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REPORT ON THE PILOT EVALUATION OF ALL INITIATIVES IN WP3 (D3.4)

Prepared by Work Package 3 lead

University of Silesia in Katowice















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List of acronyms

EKA - Estonian Academy of Arts

T4ERI - Transform 4 European Research and Innovation

T4EU - Transform4Europe Alliance
UA - the University of Alicante
UNITS - the University of Trieste

UNISOFIA Sofia University St. Kliment Ohridski

USAAR - Saarland University

USil - the University of Silesia in Katowice

VMU - Vytautas Magnus University

HRS4R - Human Resources Strategy for Researchers as a part of EU strategy

R&I - Research and Innovation GEPs - Gender Equality Plans

IDUB - Initiative of Excellence - Research University

Summary

The presented document outlines the evaluation of pilot initiatives under Work Package 3 (WP3) of the Transform 4 European Research and Innovation project. Its main objective was to develop joint strategies promoting leadership and entrepreneurship in scientific careers at the T4EU partner universities. The WP3 activities are primarily focused on increasing the attractiveness of the T4EU alliance universities for talented researchers by promoting research excellence and offering the comprehensive support and mentoring, also for the administrative staff and the doctoral students. The strategy has been designed to develop the joint standards for scientific careers that include strengthening of the human capital, open science, mentoring, and collaboration with stakeholders.

The report provides a detailed description of the activities related to the series of leadership and entrepreneurship training sessions held as part of the pilot Leadership Academy in Science programme. The training covered a wide range of topics including open science, data management, networking, leadership in science, fundraising, and gender equality in science. The series of trainings was designed and prepared to address the competency gaps identified in the previously conducted surveys and analyses. All activities aimed to equip the researchers (at various stages of their careers) and the administrative staff with the necessary skills to tackle academic challenges, improve scientific performance, and enhance international collaboration.

The report also emphasises the importance of providing the continuous training, mentoring, and ensuring mobility between the partner universities within the T4EU alliance to support the development of academic careers. These opportunities allow researchers to exchange knowledge, build international networks, and gain diverse experiences that are essential for career growth in academia. In addition, the report offers detailed recommendations and guidelines for the future editions of the Leadership Academy, aiming to refine the programme and better address the evolving needs of researchers.

1. Introduction

The report is a summary of the pilot action plan, presented in the D3.3 Action plan for all initiatives in the WP3. The report evaluates the joint standards for scientific careers at all levels (R1-R4), evaluates tools and measures for the joint promotion of the early-career researchers and evaluates the Centre for Leadership in Science and Management. The Action Plan for all initiatives from the WP3 "The Best Careers for the Brightest Minds" is developed in close cooperation with the partners and based on the outcomes of surveys, discussions and the following analyses and the map of opportunities in the T4EU. The primary objective of the WP3, in developing the joint strategy for scientific careers, was twofold:

- Increasing the attractiveness of the T4EU partners for the excellent researchers by developing the joint innovative standards for scientific careers that align with the real aspirations and requirements of the top researchers. Through fostering the environment conducive to research excellence, the T4EU alliance aims to attract and retain the exceptional talents from across the globe.
- Strengthening Human Capital in Research and Innovation to nurture young talents and leadership in science by providing the comprehensive support and mentorship. The joint strategy undertakes to empower the academic staff and the doctoral students/PhD candidates to flourish in their research endeavours and contribute to the advancement of knowledge.

In order to address the diverse challenges and opportunities related to scientific careers in the T4EU alliance, the development of the joint strategy for WP3 (Deliverable D3.2), implemented in the Action Plan for all initiatives for the WP3 (Deliverable D3.3), involved a comprehensive and systematic methodology.

Methods used in all the research and analyses conducted under the WP3 are as follows:

- Surveys focused on the academics at all career levels R1 R4, both employed and not employed, and the doctoral school students,
- In-depth interviews with the representatives of doctoral schools and the representatives of the units responsible for the academic career development,
- SWOT analysis evaluated by the staff supporting the career development of academics,
- The survey conducted among the doctoral school students,
- The survey conducted among the stakeholders,
- Two workshops and an accompanying survey conducted with the representatives of R1 R4 staff in leadership and entrepreneurship competence development.

The main reports and additional summaries of questionnaires that deepen the analysis of the scientific careers were included in the final Annex to the Deliverable D3.1 – Joint Standards for Scientific Careers. Each report contains its own

methodology. The detailed schedule of the Pilot Action plan was presented in the Annex to Deliverable D3.3.

Joint standards and the joint strategy were settled based on the key findings, reported in the D3.1 and D3.2.

The concept of a common standard was based on distinguishing two levels of the planned activities: the level of individual universities and the level of the alliance of universities. At the level of the individual universities, considering the results of the analysis that differentiate the situation of individual partner universities, within the framework of the common standard we proposed:

- to decide, by the authorities of each partner, how resources (human, financial, material, etc.) will be secured to implement the common standard,
- to minimise gender inequalities and biases in accordance with the policies described in the Gender Equality Plan,
- to define the scope of cooperation with local stakeholders in terms of the degree of their involvement in the following activities, in accordance with the mutual expectations and capabilities.

At the alliance level five common standards have been adopted:

- Emphasis on the Mentees
- Emphasis on Mentors and Experience
- Measurable Efficacy of Mentoring
- Increased Visibility of Research
- Competence of the Open Science.

They covered the following needs and competence gaps:

- 1. Lack of the culture fit, exclusion from informal networks, and insufficient mentoring or lack of mentoring were identified as barriers for academic staff at all career levels (R1-R4).
- 2. Academic staff at various levels experienced the pressure to publish academic work and undergo continuous evaluations.
- 3. The feeling of uncertainty related to the formal aspects of employment i.e., job security and professional stability applies to the academics of early stages of their scientific career R1 R2.
- 4. The conviction of lacking the expert knowledge essential to successfully conduct the scientific research applies to the academics in the early stages of their scientific careers R1 R2.
- 5. Anxiety and stress related to undergoing the continuous scientific evaluation both inside and outside the university applies to R4.
- 6. Work overload, administrative ambiguity, and challenges in obtaining research funds identified as challenges at different career levels.

2. Implementation of the pilot Action Plan for all initiatives in the WP3

The action plan formulated and developed by the WP3 team clarified the activities and addressed the goals of this work package. It focused on the actions listed below, which are introduced and described in the subsequent tables, helping to evaluate the validity of joint standards and their usability across the diverse cohorts of researchers.

Aim No. 1 – supporting and monitoring of the further development of scientific careers for researchers at three levels: R1–R2 – recognized researchers; R3 – established researchers and R4 – leading researchers.

Task and activities related with aims No. 1 - No. 7

- (1.1) To create T4EU alliance HR virtual board as a platform to exchange experiences and knowledge:
- 1. Nomination of members of the HR virtual board.
- 2. Organization of the virtual HR board meetings.
- 3. The joint declaration on the HR4R for the T4EU alliance.

Task	Action	Start/End	Completed/
(11)			not completed
(1.1) To create the	1.1.1. Nomination of members	OCT 2023/DEC	YES
T4EU alliance virtual	of the virtual HR board	2023	
HR board as a platform to exchange	1.1.2. Organization of the virtual HR board meetings	OCT 2023/ APR 2024	YES, partially
experiences and knowledge	1.1.3. The joint declaration on the HR4R for T4EU alliance	OCT 2023/MAY 2024	YES, partially

Explanation of deviation 1.1.2.: Due to the fact that the second phase of the T4EU initiative started on 1 November 2023 and the resulting significant amount of workload for the staff involved in both projects (T4ERI and T4EU) at the partner universities, one council meeting was held.

Explanation of deviation 1.1.3: Establishing a joint declaration was not possible during this project. At the first meeting, the virtual HR council started the discussions on a joint declaration and potential solutions within the framework of the EU HR strategy for researchers, as well as the new Charter. We recommend that this issue be considered in the ongoing T4EU follow-up project for further cooperation.

Aim No. 2 – providing trainings in the practice of open science and the system of micro-credential for R1-R4

Aim No. 4 – providing professional training for researchers outside academia (stakeholders).

(1.2) To plan trainings for academics R1-R4

1.2.1. The proposal of the training to fulfil the needs diagnosed in WP3 analyses.

Task	Action	Start/End	Completed/ not completed
(1.2) To plan trainings for academics R1-R4	1.2.1. The proposal of the trainings to fulfil the needs diagnosed in WP3 analyses	OCT 2023/ DEC 2023	YES
	1.2.2. Regulations for recruitment to trainings	OCT 2023/ JUL 2024	YES

(1.3) To plan trainings/ workshops for the stakeholders.

1.3.1. The proposal of the trainings/seminars/workshops to fulfil the needs diagnosed in the WP3 analyses

Task	Action	Start/End	Completed/ not
			completed
(1.3) To plan trainings/ workshop for the stakeholders	1.3.1. The proposal of the trainings/seminars/workshops to fulfil the needs diagnosed in the WP3 analyses	OCT 2023/ JUN 2024	YES, partially
	1.2.2. Regulations for recruitment to trainings	OCT 2023/ JUL 2024	YES

Explanation of deviation 1.3.1.: Stakeholder involvement in WP3 was lower than expected. A wide array of workshops, training sessions, and meetings with scientists was offered as part of the Katowice City of Science 2024 initiative, which created additional competition for our activities. As a result, it was decided to involve stakeholders in some of the sessions during the conference and workshops held as part of the European Open Forum Science and Talent Fair.

Aim No. 3 – extending the concept of geographical mobility to include the virtual mobility in order to provide WLB oriented practices and rules, especially for the professionals with special needs (i.e., parents' researchers, researchers with disability and other minorities).

(1.4) To plan the short-term internships

1.4.1 Regulations for the short term internships pilot programme

Task	Action	Start/End	Completed/ not completed
(1.4) To plan the	1.4.1 Regulations for the	OCT 2023/JUN 2024	YES
short term	short term internships		
internships	pilot programme		

Aim No. 4 – mentees' programme addressed to the group of the first step researchers (R1 – doctoral students/ PhD candidates) to empower their professionals' networks.

- (2.1) To organise mentees' programme for R1-R2
 - 2.1.1. Development of the recruitment rules for the mentoring programme
 - 2.1.2. Recruiting for the mentoring programme
 - 2.1.3. Carrying out the mentoring programme at the alliance level/ Drafting the implementation plan of the mentoring

Task	Action	Start/End	Completed/
			not completed
(2.1) To	2.1.1. Development of recruitment rules for	NOV 2023/	YES
organise	the mentoring programme	JUN 2024	
mentees' programme for R1-R2	2.1.2. Recruiting for the mentoring programme	NOV 2023/ JUN 2024	YES
	2.1.3. Carrying out the mentoring programme at the alliance level/ Drafting the implementation plan of the mentoring	MAY 2024/ JUL 2024	YES

Aim No. 5 – support of the first step researchers (R1) in building their scientific career by providing consultations with the HR or other specialists.

- (2.2) To inform PhD candidates/R1 about the possible career paths.
 - 2.2.1. Identifying possible career paths in HEI sector and in other sectors
 - 2.2.2. Online brochure about the possible career paths

Task	Action	Start/End	Completed/ not completed
(2.2) To inform PhD candidates/R1 about the possible career paths	2.2.1. Identifying possible career paths in HEI sector and in other sectors	JAN 2024/ JUL 2024	YES, partially

2.2.2. Online brochure about the possible career paths	JAN 2024/ SEPT 2024	Work in progress
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Explanation of deviation 2.2.1.: With Katowice hosting the European City of Science in 2024, the ESOF conference, particularly the panel discussions and presentations during the EU Talent Fair, provided an ideal opportunity to introduce the early-career researchers and the doctoral students/PhD candidates to potential career paths, both within the science sector and beyond academia, in other areas of the economy. Speakers included representatives from the European Commission, Polish research universities, and business stakeholders collaborating with universities.

Explanation of deviation 2.2.2: In cooperation with the Doctoral School of the University of Silesia in Katowice, an online brochure template will be prepared for the possible further use.

Aim No. 6 – promoting open calls for the academic positions to the most talented young researchers to retain the talents at the partner universities.

(2.3) To inform PhD candidates/R1/ DS about the job offers/open calls across the T4E.

2.3.1. Identifying the most effective communication channel across the alliance

Task	Action	Start/End	Completed/
			not completed
(2.3) To inform the PhD	2.3.1. Identifying the most	OCT 2023/	YES, partially
candidates/R1/ DS about	effective communication	JUN 2024	
the job offers/open calls	channel across the alliance		
across the T4E			

Explanation of deviation 2.3.1: The research conducted during the project confirmed the need to establish an effective channel for informing the doctoral students, the PhD candidates, and the early-career researchers about the potential paths for their professional development, both at the level of the entire alliance and at the individual universities. The identified differences between the alliance partners in terms of organisational and legal frameworks for doctoral schools and doctoral education process were conveyed to the WP leaders in the follow-up T4EU project, with a focus on creating a unified legal framework for these new solutions.

Aim No. 7 - strengthening collaboration with stakeholders to ensure the relocation of talents from business to academia and vice versa.

(2.4) To organise Talent Days (at the Talent Fair within ESOF 2024)

2.4.1. To organise a T4E doctoral students pavilion during the Talent Fair 2024 and ESOF 2024

Task	Action	Start/End	Completed/ not completed
(2.4) To organise	2.4.1. Organise a T4E	JAN 2024/	YES
Talent Days (at the	doctoral students pavilion	JUN 2024	
Talent Fair within	during the Talent Fair 2024		
ESOF 2024)	and ESOF 2024		

Aim No. 8 – implementing the pilot programme for the Academy of Leadership in Science (ALiS)

- (3.1) To organise the pilot programme for the ALiS
 - 3.1.1. Nomination of members for the Leadership Academy virtual board
 - 3.1.2. Development of the recruitment rules for the Academy of Leadership in science programme
 - 3.1.3. The first recruitment for the Academy of Leadership in Science programme

Task	Action	Start/End	Completed/ not completed
(3.1) To organise the	3.1.1. Nomination of members for the Leadership Academy virtual board	OCT 2023/ DEC 2023	YES
pilot programme for the ALiS	3.1.2. Development of the recruitment rules for the Academy of Leadership in science programme	OCT 2023/ JAN 2024	YES
	3.1.3. The first recruitment for the Academy of Leadership in Science programme	JAN 2024/ APR 2024	YES

Aim No. 9 - minimising the competences gap among leaders in science.

- (3.2) To provide the pilot programme of ALiS
 - 3.2.1. Diagnosis of a competence gap
 - 3.2.2. Evaluation of the pilot programme

Task	Action	Start/End	Completed/ not completed
	3.2.1. Diagnosis of competence gap	FEB 2024/ MAY 2024	YES

(3.2) To provide the	3.2.2. Evaluation of	MAY 2024/ SEPT	YES
pilot programme of	the pilot programme	2024	
ALiS			

Aim No. 10 – providing trainings for other professionals among the non-academic staff supporting researchers' development.

- (4.1) To plan trainings for the support staff (non-academic)
 - 4.3.1. The proposal of the trainings to fulfil the needs diagnosed in the WP3 analyses
 - 4.3.2. Regulations for recruitment to trainings
 - 4.1.3. The trainings for the research support staff

Task	Action	Start/End	Completed/ not completed
(4.1) To plan trainings for support staff (non- academic)	4.3.1. The proposal of the trainings to fulfil the needs diagnosed in the WP3 analyses	OCT 2023/ JUN 2024	YES
	4.3.2. Regulations for recruitment to trainings	OCT 2023/ JUN 2024	YES
	4.1.3. The trainings for the research support staff	JUN 2024/JUL 2024	YES

Aim No. 11 - strengthening collaboration with the stakeholders to ensure the relocation of other professionals from business to academia and vice versa.

- (4.2) To organise the session/invited symposium at ESOF 2024
 - 4.2.1. Nomination of the stakeholders' representatives
 - 4.2.2. Organization of the invited symposium / session at ESOF 2024

Task	Action	Start/End	Completed/ not completed
(4.2) To organise the session/ invited symposium	4.2.1. Nomination of the stakeholders' representatives	NOV 2023/ JUN 2024	YES
at ESOF 2024	4.2.2. Organization of the invited symposium / session at ESOF 2024	JAN 2024/ JUN 2024	YES partially

Explanation of deviation 4.2.2.: Stakeholder representatives, including the ones from the European Commission, research universities in Poland, managers, entrepreneurs, and innovators, were invited to participate in the European Talent Fair. They contributed as participants and speakers in panel discussions, presentations of success stories, and workshops aimed at improving competencies and skills.

3. Implementation of the Leadership Academy in science programme (joint standards, early-career researcher activities, leadership activities)

In the course of the analyses, career indicators were grouped into shared expectations for both R1-R2 and R3-R4 researchers and combined with the expectations of the research support staff. As a result, under the umbrella of the Leadership Academy, common activities were developed to support these diverse cohorts of researchers, as well as the administrative staff.

This part of the report is a result of the collaborative work conducted by USil, UNITS, and UA to promote academic leadership in science and boost research quality by improving professional research support. It covers a series of initiatives within WP3 "The Best Careers for the Brightest Minds" pilot of the T4ERI project. The main aim of this part of the report is to describe the training series conducted by the engaged parties, and mentoring visits, as well as the impact of the programme on the participant's performance.

The report is based on the following four principles:

- 1. The participants of the project were recruited from the diverse groups of academics (according to the reference framework from the novice academics described as R1 to R4 full professors) as well as from the professional research support staff engaged in the management in the academic ecosystem. The recruitment procedure was open to all academics and non-academic employees of the university, with special attention to the gender and diversity issues.
- 2. The diverse group was investigated in terms of the competence gaps previously identified in the T4ERI project as basic indicators of academic challenges.
- 3. Participants were transferred to the specific group of training sessions with an obligation to take part in three of them, preferably out of the five previously designed for the whole cohort.
- 4. The sessions were supplemented by participants' individual visits to partner institutions based on Erasmus+ training funds.
- 5. The dropout rate was substantially low. One person left the project due to the change of employer. Five were unable to take part in the mentoring sessions abroad due to the mentors' unavailability.

3.1 List of training courses carried out under the pilot activities

Based on the main indicators identified during the previous study phases, and after conducting the pre-test of research competencies, participants were trained by offering a series of development sessions. Below descriptions of the training sessions are presented along with profiles of the instructors.

3.1.1 Open Science and an introduction to data management part 1

Trainer: Bogumiła Gołek, MSc

Date: 26.06.2024

Bogumiła Gołek – since April 2023, she has been serving as a Data Steward responsible for the area of STEM sciences at the University of Silesia. In this role, she has been providing a comprehensive support in the creation, implementation, and evaluation of data management plans, as well as actively participating in the co-creation of the open science initiatives. A passionate advocate for FAIR (Findable, Accessible, Interoperable, and Reusable) Research Data Management (RDM), she has been working closely with students and researchers to promote best practices in the data stewardship.

She is also a beneficiary of the largest Data Stewardship programme in Poland, specifically the IDUB (Initiative of Excellence - Research University) programme entitled "Data Steward - Research Data Management" conducted at the University of Silesia. This prestigious programme is dedicated to enhancing the quality of research data management within the university. Work in the IDUB programme further solidified Bogumiła Gołek's commitment to fostering the environment of excellence in scientific research and data management.

Subject of the training:

The training was a theoretical introduction to the concepts of open science and research data management. Participants were introduced to the basic definitions and initiatives supporting open science, such as the European Open Science Cloud, and the FAIR principles (Findable, Accessible, Interoperable, Reusable). Aspects related to creating and managing research data were also discussed, including developing data management plans, data documentation, and selecting appropriate repositories for data storage. The training aimed to develop the skills needed for responsible and compliant data management in accordance with the modern standards.

The key takeaways for participants:

- Understanding the core principles of open science and how it benefits the research community.
- Practical knowledge of applying the FAIR principles to ensure data is findable, accessible, interoperable, and reusable.

- Ability to develop comprehensive Data Management Plans (DMPs) that align with institutional and funding requirements.
- Awareness of the differences between open data and FAIR data, and how to manage them accordingly.
- Insight into the scale and the costs associated with data generation, as well as strategies for the responsible long-term data management.

3.1.2 Open Science and an introduction to data management part 2

Trainer: Maciej Bisaga, PhD

Date: 03.07.2024

Dr Maciej Bisaga is a PhD in biological sciences, specialising in the molecular biology and bioinformatics. He graduated from the University of Aberystwyth in Wales, UK, and the University of Silesia in Katowice, Poland. In addition, he is a participant in the postgraduate programme at the University of Vienna, where he specialises in the area of Data Stewardship and Research Data Management. Currently, he is the Open Science Coordinator at the University of Silesia, where he is tasked with supporting open access initiatives for the scientific research. In addition, he is responsible for coordinating the work of the faculty data stewards, who take care of the research data management at the university. His work contributes to promoting free access to the scientific knowledge and effective data management, which is crucial for the development of scientific research. Thanks to his involvement, the University of Silesia can effectively exploit the potential of the open access and data management in science and education.

Subject of the training:

The training focuses on the practical aspects of Research Data Management (RDM). Participants were introduced to managing the research data lifecycle, from data creation through data organisation and security to the long-term storage and sharing of data. A key component of the training was the discussion on creating effective Data Management Plans (DMPs) that address the resource management, data quality control, and compliance with the legal and ethical requirements. Additionally, methods for securing research data were presented, along with best practices for the long-term data preservation in repositories. The importance and structure of README files were also covered, emphasising their role in documenting the contents and organisation of datasets to enhance their usability and discoverability.

The key takeaways for participants:

- Understanding of the research data lifecycle and the ability to manage data at every stage.
- Practical skills in creating the Data Management Plan (DMP) that meets institutional and funding requirements.
- Knowledge of methods for securing research data, including regular backups and implementing appropriate security measures.

- Understanding the principles of data sharing in compliance with FAIR guidelines and familiarity with the available repositories for the long-term data preservation.
- Insight into creating and utilising README files to effectively document datasets and improve data accessibility.

3.1.3 Networking and scientific performance

Trainer: Assoc. Prof. Damian Guzek, PhD DSc

Date: 04.07.2024

Prof. Damian Guzek works at the Institute of Journalism and Media Communication, University of Silesia in Katowice. He is also the PI of the Polish National Science Centre's (NCN) project 'Papal Authority Transformed by Changes in Communication' (2019–2023) and Polish coordinator of the 'T4ERI' Horizon2020 project. Prof. Damian Guzek is a member of the Committee on Communication and Media of the Polish Academy of Science (years 2024–2027). He has been involved in several research projects in digital communication, religion and politics. After the doctorate in Katowice, he conducted his post–doc at the Religion and Society Research Centre of Uppsala University as well as a research internship at the School of Divinity, New College, University of Edinburgh. He was also a visiting fellow at the School of Humanities, Keele University (2016) and at the ERC Consolidator in the 'Dissident Networks Project' (DISSINET), hosted at Masaryk University's Centre for the Digital Research of Religion (2022).

Subject of the training:

This session covers theoretical and practical issues of academic networking, building professional development networks, and fostering academic and administrative ties for researchers and research managers. Apart from a series of theoretical reflections, it also provides practical tools to set up and enhance networking activities both within the country and abroad.

The key takeaways for participants:

- Understanding the essence of networking.
- Understanding your own capabilities and limitations in practising networking.
- Networking strategies.
- Practical suggestions related to networking.

3.1.4 Leadership in academia

Trainer: Prof. Michał Daszykowski

Date: 04.07.2024

Prof. Michał Daszykowski is a former Vice-Rector for Science and Finance (2021-2024) and currently serves as Vice-Rector for Finance at the University of Silesia

in Katowice. He has an extensive experience in leadership roles within academia both at institute and university level, and in coordinating major strategic science projects (i.e. IDUB, T4ERI, ESOF and EU Talent Fair 2024). He is a Professor of Chemistry at the Institute of Chemistry, where his research focuses on developing and applying chemometric approaches to facilitate the analysis of chemical data, particularly complex instrumental signals from various analytical platforms and multi-channel detectors. Prof. Daszykowski has published 68 articles in peer-reviewed journals and authored ten book chapters. His Google Scholar profile lists a Hirsch index of 31 and 3,566 citations. From 2000 to 2004, he completed a research fellowship and a postdoctoral year at the Free University of Brussels, collaborating with companies like Shell, Johnson & Johnson, and Unilever. He is a recipient of the prestigious "Young Scientist" scholarship awarded by the Foundation for Polish Science in 2005 and serves as a reviewer and editorial board member for several scientific journals, including *Acta Chromatographica* and *Chemometrics and Intelligent Laboratory Systems*.

Subject of the training:

The training focused on the various aspects of leadership within academia, providing participants with a comprehensive understanding of the roles and responsibilities of leaders in academic institutions. The session covered the importance of strategic vision and planning, promoting academic excellence, and fostering an inclusive environment. Additionally, the training emphasised the significance of the ethical governance and community engagement, equipping participants with the knowledge needed to effectively lead and manage academic teams and projects. The discussion included the real-life examples and practical insights to help participants apply the presented concepts in their own institutions.

The key takeaways for participants:

- Understanding of the different leadership roles and responsibilities within academic institutions, including the importance of strategic vision and planning.
- Insight into fostering academic excellence through promoting a highquality research, securing funding, and encouraging collaboration.
- Practical knowledge of creating an inclusive and supportive environment within academic settings, emphasising diversity and equity.
- Awareness of the need for ethical governance, including upholding transparency and integrity in the decision-making processes.
- Familiarity with the significance of the community and industry engagement, and the ability to build partnerships with the external stakeholders.

3.1.5 Fundraising

Trainer: Dobromiła Stano, MA

Date: 24.07.2024

Dobromiła Stano, a graduate of the University of Silesia in Katowice, completed the postgraduate studies in EU funds management at the AGH University of Krakow. Project Manager for more than fifteen years; since 2019, she has been employed at the University of Silesia in Katowice in the Projects Department, where she is responsible for managing projects financed under Structural Funds, Horizon 2020, Horizon Europe, CERV, Justice, EEA, NAWA, PNFN, and V4. She was a Consultant in Financial Absorption at the University of Silesia in Katowice for three years. Coordinator of the project financed within the CERV Programme. She managed the international office and held the position of the Erasmus+ coordinator for ten years at a non-public Higher Educational Institution.

Subject of the training:

The training focused on providing participants with a comprehensive knowledge of obtaining funding for science and research. During the session, participants received the information on raising funds from public and private sources. Participants received information on the European Union's Horizon Europe Framework Programme – the EU's largest–ever research and innovation programme. Funding opportunities were presented: high–risk frontier research, access to research infrastructures, academic mobility, setting up research teams, science and business cooperation and international research projects. In addition, the participants gained knowledge about private funding for science.

The key takeaways for participants:

- Getting familiar with different funding sources such as state grants, EU funds, grants from the non-profit organisations, and industrial funding sources.
- Acquiring knowledge on programmes appropriate to the specifics of their research. Participants should be able to tailor their proposals to the requirements of the specific funding source.
- Awareness of the need to monitor the current funding sources and trends, such as funds dedicated to specific fields of science, to increase the chances of obtaining grants.
- Awareness of the need to be open to seeking the non-traditional funding sources and to use innovative methods of engaging with industry and other sectors.
- Understanding the need to be flexible and ready to adapt their funding strategies in response to the changing market and policy conditions.

3.1.6 Gender equality

Trainer: Magdalena Półtorak, PhD

Date: 23.07.2024

Magdalena Półtorak, PhD in law. She holds the Assistant Professor position at the Institute of Legal Studies of the Faculty of Law and Administration of the University of Silesia in Katowice. She is a member of the research team on the development of public international law and human rights. Co-chairwoman of the Commission for Equality and Diversity at the University of Silesia in Katowice in 2021-2024, cocreator of the Gender Equality Plan of the University of Silesia, and Degree Programme Director of the degree programmes: Entrepreneurship, International Business Law and Arbitration, Environmental Administration. She participated in several research grants, she is also a member of the ILA GP, and ERA Peter Caesar Scholarship beneficiary, cooperating with the Odysseus Migration Network and the EuroGender Network. Author of dozens of publications in the field of legal guarantees of gender equality, international protection of women's rights (with a special focus on the rights of migrant and refugee women) and work-life balance, published among others by Routledge, Springer and Peter Lang. She is an active participant of the national and international scientific conferences on gender equality in various contexts and aspects and on vulnerable persons in the international migration law.

Subject of the training:

The subject of the training was the issue of gender equality plans, which are intended to contribute to ensuring equal opportunities in the academic environment. The training raised the issue of the origins of gender inequality in this area (women's access to higher education), presented current statistics on the gender ratio of students and employees in higher education (including career progression, proving the existence of a 'glass ceiling'), pointed out critical international legal standards for the application of the so-called temporary special measures (compensatory measures). A vital element of the training, however, was the presentation of the requirements of the EU Horizon Europe Programme, which sets gender equality as a cross-cutting principle and aims to eliminate gender inequality and intersecting socio-economic inequalities throughout research and innovation systems, including by addressing the unconscious bias and systemic structural barriers. Participants learned what a Gender Equality Plan is and what conditions (formal and in terms of content) it must fulfil, as well as how to create the first (or) subsequent Plan (using, among other things, the electronic tool developed within the GEPARD project). An added value of the training was pointing to the University of Silesia's experience in this field and presenting the conclusions of the international GEPARD project (dedicated to equality and diversity policy at universities).

The key takeaways for Participants:

- Understanding of the requirements for legal guarantees of gender equality in the academic environment (particularly regarding funding the R&I area in universities and research units - Horizon Europe).
- Practical knowledge of what a GEP is, what formal requirements it has to meet and what issues/thematic areas it should regulate.

- Familiarity with the electronic toolkit to facilitate the creation of a first or subsequent GEP.
- Awareness of the impact of GEPs on academic reality (based on the USil's own experience and research carried out within GEPARD).

3.1.7 Entrepreneurship

Trainer: Joanna Sróbka, PhD

Date: 31.07.2024

Joanna Sróbka – graduate of the University of Silesia in Katowice, since 2023 PhD in biological sciences. Currently the employee of the Office of Cooperation with the Economy, previously worked in a special purpose vehicle of the University of Silesia, a patent office or a consulting office dealing with writing applications for project funding, mainly for SMEs. She has completed a number of certified trainings, including: Scrum Master I, Prince Foundation, M_o_R Foundation, AgilePM® Foundation and Practitioner as well as many others. Participant of numerous scientific conferences, fairs and business meetings. On a daily basis, she deals with the cooperation of science with the economic environment, mainly in aspects related to the commercialization of the potential of the University of Silesia, raising employees' awareness of the possibilities of commercialization and obtaining financing for the commercialization of research by scientific employees and more.

Subject of the training:

The training focused on the main aspects of the commercialization process and entrepreneurship, mainly at the University of Silesia. Also, the subject of the role of different departments in commercialization and academic entrepreneurship was raised. The most important issues were the type of commercialization, the entrepreneurship support, and the intellectual property protection.

Key takeaways for participants:

- Insight into commercialization and entrepreneurship in Poland, on the example of the University of Silesia.
- Familiarity with ways of commercialization.
- Awareness of the importance of protecting intellectual property.
- Practical examples of the successful and unsuccessful commercialisations
 how it works.
- Overview of tasks and complexity of the services accompanying entrepreneurship and commercialisation in science.

3.2 Description of the change in participants' competencies

The previously described specific group of training sessions was scaffolded according to the competence gaps identified in the T4ERI project as basic indicators of academic challenges. The diverse group was assessed in terms of

these gaps. The exact nominations to individualised training tracks were made and measured through pre-tests conducted for each participant. The overall list of competence gaps indicated through the pre-test analysis followed competencies included in two profiles (1) R1-R2 early researchers and recognized researchers, (2) R3-R4 experienced and leading researchers. After the training sessions participants were invited to self-assess their competences again.

The profile for early-stage researchers (levels R1 and R2) as research team leaders consists of nine competences. The list and definitions of competences included in the profile is shown in the table below.

COMPETENCY	DEFINITION
Assertiveness	Openly expressing one's opinion, feelings, attitudes and beliefs in a way that does not violate other people's rights or prejudice any organisation's interest.
Relationship building	Establishing relationships and building networks of contacts in a diverse environment in order to ensure effectiveness and cooperation.
Drives for results	Striving to achieve the set objectives and improved the process of work. Showing commitment and actively searching for new opportunities and solutions.
Project works	Effective preparation and conducting of project works.
Sharing knowledge and experience	Imparting useful knowledge and sharing experiences with others, which supports realisation of professional tasks.
Innovativeness/ creativity	Creation and effective implementation of the innovative ideas, solutions and concepts.
Communication skills	Effective communication by expressing one's thoughts in such a way that they are understood by recipients, actively listening to other people's utterances.
Strategic orientation / thinking in the long- term perspective	Planning the future actions that have a strategic importance for employee's own work and for the activity of the university.
Cooperation	Establishing and maintaining effective cooperation with other people, based on partnership, in order to achieve the best possible results.

All of the abovementioned competences have been described at five levels of development (see table below) which allows both determination of the desired level of fulfilment and assessment based on the behavioural descriptions.

	LEVEL	DESCRIPTION
1	Lack / weak	Lack of desired behaviour, making mistakes, clear inability to cope with tasks that require a given competence.

2	Basic	Attempting to behave in an expected manner, coping with tasks requiring specific competencies, making mistakes.
3	Good	Independence, proper performance of most tasks requiring a given competence.
4	Expert	Efficient, error-free execution of tasks requiring a given competence, coping also with difficult tasks. Modelling positive behaviour and supporting others in the implementation of tasks related to a given competence
5	Outstanding	Perfect execution of even extremely difficult tasks requiring a given competence. High level of flexibility, showing new behaviours in the field of a given competence, setting trends and trends in this area.

In the final profile for four of these competences, the good level (3) was considered as desirable, and for the remaining ones – the expert level (4).

The profile for the experienced scientists (R3 and R4 levels) acting as research team leaders also consists of nine competences. The list and definitions of competences included in the profile is shown in table below.

COMPETENCY	DEFINITION
Relationship building	Establishing relationships and building networks of contacts in a diverse environment in order to ensure effectiveness and cooperation.
Team building	Creation, integration and organisation of activities of the team and strengthening the potential of individual team members as well as the potential of the whole team.
Drives for results	Striving to achieve the set objectives and improving the process of work. Showing commitment and actively searching for new opportunities and solutions.
Strategic orientation/	Planning the future actions that have a strategic
thinking in the long- term	importance for employee's own work and for the activity
perspective	of the university.
Project works	Effective preparation and conducting of project works.
Innovativeness/creativity	Creation and effective implementation of the innovative
	ideas, solutions and concepts.
Communication skills	Effective communication by expressing one's thoughts in
	such a way that they are understood by recipients,
	actively listening to other people's utterances.
Acquisition of funding	Effective acquisition of funds for research and/or
	implementation activity.
Leadership (scientific	Gathering the right people and building their engagement
leader)	in ideas and concepts.

All of the abovementioned competences have been described at five levels of development (see table 2) which allows both determination of the desired level of fulfilment and assessment based on the behavioural descriptions.

In the final profile for two of these competences, the good level (3) was considered as desirable, for the next six competences - the expert level (4), and for one competence - the outstanding level (5).

3.2.1. Characteristics of participants before the mentoring and training intervention

The Two tables below present the results of all early-stage researchers (R1 and R2) and all experienced researchers (R3 and R4) before the undertaken research mentoring and training sessions. The division includes also the administrative staff, categorised into junior and experienced specialists. The tables show the parameter C – a difference between the self-assessment level and the required level of competences. The bigger the difference (in negative numbers), the more this competence needs to be developed.

		Person in all early-stage researchers (R1 and R2)						
Competence	1	2	3	4	5	6	7	8
Assertiveness	-1,80	-0,40	0,00	-0,60	0,40	-0,80	-1,40	-1,60
Relationships	-0,80	0,00	0,60	0,40	-0,20	0,40	-0,20	-1,20
building								
Drives for	-0,40	-0,60	-0,60	-1,80	0,00	-0,40	-1,00	-1,40
results								
Project activity	0,14	0,43	-0,71	-1,00	0,00	-0,43	-0,14	-0,86
Sharing	-0,25	0,00	0,50	0,25	-0,25	-0,50	0,00	-0,50
knowledge and								
experiences								
Innovation /	-0,40	0,00	-0,40	-0,80	-0,20	-0,80	-0,20	-0,80
Creativity								
Communication	-1,00	-1,20	-0,60	-0,20	-1,00	-0,80	-1,80	-1,40
skills								
Strategic	-1,67	-1,17	-0,83	-1,33	-1,00	-1,33	-1,00	-1,50
orientation /								
thinking in the								
long term								
Cooperation	-0,40	-0,60	-0,80	-1,00	-1,00	-0,40	-1,00	-1,40

Differences between the self-assessment level and the required level of competences for the early-stage research team leaders and the administrative staff (R1-R2)

		Person							
Competence	1	2	3	4	5	6	7	8	9
Relationships	-0,60	_	-	-2,00	-0,80	0,00	-1,40	-1,00	0,40
building		0,40	0,20						
Team building	-0,80	-1,60	0,20	-2,00	-0,40	0,20	-0,40	0,20	_
									0,40
Drives for results	0,60	0,20	1,00	-0,20	0,80	1,60	1,00	0,40	1,00
Strategic orientation /	-0,67	-1,17	-0,33	-1,67	-0,33	0,17	-1,00	-1,00	0,00
thinking in the									
long term									
Project activity	-1,29	-0,86	-0,43	-1,71	-1,00	0,29	-1,71	-1,43	-1,29
Innovation /	-1,00	0,00	0,20	-2,40	-1,00	-0,20	-0,80	-1,60	-1,20
Creativity	1,00	0,00	0,20	2,40	1,00	0,20	0,00	1,00	1,20
Communication	0,40	0,40	1,60	-0,20	0,00	0,40	1,40	0,40	1,00
skills									
Acquisition of	-1,50	-0,67	0,33	-2,17	-1,17	0,00	-1,50	-1,17	-1,67
funding									
Leadership	-2,20	-2,00	-1,40	-3,00	-1,40	-1,40	-0,80	-1,80	-1,40
(scientific									
leader)									

Differences between the self-assessment level and the required level of competences for the experienced researchers and the administrative staff (R3 and R4)

3.2.2. Characteristics of participants after the mentoring and training intervention

The tables below present the results of all early-stage researchers (R1 and R2) and all experienced researchers (R3 and R4) after the training session and international mentoring undertaken within the three partnering universities of the WP3: USil, UA, UNITS. It is shown the difference in parameter A after and before training. Parameter A means a difference between the self-assessment level and the required level of competences. The bigger parameter A is the more development occurred.

	Pers	Person in all early-stage researchers (R1 and R2) – parameter							
		А							
Competence	1	2	3	4	5	6	7	8	
Assertiveness	-	1,20	_	0,40	-0,20	0,80	0,20	1,40	
Relationships	-	1,20	-	0,00	1,00	0,20	0,20	1,40	
building									
Drives for results	-	1,00	_	1,00	0,20	0,40	0,00	1,00	
Project activity	-	1,29	_	0,86	0,43	0,86	0,86	1,29	
Sharing knowledge	-	1,50	-	0,50	0,50	1,75	1,00	1,00	
and experiences									
Innovation /	-	0,80	_	0,80	0,20	1,00	0,20	1,60	
Creativity									
Communication skills	-	0,60	_	0,40	1,00	0,20	0,60	0,40	
Strategic orientation	-	0,83	_	0,83	0,00	0,83	0,00	1,00	
/ thinking in the long									
term									
Cooperation	-	1,20	_	-0,20	0,40	0,80	0,20	0,60	

Differences in parameter A after and before trainings for early-stage researchers and the administrative staff in the post-test (R1 and R2)

	Person in all experienced researchers (R3 and R4) – parameter A								
Competence	1	2	3	4	5	6	7	8	9
Relationships	1,00	0,60	ı	1,00	1,60	ı	1,00	-	0,20
building									
Team building	0,40	1,60	-	1,40	1,20	-	0,20	-	0,40
Drives for results	-0,40	0,80	_	1,00	1,20	-	0,00	-	0,40
Strategic orientation	0,50	1,17	_	1,83	1,00	-	0,67	_	0,33
/ thinking in the long									
term									
Project activity	0,71	0,86	_	1,43	1,86	-	0,57	-	1,29
Innovation /	0,40	-0,20	-	1,60	2,00	-	0,40	-	0,40
Creativity									
Communication	0,00	0,60	-	1,80	1,60	1	0,00	-	0,40
skills									
Acquisition of	0,50	0,67	1	1,83	2,17	1	0,50	-	2,67
funding									
Leadership	0,60	1,00	_	1,60	1,40	-	0,00	-	1,00
(scientific leader)									

Differences in parameter A after and before trainings for experienced researchers and the administrative staff in the post-test (R3 and R4)

To sum up, the study, based on self-assessment at two points in time, before and after training courses and mentoring intervention, confirmed that all the participants improved competencies. There are still some competencies that require further development. In the first group/ cohort of participants (R1-R2)

there is a gap between the expected and the obtained level of competencies: strategic orientation, communication skills, cooperation and drives for results. In the second group/ cohort of participants (R3-R4) there is still a need for improving the competencies: leadership, teambuilding, project activity, innovation and acquisition of funds. Drop out in the post-test study was quite high (23,5%). The main reason for the high dropout rate was largely due to the holiday season and the diverse approaches used to fulfil the programme's requirements. Additionally, some participants did not engage in the mentoring abroad component, which led to a loss of interest in the evaluation process.

3.2.3. Characteristics of participants' performance based on their self-referential diagnosis

All participants recruited for the pilot activities under the Leadership Academy were encouraged to follow their tested nomination in terms of their training, to find by themselves a mentor and then participate in a week of mentoring abroad. In the case of difficulties with the in-person visits, remote consultations and mentoring sessions were also permitted. For four participants, due to objective reasons, the mentoring sessions were not carried out. After completing the Academy, participants were also asked to fill out a self-referential assessment sheet. It covered four diverse areas to complete in an open clause format: the area of development; development goals; training completed; scheduled mentoring sessions; and commitments during the mentoring abroad.

The close reading of participants' self-referential assessments allowed for the identification of several significant elements, which highlight the usefulness of the applied indicators as well as the importance and need of the training sessions.

The first one referred to the mastery of the Open Science practices and data management. By participating in sessions on Open Data, some of them expressed an expansion of their knowledge and developed advanced skills in data management and transparency. This included enhancing their understanding of best practices for the research data sharing.

Second element shows that the participants focused on developing effective leadership skills, including delegation, time management, and strategic decision—making. In relation to this, they gained insights into promoting inclusivity and creating Gender Equality Plans within research environments.

The third issue tackled networking and collaboration. The programme fostered cooperation and networking opportunities, allowing them to establish new scientific connections and common research plans. In the case of two participants, the idea of a joint project and articles was already in the early stages of development like in the example:

"Furthermore, the mentoring sessions have inspired me to conduct some projects to strengthen the relationship between my mentor's institution and mine" (researcher no. 19).

Fourth, professional and research-informed didactic growth was highlighted. The mentorship experience enabled the participants to transform scientific research into the viable business ventures, improve their teaching methods, and utilise AI in their scientific activities.

The participants expressed only positive opinions regarding the training sessions, as illustrated by the following example: "The mentoring stay was a time of very intense expansion of my own knowledge" (researcher no. 18).

From the provided mentoring session abroad, the two most important issues can be highlighted. For the administrative staff: job shadowing and grant management practice – The mentoring visit offered administrative staff the opportunity to observe how the host institution identifies grant opportunities and collaborates in actions related to the project management. The job shadowing experience provided insights into selecting grant topics.

For researchers the most important value was collaboration. The visits focused on helping researchers plan research projects, apply for grants, and establish collaborations both within and outside their universities.

4. Conclusion

As a result of the analyses and series of activities in the project, academic career indicators addressing researchers and administrative staff were applied, based on the division into two groups: R1-R2 and R3-R4. The final pilot activities demonstrated improvement in the missing competencies among all participants who successfully completed the programme focused on working with these indicators. What is interesting on the one hand, the two groups of researchers identified in our study partially overlap with the groups highlighted in the ResearchComp model: The European Competence Framework for Researchers. It appears that those interested in further development can benefit from the tools available on the Euraxess portal. On the other hand, there are many stakeholders who can benefit from the ResearchComp, as a first common language and a common understanding of researchers' transversal competences. Not only universities, and research organisations but also training providers, employers and policy makers can be aware of, implement and monitor researchers' competencies and support the employability and intersectoral mobility of researchers.

The assessment of the Leadership Academy for novice researchers, experienced researchers, and early stage and experienced administrative staff can be approached by evaluating two key dimensions: indicator improvement and participant satisfaction. In terms of indicator improvement, pre- and post-programme tests show noticeable progress in the area of research competencies. Secondly, when considering career progression, in several cases self-assessments showed progress in building the academic portfolios, related to the involvement

in joint publications and collaboration with a mentor. Considering that this was about 12 percent of participants in such a small cohort, the scale of these achievements is significant.

Regarding their satisfaction with the programme, we observe that especially young researchers and early-stage administrative staff feel empowered by the structured leadership development opportunities, which strengthens their confidence in working in an international environment.

 Enhancing the Potential of Young Researchers and Elevating the Status of Administrative Staff

All activities carried out as part of Work Package 3, as defined in the adopted Action Plan, were addressed by the team of three universities in such a way that none of the tasks was omitted. All tasks were completed either in full or in part. Deviations, when they occurred, concerned minor tasks related to the activation of PhD students and stakeholders. On the one hand, the specific nature of stakeholder activities and their relatively low interest in the project surprised the participants. On the other hand, the short time for the pilot, resulting from earlier delays in gathering data from the universities with varied administrative systems, necessitated a partial involvement of HR departments. Ultimately, it turned out that full possibilities for engaging the PhD students and postdocs exist more broadly in the activities of the second phase of the T4EU initiative, both in Work Package 4 T4EU Doctoral Education and Innovative Ecosystems dedicated to the PhD students and in Work Package 5 T4EU Academy for Professional Excellence focused inter alia on young researchers after obtaining their PhD.

5. Appendix

5.1 Forms

5.1.1 Self-Referential Assessment and Individual Development Plan for the T4ERI WP3 Pilot Activities





Transform 4 European Research and Innovation (T4ERI)

Project No. 101035805

Self-Referential Assessment and Individual Development Plan for the T4ERI WP3 Pilot Activities

Name: [Add full name of participant]

Program: T4ERI Leadership Academy

Strengths: [Please create a list of strengths of your participation in the T4ERI WP3 Pilot, max 600 characters]

Areas for Development: [Please explain how the T4ERI WP3 Pilot has helped you develop as an employee, max 600 characters]

Development Goals:

[Please enumerate below the activities you have undertaken within the training and mentoring sessions]

Trainings Completed:

[Please list the trainings you undertaken]

- 1.
- 2.
- 3.

1. 2. 3.
4. Commitments during the mentoring abroad [Please summarise and describe briefly your stay abroad under the framework of individual mentoring]
Participant's Signature:
Date:
5.1.2 Program Report
TRANSFORM 4EUROPE This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101035808
Transform 4 European Research and Innovation (T4ERI) Project No. 101035805
Programme Report
Name: [Full Name of Participant]
Date: [Programme End Date]
Program: T4ERI Leadership Academy
1. Training Participation

Completed Training: [Completed training name]

Key Skills Acquired: [Description of acquired skills]

Completed Training: [Completed training name]

Key Skills Acquired: [Description of acquired skills]

Completed Trainings: [Completed training name] **Key Skills Acquired:** [Description of acquired skills]

2. Mentoring Sessions Participation

Conducted Session: [Session date]

Main Insights from Mentoring: [Description of insights]

Conducted Sessions: [Session date]

Main Insights from Mentoring: [Description of insights]

Conducted Sessions: [Session date]

Main Insights from Mentoring: [Description of insights]

3. Achievement of Development Goals

Progress Evaluation: [Description of how goals were achieved]

4. Post-Test Results

Competence Balance after Completing the Program: [Description]

5. Conclusions and Recommendations for the Future

Summary of Experiences: [Description]
Recommendations for Future Participants: [Description]
Participant's Signature:
Date: