> <li>○ Send pre-course information to participants (e.g. 2 weeks+ in advance), including venue details, maps and travel advice. Include information about the course including the course objectives, any message from the course tutor and requirements for advance preparation if any. It might be of interest to include a 1 paragraph biography of the course tutor, especially if she/he has extensive experience in the topic to be covered</li> <li>○ Print any handouts to be given out on the day and any other materials the course tutor may request</li> </ul> </li> </ul>	✓
<ul style="list-style-type: none"> <li>• Gathering feedback: <ul style="list-style-type: none"> <li>○ Plan to feed back lessons learned and recommendations for modifications to the rest of the course team</li> <li>○ Agree a process for collecting post-course feedback from participants (e.g. handwritten on the day, within one week by email). Discuss how the longer-term impact of the course can be measured with the rest of the course team. Put in place any measures agreed</li> </ul> </li> </ul>	✓
<ul style="list-style-type: none"> <li>• Consider inviting observers to the course in order to share practice. For example, observers might be members of university staff with potential to be course tutors or organisers in future, or staff from other universities interested in collaborating to provide inter-institutional training</li> </ul>	✓

## 8. CONCLUSION

The aim of this document has been to provide the reader with an explanation and a resume of the didactical material designed by the Docent partnership and which is available in their full-length version on request. You can obtain the electronic version of the Learning Units by



contacting the partnership using the form “Further information” that you can find on the Docent website with this link: <http://www.docentproject.eu/en/risultati.html>

The designed didactical material contained in the 18 Learning Units organized in the 5 Training Modules has been designed as training paths that can be used in the context of the Docent Career Service Model.

It is hoped that the Training Paths developed within the project DOCENT can be useful to provide doctoral students and graduates with the key skills to become competitive professional figures and to allow their efficient employment outside academia.

