

Quadultrainers

Synthesis of Advisory Board and Concertation Seminar

Rome 23-24 March 09



Education and Culture DG

Lifelong Learning Programme

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European Lifelong Learning Programme - Multilateral Project

QUADULTRAINERS ***Towards a European Qualification Prototype for Adults Trainers***

Advisory Board Meeting and “Concertation Seminar”

Rome, 23rd-24th March 2009

c/o ABI (Italian Banking Association), Via Botteghe Oscure 46

Introduction

In the present paper you will find –merged into an only document- the reports from the Project Partners Meeting with the Project Advisory Board Members and the Parallel Session Reports from the Concertation Seminar held in Rome respectively on 23rd and 24th March 2009. The Concertation Seminar, in particular, represents a fundamental step foreseen in Project Workpackage 1 (“Awareness raising and Network building”).

As it is shown as follows, the meeting with the Advisory Board gave to the Partners clear and enlightening indications upon the crucial topics which are at the basis of the Project reasons and aims.

At the same time, the Concertation Seminar, participated by a qualified audience of experts, trainers and consultants, and representatives of institutional and social bodies –operating in the banking and financial sector as well as in other relevant professional fields-, gave to the Project Partners an important opportunity of dialogue and exchange of knowledge and experiences. The professional network that has been set up in Rome will now contribute – also as an enlarged virtual community- to the success of the future phases of the Project, on which the Partners are working on at the moment.

July 2009

REPORT FROM PARTNERS/ADVISORY BOARD MEETING

Mr. Mario Spatafora, **EBTN Asbl**

Mr. Johan Van Den Den Branden, **FEBELFIN**

Mr. Walter Kugemann, **Friedrich-Alexander-Universität Erlangen-Nurnberg**

Mr. Erwin Seyfried, **HWR Berlin**

Ms. Ana Barros, **IFB**

Claudia Montedoro, **ISFOL**

Mr. William Portelli, **Malta Union of Bank Employees**

Mr. Guus De Jonge, **NIBE**

Mr. Claudio Dondi, **SCIENTER**

Ms. Emilia Barone, **SCIENTER**

Mrs. Cristina Bertuzzi, **SSPA**

Eileen Lübcke, **Universität Bremen - Institut Technik & Bildung**

Issues presented from Project Partners to Advisory Board members

- Info on existing qualification systems at EU level
- Advice on Setting up the Competency Framework and Prototype (useful criteria)
- Advise on setting up the community for dissemination and valorisation

Excerpts from A.B. members' interventions

William Portelli

We have to try to have standards and benchmark in the financial sector and in other sectors that consider also specificities of different countries.

There is a need for a “Multiarea/Multitraining” certification

Because we often talk of different trainers we should identify “Career paths” to identify trainers. It is not simple but one crucial question remains: “which competencies make a content expert a good trainer?”

Cristina Bertuzzi

We have to embed innovation in regulatory systems (in order to have a dynamic and not a static picture).

It is important to consider criteria for assessment of competencies descending from different bodies, external or internal.

In any case, competencies assessed by any “authority” and “self-evaluation” of competencies seems to be opposite existing tendencies.

On this point she quoted as an example an UNDESA/IASIA project on the topic “Standards of Excellence” -in which she has been involved- aimed to define flexible models for “self-evaluation” of “organisational development” tailored for organisations (Schools of Public Administration, Universities etc. providing training activities for Public Administrations) that take into account cultural sensitiveness and also countries’ peculiarities.

She also stressed the need to make efforts in order to have a common terminology and the importance to consider also what is happening in this field at the European level in the Public Sector.

She does not believe that the opposition full time/part time trainer is the real problem.

The fundamental issue is the “learning project/design/management” skills (linkage of different processes, settings; how to integrate the competencies of content experts with the experts of methodologies, etc.)

Claudia Montedoro

It has to be considered European experience on the integration between formal/non formal/informal learning.

She quoted an experimental project run by Isfol together with Universities of Padua and Turin on the search of coherence and integration between “academic standards” (competency as recognized by universities) and “professional expertise”.

At the light of rapid changing of the profession, we should focus on competencies instead of regulations.

Aida Maisano

We should focus on the so-called “Learning Revolution” which implies new professional roles, especially in the e-learning sector (content tutor, process tutor, e-learning platform manager, e-learning content manager, etc.). Special attention should be devoted to other crucial topics like the “blending” of methodologies, macro-design process/skills, evaluation of training results.

More and more urgent and important is the integration between training/ICT knowledge and management competencies.

Walter Krugemann

We have to define appropriate criteria for regulations/certification systems.

We need a reference framework.

But we should have more clarity on some preliminary questions:

- Who is the subject of learning? Society? Training agencies? Companies? Individuals?
- Relevance of regulations: which regulations could be useful for the market?
- What do we mean with “certification”? of Performances? Or Results?
- Who is the “owner” of the learning process? And of competencies? And of regulation processes?

There is no contradiction between a (better) competency regulation and (more) competition in the market. But we need regulations that are functional and flexible in the view of a changing environment.

We should define “clusters” and try to find synergies between different types of learning actors as well as different learners.

There is a need of “new competencies”: for instance a “diagnostic sensitiveness” for content experts to say to learners what they need (today and tomorrow) also in terms of motivation/attitudes/values and to identify learning bridges and missing elements. He referred to the “Humboldt model” with young students well trained to replace old professors.

Eileen Lübcke

She quotes other European Projects like Eurotrainers and the current research on the impact of global dynamics (globalisation, demographic changes, impact of technologies, mobility processes etc.) on the trainers’ role. Nowadays we have a “blurred” concept of training/trainer. We have teachers, professional experts (who have no specific training skills), training consultant, managers, etc. And we have more and more specific professional roles (facilitators, mentors, coaches, counsellors etc, most of them operating in the workplace).

We need to identify a set of commitments for the “personal development” of trainers.

We need to have certifications which are not merely formal but rooted in professional community.

Many experts are not at all interested in trainers’ career paths. But in some sectors expectations can raise where professional career is linked to training expertise.

Erwin Seyfried

We have to provide in regulation systems revision mechanisms as it happens in Quality systems and processes.

The level of specialization in the profession is increasing and we should focus target groups but also the “part-time” trainers and the experts (no formal trainers).

“Concertation Seminar” - Parallel Sessions Report

Group A: Certification

Participants:

Elisa Isacco, Corrado Iannucci e Teresa Talarico (**ABIFORMAZIONE-Rome**) (I)

Pier Sergio Caltabiano, Sergio Di Giorgi (**AIF-Associazione Italiana Formatori**) (I)

Loris Brizio, Franco Savi, Artusio Laura, Rizzardi Fulvio (**FABI-Indipendent Union of Bank Employee**) (I)

Johan Van Den Branden (**FEBELFIN ACADEMY**) (BE)

Ana Barros **INSTITUTO de FORMAÇÃO BANCÁRIA– IFB** (P)

Guus De Jonge **NIBE – SVV BV** (NL)

Cristina Bertuzzi (**SSPA - Scuola Superiore della Pubblica Amministrazione**) (I)

Pierangelo Pagella (**Unicredit Group- Lifelong Learning Center**) (I)

Rapporteur: Sergio Di Giorgi

Participants to the discussion group were invited to briefly introduce themselves. Soon after, a freewheeling discussion took place among all of them about questions/themes enlisted in the Scierter Report and illustrated to the plenary session.

Questions/Themes from Plenary Session:

1. 1a. How regulated should the Adult Trainers profession be?
 - 1b. Who is in charge to regulate?
 - 1c. Is there a (common) career path?
2. Which competencies make a content expert a good trainer for workers?
3. European framework vs National/Sectorial specificities.

Question 1

It was a multiple question.

As a matter of fact, some of the participants (also referring to some “provocative” inputs from the plenary session) argued upon the “necessity” of regulations (in that sense, question 1a should be reformulated as: “*Why and How should the A.T. Profession be regulated?*”).

On this point, despite slight differences of vision among participants, a general consensus seemed to be reached -for the Financial and Banking Sector (FBS) as well as for the other Sectors’/Institutions representatives- in the following statement: “to create more value by improving the quality of training as a guarantee factor for all the stakeholders”. Moreover, FBS representatives pointed out that their sector seems to be more accountable than others (also in terms of results); so, trainers in that sector should be more accountable than in other economic sectors.

At the same time, a general agreement has emerged about the fact that all the stakeholders represented at the Seminar could be in charge (legitimated) of the regulation process.

More specifically, regarding the regulation process, the discussion pointed out that nowadays there are two main different typologies of regulations, descending from different regulatory bodies/entities (professional, institutional, lead bodies, etc.; see also Scierter Report):

- one is more Content/Profiles/Roles-related, used also for “entry level” qualification (it is a quantitative approach, based on requirements/exams)
- the other is more Design/Process-related (it is a qualitative approach)

It was also pointed out how difficult is to put together the need of regulation on one hand and, on the other hand, the continuous change of boundaries and competencies required for the A.T. profession.

For some participants, regulations should not give static pictures but should dynamically include innovation in their systems/processes. Moreover, there is a big difference between to set up (rigid) regulatory systems or to set up more flexible Competency Framework, models and standards to classify competencies of trainers.

It has been also stressed by some participants that not all the aspects of A.T. profession can be regulated.

A part from this, regulations could be seen in a double perspective (and with two different aims):

- as a way to compare different training systems
- as a mean to compare the competencies of the professionals, helping them to shift from a level to another

There was also a general agreement on the fact that there was no common career path for European trainers.

It was stressed the huge and growing number of part-time trainers (who represents a special target the “Quadultrainer Project” wants to deal with) as well as the substantial difference between the regulation systems for professional trainers and those that could be applied for by people who want to become professional trainers.

Question 2

A common agreement was shared on the fact that trainers’ work is to develop people and their potentialities and that “train the trainers” means to develop people who already are or want to become professional trainers.

Not the same consensus was reached in defining what is the useful knowledge that trainers should develop in order to be more effective: specialistic knowledge? Communication skills? How to implement/adapt knowledge to the daily working routine? Or, in other terms, “who could be considered the best trainer?” (The content expert? One who is expert in communication?).

To answer to this questions, as it was observed, different models/approach could be considered upon. For instance, PNL offers models and tools to analyse the experience of the trainees as well as of the trainers. Or, indoor and outdoor training could be evaluated according to very different criteria.

Despite of the speed of change dynamics around the profession, regulations should be addressed first of all to the most common professional profiles.

Question 3

National Professional Association can be very useful in support and promote regulation systems/processes.

On one hand, qualifications and regulations should go beyond national/sectoral level. At the same time, seems to be still a strong demand toward specific sectoral regulations (and also sectoral “Codes of Conduct”). Anyhow, models should be compared in an European perspective.

In any case, these systems/processes should be aware of the market/clients needs and level of expectations.

Group B: Change factors, implications for adult trainers competences and integration of formal, non-formal and informal learning

Participants:

Francesco Rinaldi, **EBTN**

Massimo Fattorini, **ENBICREDITO**

Erwin Seyfried, **FHVR**

Lauria Laura, **Fideuram**

Walter Kugemann, **ILI-FIM**

Claudia Montedoro, **ISFOL**

Cristina Porcarelli, **ISFOL**

Emilia Barone, **SCIENTER**

Claudio Dondi, **SCIENTER**

Monica Turrini, **SCIENTER**

Cristina Bertuzzi, **SSPA**

Eileen Lübcke, **Universität Bremen - Institut Technik & Bildung**

Rapporteur: Claudio Dondi

The session addressed the 3 questions in the following order implication of learning outcomes “revolution” on adult trainers qualification:

- 1) What are the most important change factors and new competences required in the professional A.T. qualification?
- 2) Integrating formal – non formal – informal learning: how is it possible?

3) Learning outcomes revolution: implications on A.T profession requirements?

The very interesting case of SPF on-line and its development in Higher Education was presented by Claudia Montedoro (ISFOL) as an example of integrated approach to the recognition of learning outcomes developed through a combination of work experience, classroom teaching by Italian Universities and competence-based eLearning available through the SPF on line system.

The experience is directly related to the recently introduced qualification requirements for VET teachers and trainers, and its multiplication potential was appreciated by the Group participants.

The discussion then moved towards the identification of the most relevant change factors for the professions of adult trainers, and on the other hand the impact/consequences expected on trainers.

The first change factor discussed was the Acknowledgement of prior learning achievement, a professional requirement that is often assigned to trainers, mostly without adequate preparation. While acknowledgement of knowledge and “hard skills” seems to be a reasonable challenge the acknowledgement of “soft skills” poses serious problems in guaranteeing an acceptable level of objectivity. Trainers must therefore get prepared to know how to identify key performance indicators and observe/measure them.

However challenging this new competence of trainers may be, everybody in the group recognised it is essential in order to support the motivation of adult learners.

The second factor of change identified was globalisation and its implications on organisational structure of banks and other organisations: this requires trainers to develop further a “research approach” to face complexity and to develop new competences in the field of inter-cultural communication but also evaluation of human resources (it was rather proposed in the session to use “human beings” instead of “human resources”), making clear

that design, support, evaluation functions are becoming much more important –for the “professional” trainers of adults- than the classic teaching function.

The third change factor, if it can be called like this, is the increasing speed of our society, and the amount of anxiety that this speed produces on a large part of employees, including trainers themselves. Again the need is to stress the value of support and empathy in the spectrum of trainers qualification requirements: “in order to be a trainer you must be interested in human beings” was one of the memorable sentences of this session.

Finally the issue of integration among formal, non-formal and informal learning was addressed, and some specific methods were proposed to guarantee this integration (preparing and discussing “real cases” from the working practice, mentoring, briefing and e-briefing, project work combined with “thick”, communication-rich, eLearning).

The need was to identified the points of contact between the “academic way” of teaching discipline-based content and the “world-of-work” way of training to perform specific and more general tasks.

These “points of contact” may represent the “foci” from were to start the integration process.

Finally the value of inter-organisational learning networks was agreed by the participants, and the potential of ICT to support informal learning was recognised: both considerations have implementations on the adult trainers professional requirements.

Conclusions

The Concertation Seminar brought to a very intense and profitable discussion which confirmed the necessity of a Competence framework in the area of training, and in the specific case of the project in the Banking sector.

The necessity of assessing non-formal/informal learning, to have a regulating and yet flexible competence framework motivates the development of a prototype that could take into consideration two profiles, hypothetically a part-time trainer and a full-time training specialist/manager in the Banking sector.

The prototypes will be developed by the partnership analysing existing qualifications and integrating what emerged to be the need of the sector and of the training profiles as new competence development. It is important to integrate different factors: prior learning, organisational structure and non-formal/informal learning in order to have a complete training model profile, replicable in Europe and in multiple organisational structures of the Banking sector.

The Concertation Seminar ended with the a good level of consensus and support from all the participants for the future development of the project Quadultrainers.

Annex I

Presentation of results and matrix

SCIENTER



Presentation of results and matrix

Meeting Rome 24 March 09

Edited by Scierter - draft version 20/03/09

WP 1 Open review and comparative analysis of existing qualifications and competence framework (1/2)

Aims:

- to review existing research on qualification and competence frameworks for trainers and adults
- to compare existing qualifications, profiles and competence frameworks

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WP 1 Open review and comparative analysis of existing qualifications and competence framework (2/2)

Aims:

- to identify change drivers for competence requirements of facilitators of adults learning
- to propose the conceptual framework for a new qualification model (to be developed in subsequent WPs)

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Main questions (1/2)

Main research questions to be addressed:

- what are the main issues discussed in state of art research on adult learning and competences for their trainers and facilitators
- what definition of the field of analysis is relevant at this point in time?
- what qualifications exist for adults trainers and facilitators?

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Main questions (2/2)

Main research questions to be addressed:

- are these qualifications regulated? How (legal, professional, academic, administrative accreditation)?
- how successful are these qualifications in terms of numbers?
- are certificates provided by these organisations which also provide training/education?
- who are the main actors in the field?

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Results – (Febelfin)

- Questionnaire: 13 participating Banking Institutes (Belgium, Cyprus, Finland, Hungary, Italy, Netherlands, Poland, Portugal, Scotland, Spain, Switzerland)

Question	Origin of Trainers	Formal Regulation	Pressure towards regulation	Sector Accreditation / qualification	Main competences	Measurement
Response	Professional trainers (± 20%)	25% regulated	50% sector initiatives - 25% formal regulation	58% formal accreditation	<ul style="list-style-type: none"> • training experience • presentation skills • communication skills 	<ul style="list-style-type: none"> • Entry training • Participants questionnaires (52%)
	Finance Experts (80%)	75% no formal regulation	25% no pressure	42% no, or informal accreditation	<ul style="list-style-type: none"> • didactic skills • Technical expertise (<x years) 	<ul style="list-style-type: none"> • Examination results • Observation

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Profiles and process starting point Nov 2008

PROFILES

- "Classroom" Teacher
(content Expert) Designer/
Planner
- Training Project Manager
- Centre / Function Manager
- Trainer of Trainers
- E-tutor (Coach / Tutor /
Mentor)
- Counselling
- Trans – cultural

PROCESSES

- Diagnosis
- Design
- Delivery
- Evaluation and
Monitoring
- Marketing
- Quality and Research
- Coordination and
Management
- Administration
- Support / Personalise

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The processes/profiles matrix

- The matrix we present you can be used to
serve 2 different objectives:
 - Mapping and matching the profiles and working
processes that are acted in the training sector =>
How it is observable
 - Defining the competences that are needed and
therefore aimed to be developed through training.
=> **How it should be**

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Certified Competence framework (1/3)

Overview of the Competence Area or Profile

This template may be used for a Competence Area (e.g. Compliance), with several possible roles, or to a specific profile (e.g. Compliance Officer).

In the latter case, please specify the recommended EQF level recommended

Overall introduction to the Competence Area and/or Profile

COMPETENCE ROLE: [Please insert Title (e.g. Compliance Officer)] [if applicable, allocate an EQF Level]

Core Competences, articulated in Elements of Competence

Competence 1. [please insert competence]

1. Element of competence 1
2. Element of competence 2
3. Element of competence 3
4. ...

Competence 2. [please insert competence]

Competence 3. [please insert competence]

Competence 3. [please insert competence]

...

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Certified Competence framework (2/3)

TEMPLATE STRUCTURE [please duplicate this template for each competence analysed]

Name of the competence: [please insert here the competences names as listed in Competence description] [if applicable, refer to level C sectorial competence what does it mean]

Please position the red circle upon the section to which the competence refers to.

Elements of competence [an element is a component of the competence, it is the building block of the competence: identifying the elements that composes the competence, helps in providing the description of that. Normally the ideal number of elements to be identified is between 3 and 8]

- ...
- ...



Please breakdown the competence description in the following section (the breakdown in knowledge/skills/attitude is easier if done following the list of the identified elements of competence). Please note that the sector specific and country specific elements are not compulsory, but available if needed.

knowledge	Skills	Attitudes
processes and general concepts, in a	<i>[domain of skills]</i> [Cognitive and practical skills required to accomplish tasks and solve problems by selecting and applying basic methods, tools, materials and information]	<i>[domain of behaviours and attitudes]</i> [Take responsibility for completion of tasks in work or study adapt own behaviour to circumstances in solving problems]

Competence Description Updating Requirement: [please note that this part is for those experts who define the competence description. It does not refer to the validity of the Certificate for the applicant. Only choose one of the following levels; add notes if you think something relevant should be underlined]

Level 1	Needs to be reviewed every 5 years	
Level 2	Needs to be reviewed every 3 years	
Level 3	Needs to be reviewed every year	

Sector specific elements	Context specific elements
<i>[but it is available if additional elements of knowledge, skills or those specified in the previous columns are required. When the to FSS sector specifications. If the formers are already FSS specific; urance or other financial services]</i>	<i>[Specific elements of context affecting knowledge, skills and/or attitudes. This area does not need to be filled but is available to organisations in order to customise competence description to fit the culture and needs of the specific organisation]</i>

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Certified Competence framework (3/3)

[For each core competence identified above, please fill in the table below an duplicate it for each core competence] E.g. Competence 1: Identify compliance implications of rules, regulations and legislature for the business				
PERFORMANCE DESCRIPTION				
The candidate is able to	Key activities	Key Performance Indicators	Type of competence	
	<i>[Please insert the key activities relative to the role. See example below]</i> <ul style="list-style-type: none"> • Identify all laws, regulations and rules relevant for the business of your organisation, including the adopted Code of Ethics and corporate culture • Monitor the regulatory environment: monitor upcoming new rules and legislature, both at European and national level, that might be relevant for the business of your organisation • Identify the implications of regulation and legislation for the business • Advise on the regulatory implications of business strategies 	<ul style="list-style-type: none"> - <i>[Please what are considered the best performances for those activities]</i> - Knows where to find needed information quickly - Has a good grasp of the goals and mechanics of the business - Refers to expert advice where needed 	<i>[Insert if the competence is referred to the specificity of the sector or if it is a transversal competence valid for all sectors]</i>	
Description updating requirement	<i>[Please insert the obsolescence of the description and how often it needs to be updated. E.g. Every year]</i>			
Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<i>[Please insert all relevant knowledge required to perform]</i> <ul style="list-style-type: none"> - The Organisation's own rules, procedures and codes of conducts, including Code of Ethics - The business strategies, policies and models of the organisation - Products and services offered by the organisation - Internal control systems and processes; 	<i>[Please insert all relevant practical skills required to perform]</i> <ul style="list-style-type: none"> - Presentation skills - Analytical skills - Computer skills - Report writing skills - Ability to synthesize based on analysis 	<i>[Please insert behavioural and personality traits]</i> <ul style="list-style-type: none"> - Integrity - Accountability - Autonomy - Transparency - Inclusiveness - Initiative - Service orientation 	<i>[This box does not need to be filled, but it is available if additional elements of knowledge, skills or attitudes that connote those specified in the previous columns are required. When the formers are general, it may refer to FSS sector specifications. If the formers are already FSS specific, it may mean specific to bank, insurance or other financial services]</i>	<i>[Specific elements of context affecting knowledge, skills and/or attitudes. This area does not need to be filled but is available to organisations in order to customise competence description to fit the culture and needs of the specific organisation]</i>

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Possible questions for the Concertation Seminar

- How regulated should the Adult Trainers professional be? Is there a career path?
- What are the most important change factors and new competences required in the professional A.T. qualification?
- Which competences make a content expert a good trainer for workers?
- Integrating formal – non formal – informal learning: how is it possible?
- Learning outcomes revolution: implications on A.T. profession requirements?
- European framework vs. National / Sectoral specificities

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Annex II

Evaluation Plan

FHVR Berlin

THE QUADULTRAINERS EVALUATION PLAN

Proposal by FHVR Berlin

QUADULTRAINERS Evaluation Plan

Basic assumptions

- Support for the achievement of project objectives
- Evaluation of processes as well as results
- Benefit from the expertise of the Advisory Board members
- Evaluation in adequate relation to the volume of the workpackages

QUADULTRAINERS Evaluation Plan (1)

Review and assurance of project progress

- Definition of milestones for the implementation of the project and control of compliance
- Preparation of a clearly represented project scheme
- Check of milestones and deadlines as constant items on the agenda of the project meetings
- Mail to all partners in due time in advance of important deadlines

QUADULTRAINERS Evaluation Plan (2)

Assessment of processes and results

- Assessment of the projects' processes and results through all partners by means of a standardized questionnaire at the end of each meeting, e.g.
 - Appropriate project progress
 - Adequate allocation of tasks
 - Assessment of the output
 - Suggestions for improvement
- Interpretation of results: FHVR, short summary of results at every meeting

QUADULTRAINERS Evaluation Plan (3)

Evaluation by Advisory Board

- Guidelines for the Advisory Board to evaluate the European Qualification Prototype at the second meeting
 - applicability
 - coverage of the relevant areas
 - assessment of the output
 - suggestions/amendments
- Summary of the group discussion at the meeting: NN
- Approval of the summary (presenting the results of the assessment) by the members of the Advisory Board

QUADULTRAINERS Evaluation Plan (4)

Evaluation of the piloting

- Guidelines for the expert discussion within the framework of piloting in 5 countries
 - Standards and qualification framework being applied
 - Applicability of European standards
 - Differences between big and small enterprises
 - Differences between areas of training (initial/continuous VET, further education, sectoral training, adult education in general)
 - Interest in certification
- Minutes of the expert discussion: project partners in the piloting countries
- Analysis of piloting: Scierter