

Competence certification framework new qualification and assessment toolkit after validation

Edited by SCIENTER with the contribution of AIF, IFB

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1. COMPETENCE CERTIFICATION FRAMEWORK¹

1.1 Introduction

This document aims at illustrating a Competence Framework prototype for the definition and development of professional profiles related to adult learning support/facilitation of the Financial Service Sector and, in particular, experimenting its application within the QUADULTRAINERS project. The partners will apply, pilot, revise and fine-tune the competence framework proposed which will bring to a clear definition of two Adult trainers profiles, identified as relevant within the training departments of the financial sector, as well as applicable -within a broader and general perspective- in different organizational contexts: Adult Learning Professional and the Expert Adult trainer.

The Qualification Framework is composed of three main sections:

1. the heuristic/diagnostic approach, proposed for intuitive communication on general characteristics of profiles and core competences, also useful for self assessment, diagnostic of learning needs and planning professional development
2. the systemic mapping directly referring to the most common working processes in the development/support/facilitation of adults' learning. This tool is essential to specify job requirements and competences to be developed
3. the descriptive profile that is the direct operational tool to design training programmes and assessment in view of a precise descriptions of all learning outcomes required and key performance indicators related to each profile and core competence

All partners will take part into the piloting and validation process in order to identify criticalities, insert elements of improvement and innovation and ensure that the final output will fully correspond to the expectations and needs of the Financial sector, as well of other economic sectors.

1.2 Overview of the framework and its use

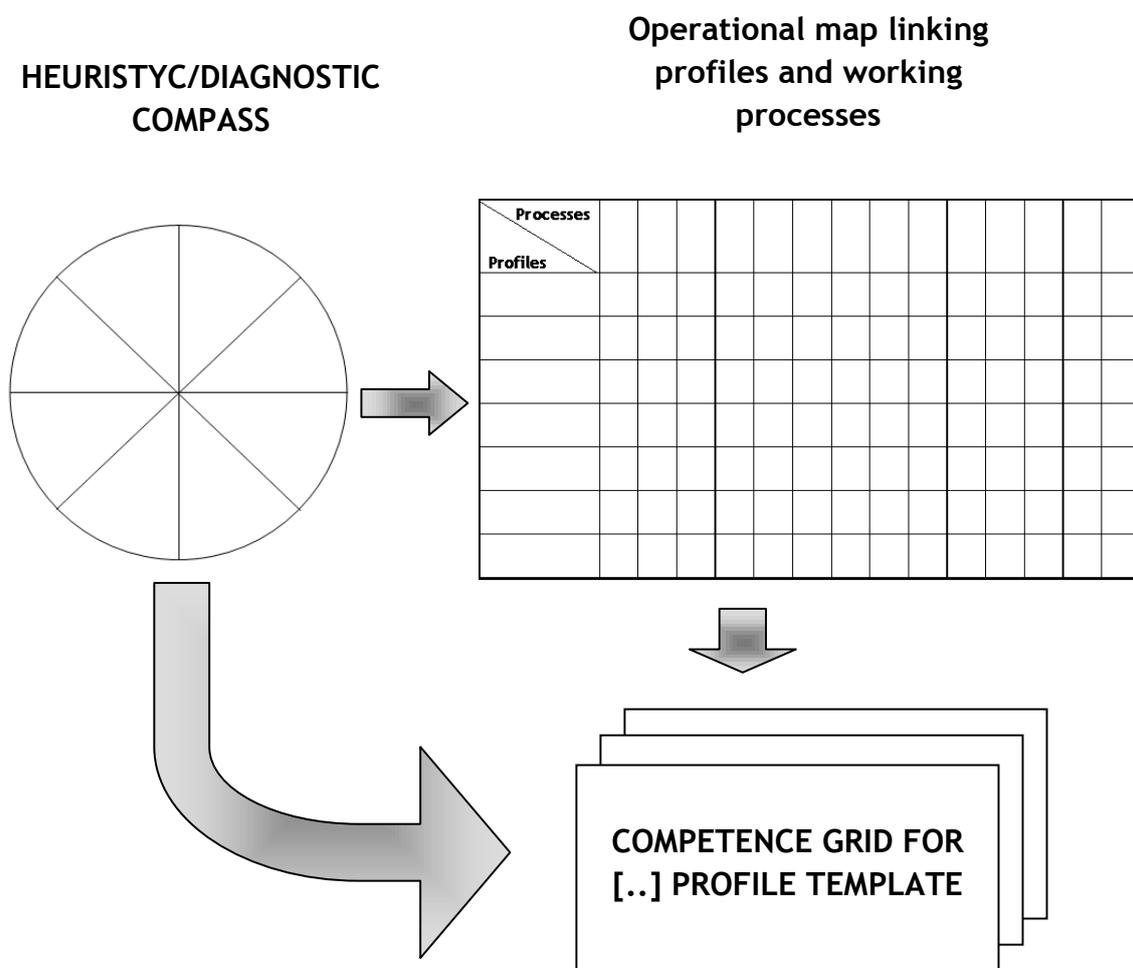
Starting with the heuristic/diagnostic map (table 1) we propose an assessment tool to autonomously evaluate one's competences and that gives a rough yet immediate indication of the competence profile areas of expertise/intervention.

¹ Contents developed by SCIENTER

The second step is represented by the systemic mapping (table 2), which will help identifying and cross matching the processes and the competences that determine and are consistently applicable to the 2 abovementioned selected profile.

Finally, through the competence grid (table 3) we acquire a more profound understanding of the elements which are concurring to compose the 2 profiles through the identification -for each of the profiles- of the specific core-competences (and core attitudes) and the subsequent detailed analysis of each core competence with a clear distinction of the differences, as already effectively experimented within the frame of the CERTIFIED Project.

The following graph explains how the tools are linked in the process for the definition of competences.



As you can see the process proposed is composed of three main phases:

1. the diagnostic/heuristic compass helps to have a rough but immediate indication of where a profile and/or a competence is oriented;
2. the systemic mapping helps define how processes and profiles are linked;

- in the COMPETENCE GRID FOR [...] PROFILE TEMPLATE, the competences identified for each of the 2 selected profiles will be articulated in details.

The proposed tools can be used in a single process, linked among each other, or independently, depending on the objectives of the diagnosis pursued.

1.3 Heuristic/diagnostic compass

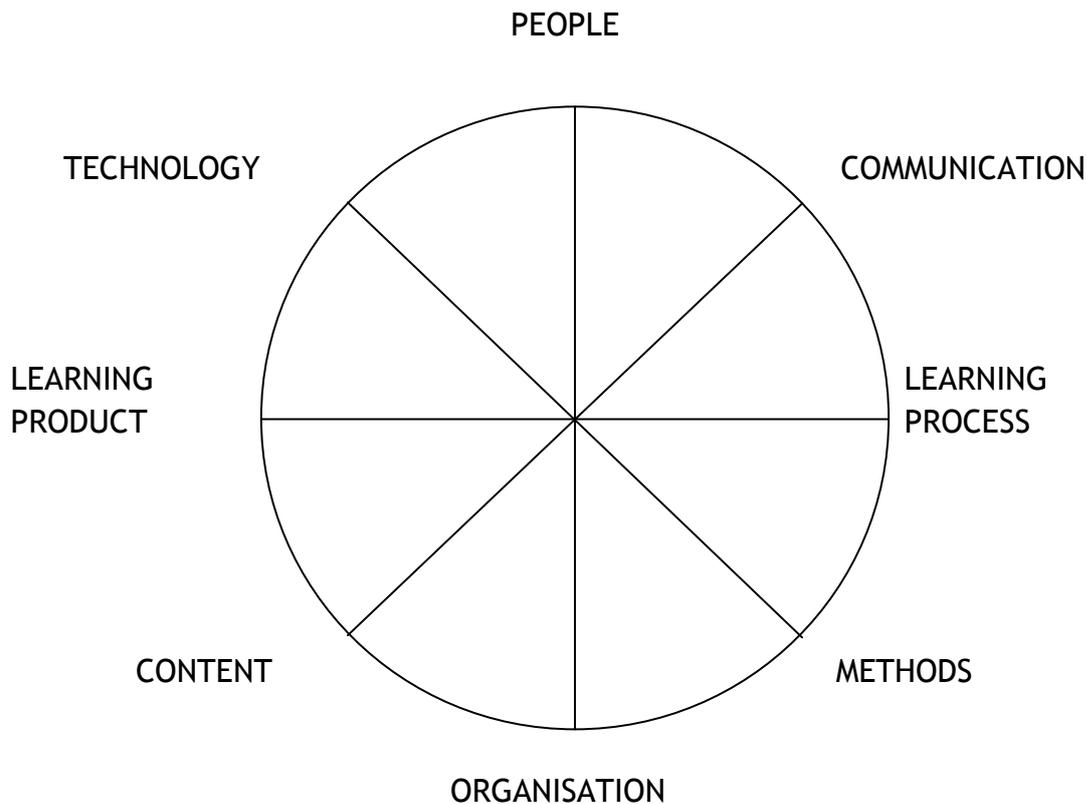


Table 1

With the heuristic/diagnostic approach we propose a methodology and tool that helps the candidate for self assessment to have a real image in where he/she stands in terms of competences already acquired and the ones he/she needs to reach the desired professional profile.

The compass is divided into 8 axis. The end of the axis are in a dialectical relation:

- people: establishing a positive dialogue and relation with learners and adapting the learning process to individual learning preferences,
- communication: clearly illustrating concepts and processes, providing support , facilitating and encouraging the learning process. Managing and valorizing social and cultural diversity,

3. learning process: designing, preparing, developing and evaluating specific learning processes,
4. methods: using and combining different training methods according to learning objectives, learner's characters and learning operational contexts,
5. organization: understanding the organizational aims and uses on training and implementing training/learning activities with a focus on organizational relevance,
6. learning content: mastering a certain scientific, technical or/and technological area/content,
7. learning product: preparing an own learning product meaning, both learning resources, lectures, exercise, tests, seminars and activities such as a project work,
8. technology: managing technology and integrating it in the learning process.

Each of these axis are replicable in all professional context and sectors and the compass can be used to assess both profiles and singular competences.

All the 8 axes identify specific but inter-related variables that are all relevant for the training profession. The two main axes are the vertical one (People *versus* Organisation) and the horizontal one (Product *versus* Process) and they want to stress the two main "polarities" in terms of awareness of organizational or individual needs and perspectives in the first case, and in terms of the different awareness to be devoted to sector/role specificities or to "transversal skills" and "customisation" in the second case.

Of course, as they are all inter-related, different professional profiles show different "orientations" and have to take into account distinct "specific weights" of each different axis in their professional actions and attitudes.

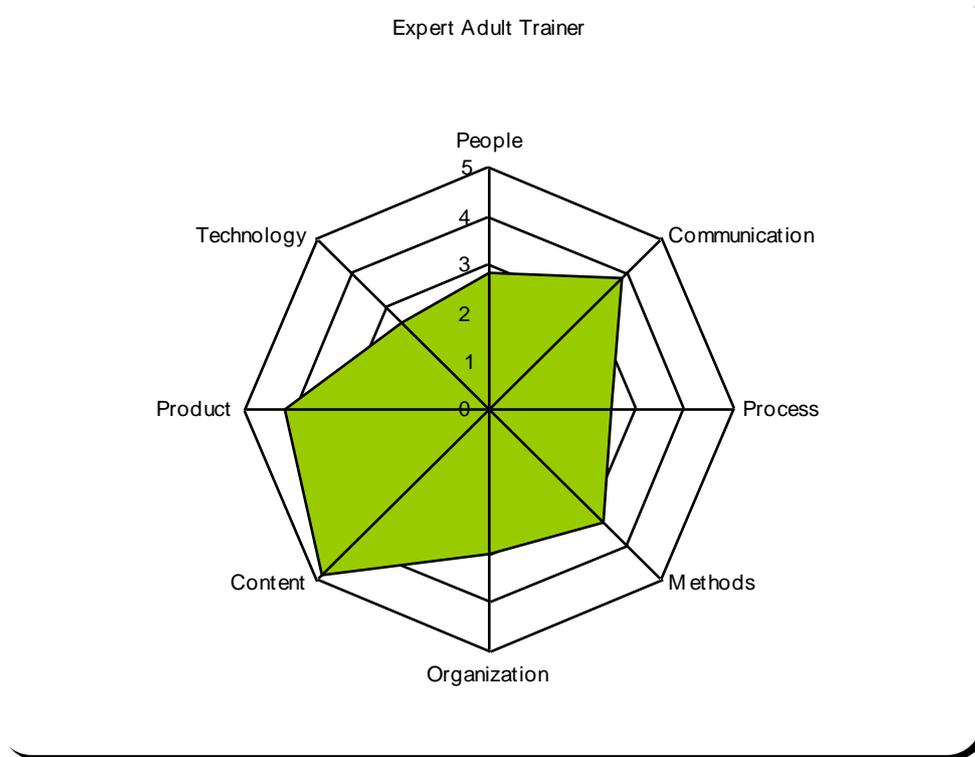
Here follows the representation of the two profiles selected by the Quadultrainers Projects according to the heuristic mapping tool.

1.3.1 Example of application of the heuristic/diagnostic compass

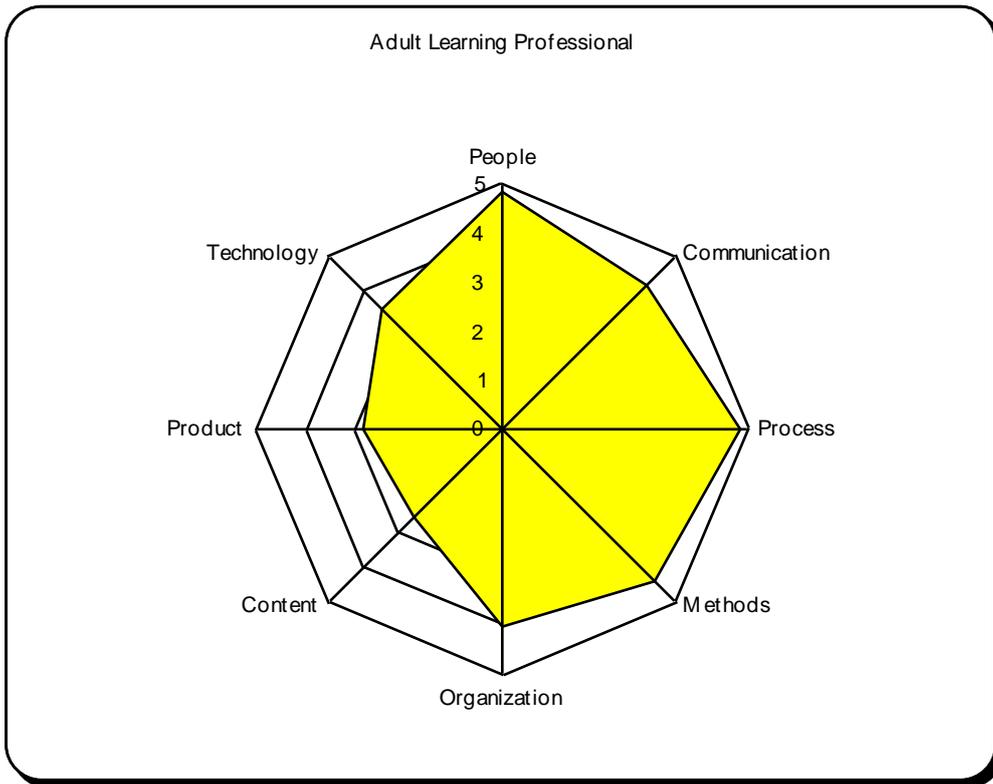
The graphs shown below, elaborated after a consultation with the project partners and a cluster of professionals who were asked to indicate the importance of the 8 axes according to the 2 pilot profiles selected, the Expert Adult trainer and the Adult Learning professional, demonstrate the different orientations for the 2 profiles.

A strong orientation to Product, Communication and Content for the first Profile EAT; a strong orientation to all the other 6 axes for the second profile ALP.

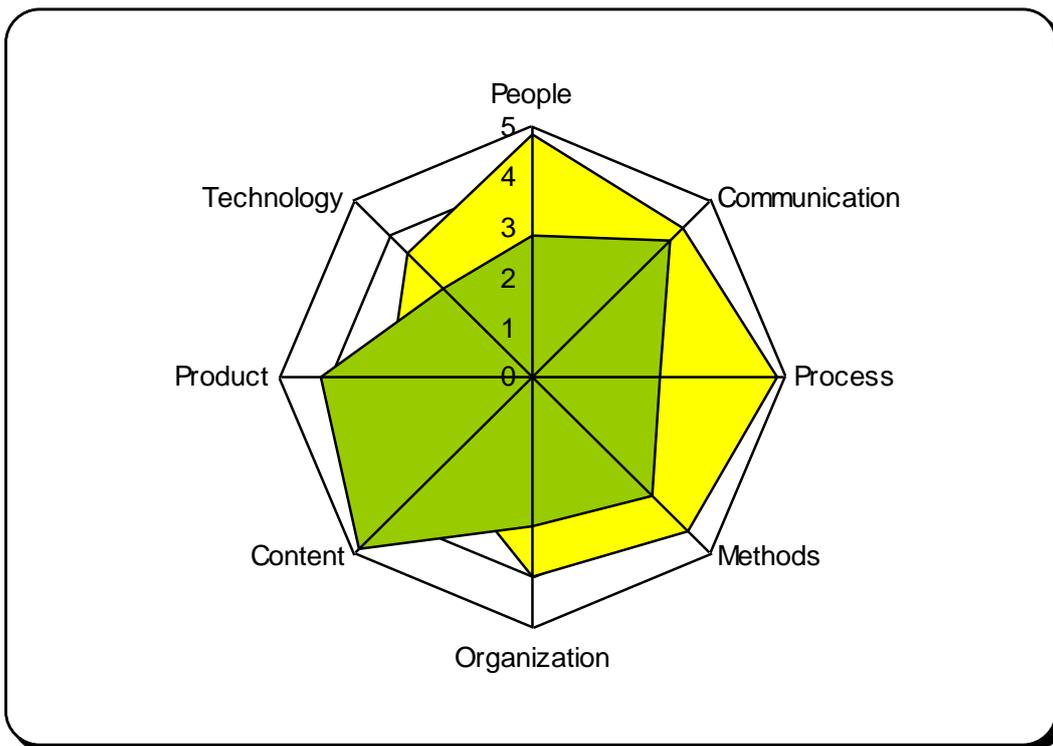
The third graph, which mixes and compares the other 2, shows the areas of overlapping -i.e. a common strong Communication orientation-required for both profiles.



1



2



3

Both identified profiles are shown in the heuristic/diagnostic compass: the ALP Profile (yellow polygon) has more systemic role related to the process of adult learning while the EAT profile (green polygon) has a more specific/operational role based on the content’s expertise.

1.4 Systemic mapping

With this map we want to identify for each selected profile, the acted processes as reported in the ALPINE study. This tool will help define consequently the competences needed for each process to be performed.

Processes															
Profiles															

In the specific case of the Quadultrainers Project, the two profiles selected for development are:

1. **EAT:** This professional profile is intended to draw the core competences nowadays required for both “full time” and “part-time” trainers (internal and/or external) operating in the financial services sector as well as in other organizational contexts. This profile is considered as a key-role in training patterns and initiatives where the specific-technical dimension of learning is crucial or prevalent.

Of course, in this profile we considered the technical component of trainer’s competences more oriented on contents/products and focused on the main objectives of preparing, developing, evaluating training sessions in professional context. Besides their expertise, they should be, at the same time, pedagogically oriented on training and learning processes/ methods for individuals and groups. In order to complete the profile, we also consider additional/specialised competences, according to the different training contexts and settings, as for the e-learning context.

2. **ALP:** This professional profile is intended to perform the core competences required nowadays to professionals operating within sector specific organizations who have a managerial role and is able to design, manage and supervise training and learning patterns and initiatives according to different organizational context and training settings. In our case, this profile is strictly related to organizational structures and roles existing within the banking and financial sector, but tries to envisage future scenarios in the training and learning arena, considering the already existing trends and the impact of the “change factors” on the training profession, with particular reference to the developments occurring with reference to main variables as processes, methods, technology, communication. In this perspective, the profile encompass a wide range of core competences, which are often “blended” and “transversal”, that can be divided and referred to different organizational/hierarchical roles but that, in this period of change and evolution, are required more than ever to present in a single professional role, especially with reference to the design dimension of training.

Here follows the example of using systemic mapping for the two profiles:

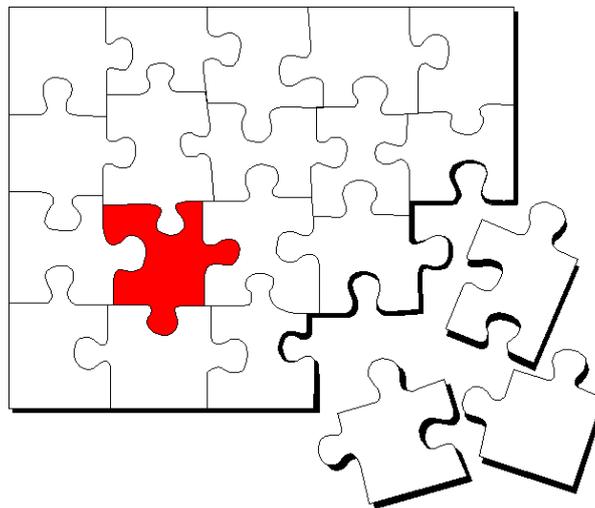
1.4.1 Example: matching pilot QUADULTRAINERS Professional Profiles/ALPINE Processes

PROCESSES	Diagnosis	Design	Delivery	Eval & Monit	Mktg	Quality & Research	Coord/Mgmt	Admin	Support/Personal
EAT	●	●	●						●
ALP	●	●		●			●		

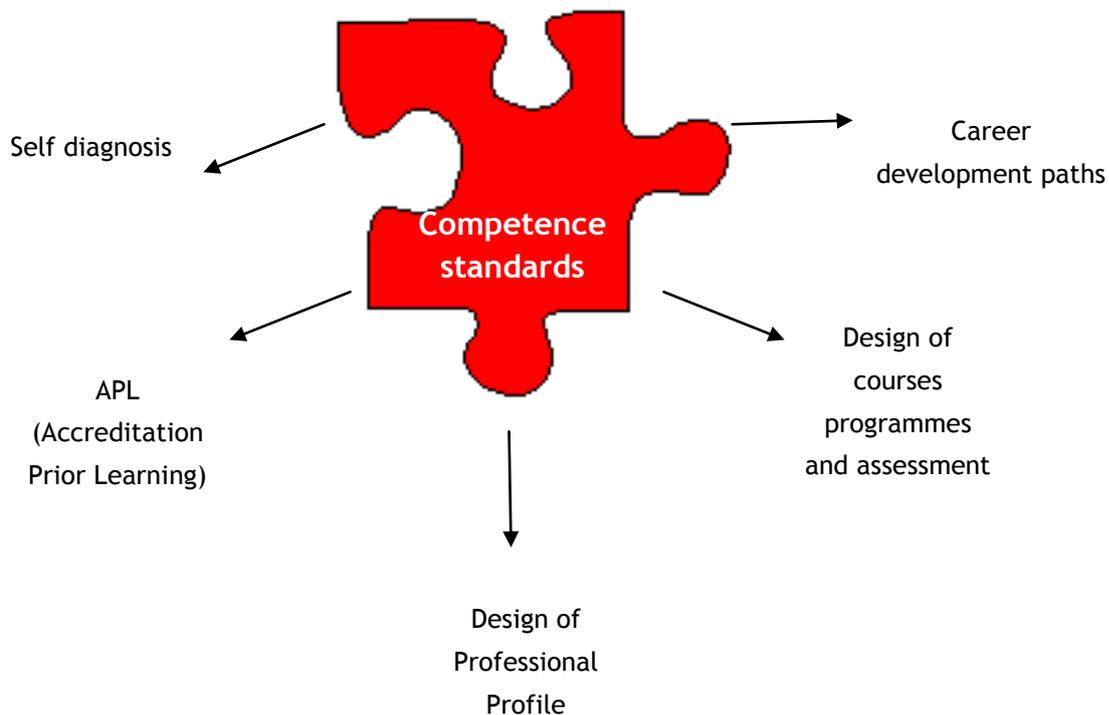
2. USABILITY OF THE COMPETENCE FRAMEWORK²

The meaning and the use of a competence framework (the heuristic/diagnostic approach - the systemic mapping - the descriptive profile) is summarized in the following draft:

Competence map



Career development paths



² Contents developed by SCIENTER

3. THE EXPERT ADULT TRAINER (EAT)³

1 - The Competence Profile

This profile was designed to fit both the full time trainer and the part-time trainer as in both situations the trainer needs to have the same competences: a strong technical expertise, and on the other hand, pedagogical / andragogical, communicational and social competences.

This profile of adult trainer is more related to the social dimension of training, allowing the adjustment of learning processes, as well as the managing of training progression. We conceived the profile as a professional of training evolved at constructing effective learning processes. That is the reason why we consider more adequate to refer to learning activities events / processes / sessions / courses / programmes and not only to learning sessions (traditional face-to-face training in a classroom).

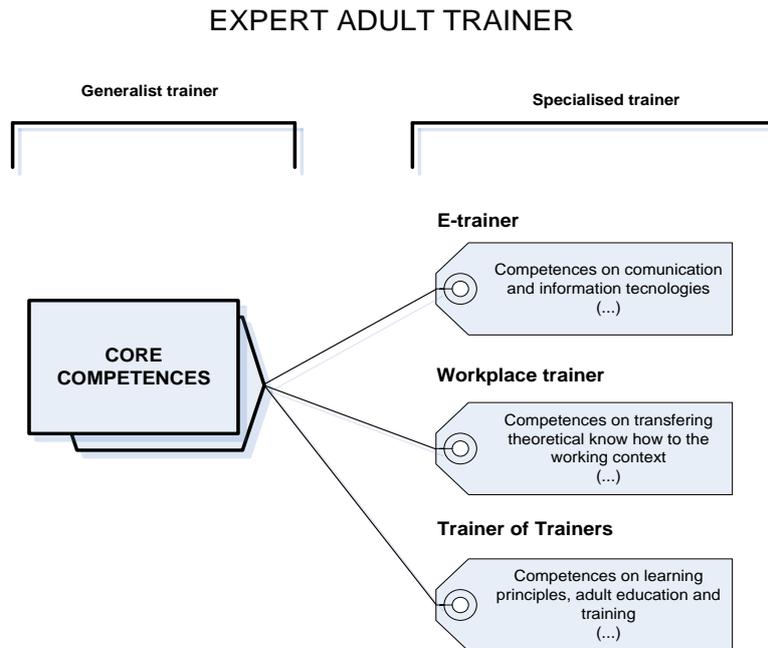
When designing the profile we took into consideration also the new changes according to new learning techniques such as ICT, new media and social networks relevant for the learning processes of adult learners.

As far as the different learning methodologies are concerned, we believe that the e-learning / b-learning trainer competences as well as the workplace trainer competences can be referred as specialised or additional competences, according to the different training contexts.

In this sense, the specialised / additional competences can be added to the core competences, according to each specific situation/context, allowing more complete profiles of adult trainer that will be further detailed accordingly.

³ Contents developed by IFB

In a scheme:



2 - The Competence Grids

We tried to conceive a qualification of EAT that can be adopted in the different European Countries, in the Financial Services Sector, but in other sectors as well.

The information included in these grids meant to describe each of the five core competences in a very detailed way, by identifying key activities, key performance indicators, knowledge, skills and attitudes required to perform each of the competences.

We are aware of the fact that the information included in the grids can vary from European country to European country and, even inside each country, many different realities can be found.

However, we opted for an exhaustive description of the core competences associated to the EAT and all the possible processes, tasks and activities, because we believe it can facilitate the work of each partner/country in tailoring the EAT competence profile it to its reality. It doesn't mean that the all the countries should follow exactly the model and the description as we present in this grids.

In fact, all the partners are free to drop or to add any aspect considered adequate when introducing the EAT qualification in their countries.

COMPETENCE PROFILE

FOR EXPERT ADULT TRAINER

DESCRIPTION	<p>The Expert Adult Trainer is the professional who is:</p> <ul style="list-style-type: none"> ▪ A specialist, specialised in a certain scientific, technical or/and technological area/content ▪ Able to establish a pedagogical relation with the trainees during a training event/process, promoting the acquisition of knowledge and competences as well as the development of attitudes and behaviours in accordance with the professional profile required <p>Though being a content expert, as main identity, the Expert Adult Trainer is a facilitator in the learning process, able to prepare the setting for new environments, for specific learning contexts and methodologies (e-learning and other ICT - based learning, training in the workplace, coach and mentoring, etc.) and capable of supporting and guiding to adult learners, in their professional learning; he should be able to respect and valorise social diversity in the group of trainers and manage the different cultures and social backgrounds</p>
AIM	<p>This professional should be able to diagnosis, prepare, develop and evaluate specific training activities/events/processes/courses/sessions in a professional training context</p>
ORGANIZATIONAL CONTEXTS	<ul style="list-style-type: none"> • Vocational, Education and Training centres • Professional (full-time) training or part-time/occasional training (in-company or externally) • Business schools
ORGANIZATIONAL ROLES	<ul style="list-style-type: none"> • Expert classroom trainer • Expert e-trainer/b-trainer • Expert workplace (on the job) trainer
CORE COMPETENCES	<ul style="list-style-type: none"> • Adapt the body of content/knowledge and expertise to the different organisational contexts and target groups • Plan, prepare and conduct specific training activities/events/processes/sessions/courses • Establish a pedagogical and andragogical relation with each group of trainees by providing support, facilitating and encouraging the learning process • Adapt the learning processes/activities to individual learning pace and preferences • Evaluate the training efficiency and efficacy at a specific training event
SPECIALISED ADDITIONAL COMPETENCES	<p>/</p> <p>By Specific Sectors:</p> <ul style="list-style-type: none"> • Banking and Financial Sector • (...) <p>By Learning Contexts:</p> <ul style="list-style-type: none"> • E- learning/B-learning (Web) Context • ICT learning • Workplace Context • (...)

	<p>By Target-group:</p> <ul style="list-style-type: none"> • Training the trainers • (...)
CORE ATTITUDES	<p>Autonomy (as lifelong learner)</p> <ul style="list-style-type: none"> • Integrity • Flexibility • Empathy • Active listening • Pro-activity • Encourage participation and interaction • Creativeness • Self-control • Openness to criticisms and to auto-criticism • Openness to change
PRE-REQUISITES	<p>Candidates for this qualification are assumed to have:</p> <p>Bachelor degree (in the field of expertise)</p> <p>and / or</p> <p>2 years of professional experience (in the field of expertise)</p>
PRE-REQUIRED COMPETENCES	<p>Strong communication skills</p>
EQF LEVEL	<p>4</p>

COMPETENCE GRID FOR EXPERT ADULT TRAINER

CORE COMPETENCES

A competent “EXPERT ADULT TRAINER” is able to:

- 1 - Adapt the body of content/knowledge and expertise to the different organisational contexts and target groups
- 2 - Plan, prepare and conduct specific training activities/events/processes/sessions/courses
- 3 - Establish a pedagogical relation with each group of trainees by providing support, facilitating and encouraging the learning process
- 4 - Adapt the learning processes/activities to individual learning need pace and preferences
- 5 - Evaluate the training efficiency and efficacy at a specific training event

CORE ATTITUDES
<ul style="list-style-type: none"> • Autonomy (as lifelong learner) • Integrity • Flexibility • Empathy • Active listening • Pro-activity • Encourage participation and interaction • Creativeness • Self-control • Openness to criticisms and to auto-criticism • Openness to change

Competence 1 - Adapt the body of content/knowledge and expertise to the different organisational contexts and target groups		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<ul style="list-style-type: none"> • Distinguishes clearly, within the field of expertise, the relevant subjects/contents/experiences for the participants • Speaks the language of the profession • Integrates his/her own professional expertise within the field of training • Advises in what concerns transferability of training in organisational settings 	<ul style="list-style-type: none"> • Participation in conferences, workshops, and training events in the field of expertise and interpersonal /coaching • Participation in networks of his/her expertise • Selection of contents with practical relevance for the training, in each specific situation • Application of technical terms and methodologies adopted in the professional practice, within the training • Switch between theory and practice during the contact with participants • Concrete identification of the different organisational settings • Studies published on training issues in his/her specialised area 	<p><i>Universal</i></p>
Description updating requirement	3 years	

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<p>A sound knowledge of:</p> <ul style="list-style-type: none"> • Relevant recent developments in his/her field of expertise • Updated scientific, technical, technological and practical subject matters of training • The working market • Training planning in the different training events • Interpersonal communication techniques <p>Knowledge about diversification of learning environments</p>	<ul style="list-style-type: none"> • Communication skills • Team management skills • Ability to use the professional/technical language according to each group or individual characteristics • Ability to select the right learning resources • Ability to give contributions at networks 	<ul style="list-style-type: none"> • Be involved in professional situation in the working place • Dedication • Responsibility • Autonomy • Flexibility • Pro-activity • Creativity • Be strict 	<p>A sound knowledge of:</p> <ul style="list-style-type: none"> • Development referring to the internationalization and globalisation of the FSS • Transparency, compliance and integrity • Sectoral networking 	

Competence 2 - Plan, prepare and conduct specific training activities / events / processes / sessions / courses		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<ul style="list-style-type: none"> Participates in the diagnosis of training needs (to anticipate training needs) Plans training activities /events / processes / sessions / courses concerning place of accomplishment, physical conditions, resources including media available, duration and support documentation Designs training activities /events / processes / sessions / courses concerning the training needs, contents, aims, materials, activities, selection of methods, evaluation of outcomes Conducts training activities /events / processes / sessions / courses concerning contents, aims, materials, activities, selection of methods, evaluation of outcomes 	<ul style="list-style-type: none"> Involvement in meetings with the clients to become aware of their real training needs and to adequate the training materials, methods, etc Balanced activities /events / processes / sessions / courses according to place of accomplishment, physical conditions, media available, duration and group Balanced activities /events / processes / sessions / courses according to training needs, contents, aims, design of materials, methods, evaluation of outcomes and tools used 	<i>Universal</i>
Description updating requirement	5 years	

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<p>A sound knowledge of:</p> <ul style="list-style-type: none"> Scientific, technical or/and technological updated subject of training How to plan, deliver and implement didactical phases and units according to training needs and objectives Mechanisms and learning processes Learning styles (approaches) Training planning Pedagogical objectives Methods and pedagogical techniques and tools Principles of adult learning 	<ul style="list-style-type: none"> Ability to use, re-elaborate and integrate different methods, techniques, in different training activities, in a consistent way according to the main variables (objectives, target, schedule, planning, setting, etc) and according to 	<ul style="list-style-type: none"> Responsibility Autonomy Flexibility Dedication Pro-activity Creativity Leadership Decision taking Be strict 	<p>Increasingly important are:</p> <ul style="list-style-type: none"> Learning on the job Increase in demand of thorough knowledge of international systems Knowledge of 	

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<ul style="list-style-type: none"> • Learning techniques (ICT, new media and networks) • Methods and tools of evaluation • Time managing <p>General knowledge about:</p> <ul style="list-style-type: none"> • Principles of organisational management, applied to the specific organisational learning context • Diversification of learning environments • Principles of educational quality assurance • Methods and techniques on information collecting and treatment (interviews, questionnaires, focus groups) 	<p>different training typologies, settings and contexts, including learning styles and attitudes of participants</p> <ul style="list-style-type: none"> • Capacity to analyse and synthesise concepts • Planning and organisational skills • ICT skills 		<p>merging of business</p> <ul style="list-style-type: none"> • Demand for the recognition of existing competences 	

Competence 3 - Establish a pedagogical relation with each group of trainees by providing support, facilitating and encouraging the learning process		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<ul style="list-style-type: none"> Facilitates the learning process and the pedagogical relation Delivers and implements didactical phases and units according to training needs and objectives Promotes group activities applicable to learning goals Coordinates and adjusts learning content according to the knowledge, experience and culture of the group Supports participants in broadening and deepening their knowledge and competencies 	<ul style="list-style-type: none"> Use, re-elaboration and integration of different methods, techniques, in different training activities, in a consistent way according to the main variables (objectives, target, schedule, planning, setting, etc) and according to different training typologies, settings and contexts, including learning styles and attitudes of participants Solutions presented on learning questions/problems Adequate treatment monitored in identifying learning problems In time feedback, as stimulation of the learning process 	<i>Universal</i>
Description updating requirement	5 years	

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<p>A sound knowledge of:</p> <ul style="list-style-type: none"> Principles of adult learning Mechanisms and learning processes Pedagogical objectives Learning methods, pedagogical techniques / tools Games and activities that make the learning process effective Interpersonal communication techniques Group and interpersonal dynamics, including learning styles and attitudes of participants <p>General knowledge of:</p> <ul style="list-style-type: none"> Principles of organizational management, applied to the specific organizational learning context E-learning, b-learning, social learning methodologies Learning techniques such as ICT, new media and social networks, relevant for the learning processes of adult learners <p>The changing in educational structures and the change of trainers roles Use of audio and visual media Time managing Methods and tools of evaluation</p>	<ul style="list-style-type: none"> Communication skills Presentation and public speaking skills Ability to promote the principle “learn how to learn” Pedagogical animation skills Team management skills Negotiation skills Problem/conflict solving skills Ability to select the right learning resources to stimulate adult learners <p>Ability to use ICT, new media and social networks as educational tool</p> <ul style="list-style-type: none"> Planning and organisational skills Heterogeneity and diversity management skills Overcoming learning barriers skills Capacity to analyse and synthesise concepts Capacity to motivate, specially unmotivated trainees and their resistance to training Ability to support a learning friendly atmosphere 	<ul style="list-style-type: none"> Promotion of personal and professional self-development Team spirit Consensus building Flexibility Empathy Active listening Pro-activity Encourage participation and interaction Creativeness Self-control Openness to criticisms and to auto-criticism Openness to change Leadership Be motivated Decision taking 	<p>Groups may already have a rather high level of education which calls for a more controlled approach in case of training specialities</p>	

Competence 4 - Adapt the learning processes/activities to individual learning pace and preferences		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<ul style="list-style-type: none"> • Adjusts learning content according to the differences of knowledge, experience, culture and learning styles/paces of the participants • Adjusts learning methodologies/techniques and approaches according to the differences of knowledge, experience, culture and cognitive learning styles/paces of the participants • Supports participants in broadening and deepening their knowledge and competences • Manages trainees learning progression • Re-orientates trainees towards working processes 	<ul style="list-style-type: none"> • Monitoring of learning routes and, if necessary, adjust them • Solutions presented to learning questions/problems • Application of interpersonal communication techniques • Application of methods and techniques according to participants differences • In time feedback, as stimulation of the learning process • Implementation of necessary adjustments to learning processes • Support given to learning that takes place at the enterprise based on trainer's familiarity with enterprise reality 	<i>Universal</i>
Description updating requirement	2 years	

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<p>A sound knowledge of:</p> <ul style="list-style-type: none"> • Mechanisms and learning processes • Pedagogical objectives • Methods and pedagogical techniques and tools • Interpersonal communication techniques • Group and interpersonal dynamics, including learning styles and attitudes of participants • Methods and tools of assessment <p>General knowledge of:</p> <ul style="list-style-type: none"> • Principles of adult training • Principles of organizational management, applied to the specific organizational learning context • New methodologies, such as e-learning, b-learning, social learning • Case studies writing 	<p>Communication skills</p> <ul style="list-style-type: none"> • Develop behaviours to facilitate the pedagogical relation • Pedagogical animation skills • Team management skills • Problem/conflict solving skills • Ability to use the professional/technical language according to individual characteristics • Ability to select the right learning resources to stimulate adult learners • Ability to use ICT as educational tool • Ability to integrate different methods, techniques, in a consistent way according to the main variables (objectives, target, schedule, planning, setting, etc) and according to different training course typologies, settings and contexts, including learning styles and attitudes of each participant • Ability to promote the principle “learn how to learn” • Skills to manage unmotivated trainees and its resistance to training • Diversity management skills 	<ul style="list-style-type: none"> • Pro-activity • Flexibility • Autonomy • Fit into different social and professional settings • Empathy • Be motivated • Active listening • Encourage participation and interaction • Promote collaborative work • Encourage cordial relationship between trainer and trainee and between trainees • Self-control • Openness to criticisms and to auto-criticism • Decision taking • Openness to change • Be in good relation with himself and with the others • Leadership 		

Competence 5 - Evaluate the training efficiency and efficacy at a specific training event		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<ul style="list-style-type: none"> Participates in the construction of the assessment and evaluation tools Evaluates all the resources involved in the training process concerning the training activities/events/processes/sessions/ courses Assesses the training outcomes during and at the end of the training activities/events/processes/sessions/courses Participates in the evaluation of the impact of the training in the professional performance in the working settings 	<ul style="list-style-type: none"> Production of adequate evaluation tools for instance written examinations, questionnaires, simulations, etc Reports on the information captured from the trainees on the different aspects of the planning and development of the training activities/events/processes/sessions/courses Reports on the results obtained by the trainees at the end of the training activities/events/processes/sessions/courses Reports on effective performance of the trainees, after the training as well as at the working place (and also its effects on others performance) Analysis of learning transferability 	<i>Universal</i>
Description updating requirement	5 years	

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<p>A sound knowledge of:</p> <ul style="list-style-type: none"> Methods of evaluation /assessment Construction of pedagogical tools of assessment and evaluation Construction of pedagogical grids for correction of tests/examinations or for behaviour observation in simulations <p>General knowledge of:</p> <ul style="list-style-type: none"> Principles of Adult learning Principles of project management Principles of educational quality assurance 	<ul style="list-style-type: none"> Ability to use and adapt the professional/technical language to the target group ICT skills Report writing skills Capacity to analyse and synthesise concepts 	<p>Integrity</p> <p>Flexibility</p> <p>Autonomy</p> <p>Transparency</p> <p>Responsibility</p> <p>Be strict</p>		<p>Special attention may be given to the evaluation of working with figures and account matters</p>

4. THE ADULT LEARNING PROFESSIONAL (ALP)⁴

1 - The Competence Profile

The description of the Profile takes into account the Quadultrainers Competency Framework -based on current European researches and studies as well as on contribution of several Project Partners, as AIF- and the experience of AIF Certification System of different Professional Profiles in Adult Training⁵.

It relies to an **intersectorial perspective** that consider the dynamicity and the more and more wide “spectrum” of training and learning professions, contexts, settings, etc. existing today. It wants to be consistent with the assumptions of the ALPINE Research with special regard to the identification of different specific “NVAL -Non Vocational Adult Learning- Positions”, with their own specific duties and responsibilities, in particular “**Management positions**”⁶, “**Programme Planning positions**”⁷, **Media Use positions**⁸.

On the other hand, the Profile wants to be consistent with the criteria adopted by the Quadultrainers’ Partners for the selection of the 2 <Pilot Profiles>, as:

- Broad potential market in a stakeholders perspective
- Relevance in the Banking and Financial Sector
- Easiness to verify/validate in the specific Sector as well in other main sectors.

Furthermore, it wants to fit with the specific needs and organizational models/roles of banking and financial sector in order to be “replicable in Europe and in multiple organizational structures of the Banking sector” as stated in the Quadultrainers Project objectives, as well for other economic sectors.

⁴ Contents developed by AIF

⁵ See Quadultrainers deliverable: “State of the art Report on existing qualifications and competence frameworks for adult trainers in Europe (Edited by SCIENTER with Contributions by AIF, EBTN, Febelfin / Febelfin Academy, HWR Berlin, IFB and Scienter), pp. 37-48

⁶ “Managers of adult learning centres and institutions need the skills and competences to be good leaders, to manage educational and organizational quality, to develop their staff, to engage in educational marketing, to raise funds, to manage projects and hardware (buildings, infrastructure, etc.) and to maintain regional cooperation network.”

⁷ That include not only the programme planning and development of learning material activities and competences inside the organization, but also a “broader and more differentiated spectrum” if “programme planning is run out in cooperation with external stakeholders (local authorities, associations and other educational institutions...)”.

⁸ Considered as a “rapidly-growing field of activity (that) involves the production and use of teaching software, cooperation with IT experts and the development of teaching and learning opportunities with interactive media and on the internet”.

From an **organizational perspective**, the Profile refers directly to different but specific organizational functions/roles as (according to the organizational context and dimensions): “(Training) Project Manager, (Training) Project Leader, Methodologies and Contents Design(er), Process Tutor, etc.

It means that - for the aims of our Project - we have to consider these positions always as **internal roles**, directly or at least indirectly connected with the training and learning and/or HR/Organizational Development internal functions.

So, emphasis is put on Processes like “Coordination and Management”, “Diagnosis”, “Evaluation & Monitoring” (see ALPINE Research), mainly at a **“strategic” level and in a stakeholders’ perspective**⁹.

2 - The Competence Grids

The information included in these grids describe each of the five core competences in a detailed way, by identifying key activities, key performance indicators, knowledge, skills and attitudes required to perform each of the competences. They also consider suggestions and contribution given to Partners by the Quadultrainers Advisory Board and participants to the Lisbon Concertation Meeting.

We are aware of the fact that the information included in the grids can vary from European country to European country and, even inside each country, many different realities can be found, to be verified also in the incoming “Piloting” phase.

In fact, all the partners are free to drop or to add any aspect considered adequate when introducing the ALP qualification in their countries.

The collaboration of the partners will be much appreciated in what concerns the introduction of information about the “Sector specific elements”, in each core competence, if considered relevant and possible to be applicable in most of the European countries.

⁹ This focus represents the systemic difference between the two Quadultrainers “Pilot Profiles”

COMPETENCE PROFILE

FOR “ADULT LEARNING PROFESSIONAL” (ALP)

<p>DESCRIPTION</p>	<ul style="list-style-type: none"> • The “Adult Learning Professional” (ALP) is a professional who has appropriate competences (relating to the professional and organizational role, as well as to the relationship with people inside and outside the organization) in order: • “to design, manage and supervise training and learning patterns and initiatives according to different organizational context and training settings”¹⁰, having a full awareness of “the developments occurring with reference to main variables as processes, methods, technology, communication”¹¹. • to evaluate and monitor the results and the quality of the training activities compared to the desired objectives and the existing quality standards. <p>(See below for “Core Competences” and “Pre-required Competences”¹²)</p>
<p>AIM</p>	<p>To set a professional profile -referring to different organizational functions/roles- with specific competences and responsibility in order to:</p> <ul style="list-style-type: none"> - manage and coordinate - plan and design, - evaluate and monitor <p>general and/or specific training activities and learning processes within an organizational context, according to a systemic approach and in a “stakeholders’ perspective”. The ALP is oriented toward the learning approaches related to Life Long Learning Vision and Policies (based on the blending of formal, non formal and informal learning).</p>
<p>ORGANIZATIONAL CONTEXTS</p>	<p>Professional/organizational contexts as:</p> <ul style="list-style-type: none"> - Private/Public companies and No-profit Sectors); - Corporate Universities/Business Schools; - Educational V.E.T. Training Institutions.
<p>ORGANIZATIONAL ROLES¹³</p>	<p>As, for example:</p> <ul style="list-style-type: none"> - (Training) Project Manager; - (Training) Project Leader;

¹⁰ See “Quadultrainers’ Competence Framework”.

¹¹ Ibidem.

¹² Core Competences refer to “Specific Competences”, i.e. “competences that are needed to carry out a specific activity. They complement the generic competences towards a certain activity”. “Pre-required Competences” refer to Generic Competences”, “that are relevant for carrying out all activities in the adult learning sector. Every professional working in the sector ought to possess these competences, whether they carry out teaching, managing, counseling or administrative activities, since these competences define what it means to be a *professional*”. (See “ALPINE Background Paper, Research voor Beleid, B.J. Buiskool, S.Broek, 13.11.2009)

¹³ The ALP Profile include competencies required -in the organizational contexts- to different adult learning positions/roles

	<ul style="list-style-type: none"> - (Training) Methodologies and Contents Design(er); - (Training) Process Tutor
CORE COMPETENCES¹⁴	<p>Plan, implement and coordinate learning Programmes in a training organizational context</p> <p>Design - working in teams - adult training and learning processes, through blending and integration of different methods, techniques and tools (including new media)¹⁵</p> <p>Support and facilitate ICT and new media experts in the construction of effective learning processes and environment for adult learners¹⁶</p> <p>Monitor and Evaluate the adult training activities and learning process and assess results with respect to the pre-defined objectives</p> <p>Manage, improve and assure the quality of training and learning processes.</p>
SPECIALISED/ ADDITIONAL COMPETENCES (For/By Specific Sector Or Specific Learning Context/Target Groups)	<p>By Specific Sectors:</p> <ul style="list-style-type: none"> - Banking and Financial Sector (...) <p>By Learning Contexts, e.g.:</p> <ul style="list-style-type: none"> - E- learning/B-learning (Web) Context - ICT learning - Workplace Context <p>By Target-group, e.g.:</p> <ul style="list-style-type: none"> - Training the trainers - Training of adults (...)
CORE ATTITUDES	<ul style="list-style-type: none"> - Integrity¹⁷ - Empathic Approach - Active Listening - Leadership xxx - Team working/People integration - Reliability/Result orientation - Systemic vision and approach¹⁸ XXX - Proactivity

¹⁴ See “Core Competences Grids” for details on: *Key Activities, Performance-Key Indicators, Knowledge/Skills/Attitudes* for each core competency).

¹⁵ This competence requires knowledge and skills (see specific Competence Grid) related to the blending of methodologies appropriate at an organizational level (and not merely from a didactical effectiveness perspective, as in the case for the Expert Adult Trainer Profile - see IFB draft document on EAT Profile)

¹⁶ Includes activities like *cost-benefit analysis on the use of technologies; “cooperation with IT experts” on their impact and adaptability to the organization, as in the case of e-learning investments, etc (See Competence Grid n.3).*

¹⁷ To be considered as a personal and professional consistency and transparency.

¹⁸ awareness to social dimensions of adult learning

	<ul style="list-style-type: none"> - Flexibility/Creativity - Open mindness to change factors - Synthetic thinking
PRE-REQUISITES (BACKGROUND PROFESSIONAL EXPERIENCE¹⁹	AND Higher educational degree Working experience in the field of adult training (mainly in planning, managing and supervise training initiatives).
PRE-REQUIRED COMPETENCES²⁰	Effectively working in and with teams; Communicate, coordinate and collaborate (especially in teams) with adult learners, colleagues and other internal/external stakeholders; negotiate with heterogeneous groups of people and different professional/social and economic stakeholders; - Identify problems, find solutions together and anticipate change factors within the society, the profession, the organization; General Management and marketing/customer orientation competences as: awareness of financial and budget constraints, fund-raising skills, internal/external markets analysis skills, etc.
EQF LEVEL	From 5 to 6 ²¹

¹⁹ These factors could vary according to the different profiles and to specific Core Competences.

²⁰ See note n. 4.

²¹ Level 5 is referred to the Adult Learning professional competences (not to the overall working capacities and experience of the ALP)

COMPETENCE GRID FOR ADULT LEARNING PROFESSIONAL

CORE COMPETENCES

A competent “ADULT LEARNING PROFESSIONAL” (ALP) is able to:

1. Plan, implement and coordinate learning Programmes in a training organizational context
2. Design -working in teams- adult training and learning processes, through blending and integration of different methods, techniques and tools (including new media)²²
3. Support and facilitate ICT and new media experts in the construction of effective learning processes and environment for adult learners²³
4. Monitor and Evaluate the adult training activities and learning process and assess results with respect to the pre-defined objectives
5. Manage and improve the quality of training and learning processes

CORE ATTITUDES
<ul style="list-style-type: none"> • Integrity²⁴ • Empathic Approach • Active Listening • Leadership • Team working/People integration • Reliability/Result orientation • Systemic vision and approach²⁵ • Proactivity • Flexibility/Creativity

²² This competence require knowledge and skills (see specific Competence Grid) related to the blending of methodologies appropriate at an organizational level (and not merely from a didactical effectiveness perspective, as in the case for the Expert Adult Trainer Profile - see specific EAT documents).

²³ Includes activities like cost-benefit analysis on the use of technologies; “cooperation with IT experts” on their impact and adaptability to the organization, as in the case of e-learning investments, etc.

²⁴ To be considered as a personal and professional consistency and transparency

²⁵ awareness to social dimensions of adult learning

- Openness to change factors
- Synthetic thinking

Competence 1 - Plan, implement and coordinate learning Programmes in a training organizational context		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<ul style="list-style-type: none"> ✓ Coordinate and manage -mostly in interfunctional teams- internal/external analysis/researches on training and learning needs, scenarios, trends, at a <i>systemic</i> and/or <i>organizational</i> level ✓ Anticipate training and learning needs, inside and outside the organizational context, adapting them to the internal/external customers ✓ Make formal proposals in order to develop, structure and implement a Training Plan or Programme or specific Project, through diagnosis and analysis of the main <i>organizational</i> and <i>systemic</i> variables²⁶ ✓ Coordinate and select working teams identifying and involving all those can have a relevant role in setting up an effective Plan/Programme/Project²⁷ ✓ Coordinate the overall path as well as the single phases of the Programme/Project and its results²⁸ with the involvement of all the stakeholders and using all appropriate resources ✓ Prepare written and oral presentation of the Plan/Programme/Projects 	<ul style="list-style-type: none"> - - Sound and updated knowledge of general strategies and specific training needs and objectives of the organization - - Customized and tailor-made programme base on real and updated needs - - Conduct effective individual and group assessment on training and learning needs²⁹ - - Accurate and deep analysis of the project main variables (specific training needs, learning and competence-gaps, identification of appropriate targets, budgeting etc.) - Effective “benchmarking” activities at external level (trends and scenarios’ studies, competitors’ analysis and comparison, best practices’ analysis, etc.) and precise calculation of ROI and other results’ evaluation of training activities - Effective cooperation and synergies with all internal and external stakeholders in defining effective and consistent learning strategies - Pay attention to “network agreements” for cooperation with institutional stakeholders (e.g. Centres for Employment, Educational Institutions, etc.) - Effective usage of communication strategies and tools at internal/external level 	<p><i>Transversal</i> (See below Sector specific elements)</p>
Description updating requirement	Every 3 years	

²⁶ *organizational* -e.g. strategic priorities; *systemic* -e.g. market drivers, normative obligations, etc.

²⁷ E.g.: subject specialists, organizational functions’ experts and managers (staff and/or line managers), supervisor, external contractors, consultant, other stakeholders, etc.; in developing integrated projects, coordination of teams and “concertation table” participated also by institutional and social actors of the sector/territory.

²⁸ See also Competence Grid n. 4 and n. 5.

²⁹ As subject-specific surveys, customer satisfaction surveys and reports, prior learning assessment, interviews with individuals and target groups, training audits, staff and participants assessment centres, competences and performance appraisals, etc.).

³⁰ See also Pre-required Competences

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<ul style="list-style-type: none"> - Principles of General Management and Project Management as applicable to the specific context; - General principles of organizational disciplines and specific organizational context; - Updated knowledge of the sectorial and economic environment, especially in terms of analysis of training demand and supply, labour-market trends, competency-gap factors, etc.³¹; - Training legal framework and recent research studies - Common methodologies and tools (see <i>Skills</i>) for Project Planning and Management; - Deep awareness of training needs of all the professional families and target groups; - Training processes in their systemic and analytical variables; - Theories, principles and methodologies of training planning and projecting. 	<ul style="list-style-type: none"> - Expertise in use main methodologies and tools, mixing quali-quantitatives approaches (e.g. SWOT Analysis, Costs-Benefits Analysis³², <i>Cost-effectiveness</i> analysis³³, Contingency Planning, etc.)³⁴ - Expertise in budgeting and economic/financial assessment criteria of training effectiveness (ROI, etc.)³⁵ - Analytical and Synthetical skills for data finding and gathering³⁶, analysis and elaboration from specific surveys /researches (internal/external: e.g. Customer satisfaction surveys, business performance statistics and reports etc.) - Assessment of priorities and objectives, work assignments and delegation skills - Communication/negotiating skills with internal/external stakeholders³⁷ - Report writing and Public Presentation skills - Language skills - Expertise in selection and recruitment techniques 	<ul style="list-style-type: none"> Systemic vision and approach Team Working/People Integration Leadership Integrity Proactivity Openness to change factor Result Orientation 		

³¹ If planning integrated Programme/Projects also knowledge of methodologies of study and interpretation of the territory.

³² Including awareness of planning and decision only “cost based” and not only based on quantitative/monetary values (See *Cost-effectiveness* analysis, note 12).

³³ That consider also qualitative and not monetary factors.

³⁴ See also Core Competence n. 4.

³⁵ idem

³⁶ idem

³⁷ See also “Pre-required competences”.

Competence 2 - Design -working in teams- adult training and learning processes, through blending and integration of different methods, techniques and tools (including new media) ³⁸		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<p>Design and develop the Training Programme/Project as a whole, identifying and applying, for each of its phase/step: contents, timing schedules, methodological approaches, methods, techniques, tools (traditional and/or innovative), and all kind of required and available resources</p> <p>Set up for each Programme/Project as a whole, and for each of its phase/step, an appropriate blending of methodological approaches, methods, techniques, tools (traditional and/or innovative, including new media)</p> <p>Choose and integrate all the above mentioned elements into learning strategies that take into account also informal learning activities</p> <p>Set up and develop measurable learning objectives -based on participants' level of knowledge and experience- and the desired <i>learning outcomes</i> of the Programme/Project as a whole, and for each of its phase/step, taking into account the systemic/organizational needs, objectives and constraints³⁹</p> <p>Coordinate working teams of internal staff and other function specialists⁴⁰ (as well as other possible external actors) with different back grounding order to define the training architecture</p>	<p>Accuracy and consistency -with reference to the specific organizational context- of the analysis of the “systemic” and organizational main variables, with special regard to <i>methodological blending and integration</i></p> <p>Use of <i>experiential and interactive</i> methods(also personalized as coaching, counselling, mentoring, etc.), techniques, tools (as multimedia and visual aids)</p> <p>Designing learning processes and flexible training format -including patterns of informal learning inside and outside workplace- that are applicable and specific to the participants' work settings, timing and modalities and that allow practical application of theoretical contents to their jobs</p> <p>Assess and meet the professional development level, cultural background, needs, characteristics and learning styles of the training target groups</p> <p>Incorporate applicable learning standards and content performance indicators into learning objectives and outcomes</p>	<p>Transversal (See below Sector specific elements)</p>
Description updating requirement	Every 3 years	

³⁸ This competence require knowledge and skills related to the blending of methodologies appropriate at an organizational level (and not merely from a didactical effectiveness perspective, as in the case of the “Expert Adult Trainer” Profile).

³⁹ See Competence n. 1.

⁴⁰ See also, as a generic and transversal competence, “Pre-required competences” of the Profile.

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<ul style="list-style-type: none"> - - Sound knowledge of general principles of organizational disciplines and specific organizational context - - Current theories on adult learning and andragogy - - Cognitive Psychology and Organizational Behaviour - - Learning approaches, styles and preferences - - Motivation factors for adult learners (individual and groups) - - Updated knowledge of traditional and innovative training and learning methodologies, techniques, environments - - Knowledge of current functionality and of the developments of new media and learning networks and communities⁴¹ 	<ul style="list-style-type: none"> - Macro and micro planning skills; - Blending of learning methodologies and processes; - Capacities to draw up grids of pre-analysis and assessment methods and tools, suitable for the training action; - Expertise in budgeting and project management methods and tools (e.g. time schedule, cost/benefits analysis); - Ability to use, re-elaborate and integrate different methods, techniques, for different training activities, setting and target groups; - ICT skills. 	<ul style="list-style-type: none"> • Synthetic thinking • Active Listening • Proactivity • Team working/People integration • Flexibility/Creativity • Openness to change factors • Integrity 		

⁴¹ See also Core Competence n. 3.

Competence 3 - Support and facilitate ICT and new media experts in the construction of effective learning processes and environment for adult learners		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<ul style="list-style-type: none"> • Get/Provide a full overview of the leading technology products and services on the market; • Identify technological solutions for training programmes following a cost/benefit approach and taking into account new blended learning techniques; • Cooperate with ICT and other interfunctional experts for the development of teaching and learning solutions/opportunities/environments⁴² that incorporate ICT processes and tools; • Understand and support the implementation and adaptability of technology solutions within the organization⁴³; • Evaluate the impact of the use of ICT and new media on the learning processes⁴⁴ and outcomes. 	<ul style="list-style-type: none"> - Choose learning “blended” solutions incorporating ICT that clearly brought benefits to the organization in terms of: - Competence/performance development; - Reduction of costs and learning time schedule; - Applicability to real jobs and organizational context - Redemption rate of learning products and solutions - Create an internal/external network dedicated to provide material, methodologies, guidelines, self assessment and self-learning tools based on ICT; - Disseminate products and results of ICT methodologies and tools, supporting their integration in training practice, also as a motivational factor for trainers, participants, staff and line managers. 	<p><i>Transversal</i> <i>(See below Sector specific elements)</i></p>
Description updating requirement	3 years	

⁴² Including innovative training modules, new training delivery modes, new tools (e.g. interactive media, also used on internet), new setting (also blending “face to face” with “distance” settings).

⁴³ As in the case of e-learning investments.

⁴⁴ As for new cooperative ways of learning.

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<p>Updated knowledge of innovative training and learning methodologies, techniques, environments based on ICT, new media and learning networks and communities;</p> <p>Current developments and trends on the leading technologies (hardware/software) for teaching and learning;</p> <p>Awareness and understanding of cooperative ways of working and learning on internet (e.g. web 2.0);</p> <p>Awareness and understanding of strengths, benefits, and limitations of ICT and new media⁴⁵, from an organizational perspective;</p> <p>Group and interpersonal dynamics within technological learning environments;</p> <p>Awareness and understanding of the use of audio and visual media.</p>	<p>Application and blending of learning methodologies and processes, incorporating ICT processes and new media, appropriate at an organizational level;</p> <p>Project Management and evaluation tools, referred to the use and impact of ICT;</p> <p>Strategic Communication skills to promote diffusion and network of internal/external experts;</p> <p>Team management skills;</p> <p>Negotiation skills;</p> <p>Report writing skills;</p> <p>Budgeting skills.</p>	<ul style="list-style-type: none"> • Flexibility/Creativity; • Openness to change factors⁴⁶; • Proactivity; • Synthetic thinking; • Active Listening • Reliability/Result orientation; • Team working/People integration⁴⁷. 		

⁴⁵ Including distance learning and e-learning environments.

⁴⁶ As for new technological solutions/products.

⁴⁷ Includes understanding of other people needs and motivations.

Competence 4 - Monitor and Evaluate the adult training activities and learning process and assess results with respect to the pre-defined objectives		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<p>Constantly monitor and evaluate the training and learning processes and results -within his/her field of responsibility⁴⁸- and the impact of training on target groups⁴⁹ and at a broader organizational level⁵⁰ as constantly compared with the predefined objectives⁵¹ adapting to changing circumstances at internal and external level</p> <p>Provide and disseminate feedback activities, check-lists and customers satisfaction surveys and reports on the acquisition of knowledge and skills⁵² as well as on the performance developments⁵³ from training staff, expert trainers and other training roles, trainees, other line and functional managers</p> <p>Cooperate with training managers, training staff, supervisors (when needed), peers, “line” and other functional managers, as well as external consultants and other stakeholders, to set up and implement criteria and actions for comprehensive evaluations of training effectiveness and efficiency with regard to the pre-defined objectives and expected learning outcomes</p> <p>Trainers Evaluation concerning trainers performance appraisal Cooperate with ICT and other inter-functional experts in order to manage and assess evaluation and monitoring activities based on ICT tools and software, with special regard to “distance” and/or “blended” learning processes⁵⁴</p>	<p>Effectively manage a variety of assessment methods and tools to measure (before, during, and after training) the impact of training processes on performance improvement in the workplace of each specific training initiative</p> <p>Promote internal customers satisfaction surveys and reports⁵⁵</p> <p>Assess and integrate feedback reports from different sources, preferably from the “field” and directly checked and verified</p> <p>Identification of professional gaps/relational problems/organizational barriers⁵⁶ to effective transfer of learning to target groups and/or individuals</p> <p>- Readiness to plan appropriate and timing corrective measures/actions⁵⁷ based on updated assessment results of specific tools, elaboration of feedback, evaluation reports and check-lists, “pilot” initiatives, precise calculation of ROI and other results’ evaluation of training activities, etc.</p>	<p><i>Transversal</i> <i>(See below Sector specific elements)</i></p>
Description updating requirement	3 years	

⁴⁸ At the organization level and with reference to specific Plan/Programme/Project.

⁴⁹ And -if needed- on the individuals.

⁵⁰ Including impact on professional performances, organizational/individual behaviors, internal climate, etc.

⁵¹ Includes monitoring and evaluation of audience learning gaps, fulfillment of learning objectives and outcomes, density and clarity of training, teaching and delivery methods, skilled “Expert Trainers”, use of organizational and financial resources, etc.

⁵² During and after training.

⁵³ Normally, after training.

⁵⁴ See also Competence n. 3.

⁵⁵ See also Core Competence n. 5.

⁵⁶ See also Core Competence n. 5.

⁵⁷ To be implemented. See Core Competence n. 5.

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<ul style="list-style-type: none"> - Principles of General Management and Project Management, including financial issues and budgeting; Principles of organizational management, as applied to the specific organizational learning context; - Common methodologies and tools (see <i>Skills</i>) for Project Planning, Management and Evaluation of training activities - Key elements of training cost and effectiveness models; - Main Value Indicators (quali-quantitative) for Training Programmes; - Awareness and understanding of strengths, benefits, and limitations of ICT and new media⁵⁸, from an organizational perspective; - Interpersonal communication dynamics and techniques. 	<ul style="list-style-type: none"> - Expertise in use main methodologies, mixing quali-quantitatives approaches and tools⁵⁹ for evaluation, also referred to ICT-based activities and processes; - Expertise in budgeting and economic/financial assessment criteria of training effectiveness (ROI, etc.)⁶⁰; - Analytical and Synthetical skills for data finding and gathering⁶¹; Specific Skills in conducting interviews, giving/receiving feedback, appraisal colloquies, etc. Problem finding/solving; Decision making/taking; Conflict management; Team management skills; Reporting and check-listing skills Performance appraisal skills 	<ul style="list-style-type: none"> • Synthetic thinking; • Systemic vision and approach; • Result orientation; • Openness to change factors; • Teamworking/People integration⁶² • Active Listening 		

⁵⁸ Including distance learning and e-learning environments (see also Core Competence n. 3).

⁵⁹ See Core Competence n. 1. See also note n. 9.

⁶⁰ See also Core Competence n. 1.

⁶¹ idem

⁶² Includes understanding of other people needs and motivations.

Competence 5 - Manage and improve the quality of training and learning processes		
PERFORMANCE DESCRIPTION		
Key activities	Key Performance Indicators	Type of competence
<p>On the basis of Evaluation and Monitor competences and activities, with reference to the specific field of responsibility, and <i>focusing on Planning/Implementation/Coordination/Design activities related to Plans/Programmes/Projects:</i></p> <p>Develop quality standards, verify and assure compliance with quality standards and criteria⁶³ provided by internal/external regulations</p> <p>Make concrete proposals in order to remove organizational barriers or to suggest organizational interventions and/or solve relational problems/professional gaps that can interfere with training and learning processes</p> <p>Implement corrective actions and measures to improve training quality processes and learning effectiveness working with other internal functions/roles and external stakeholders, using all the available expertise and resources</p> <p>Adjust and/or re-orient and re-schedule⁶⁴ -in cooperation with Expert Trainers and other didactical roles- learning Programme/Project, partly or as a whole, to fill gaps and/or in order to cope with new/changing organizational policies, strategies, needs, circumstances, required knowledge and/or competences</p> <p>Plan and Design -in cooperation with Expert Trainers and other didactical roles as well as other internal functions involved- post-training activities⁶⁵ that promote quality improvements and continued skill development by trainees and target groups</p> <p>Cooperate with specialists in using computer-based communication strategies and software applications for quality control and improvement</p>	<p>- Updated expertise on Quality Control Systems and Models</p> <p>Continuous checking for internal/external best practices and their implementation</p> <p>To use internal customers satisfaction surveys and other structured reports on training results as well as evaluation tools and reports⁶⁶ and other feedback activities' results in order to measure changes in trainees' performances</p> <p>Participation to workshops and other training activities on quality process improvements</p> <p>Exchange of information and expertise with other experts and practitioners</p> <p>Effective use of computer-based software applications for quality control</p>	<p><i>Transversal</i> <i>(See below Sector specific elements)</i></p>
Description updating requirement	3 years	

⁶³ Both general and specifically related and applicable to adult training and learning field.

⁶⁴ As far it might concern variable like: general approaches, main methodologies to be adopted, contents, timing, setting, etc. See also Core Competences n. 1 and 2.

⁶⁵ Also on the job activities.

⁶⁶ See also Core Competence n. 4.

Knowledge	Skills	Attitudes	Sector specific elements	Context specific elements
<p>Principles of educational quality assurance;</p> <p>General Principles of Quality Control and Management;</p> <p>Main Quality Control and Certification systems, models and processes, as applicable to adult training and learning field;</p> <p>Internal Quality standards, criteria, regulations and provisions;</p> <p>Knowledge of general principles of organizational disciplines;</p> <p>Specific organizational context; new/changing organizational policies, strategies, required competences, etc.</p> <p>Updated knowledge of traditional and innovative training and learning methodologies, techniques, environments;</p> <p>Updated knowledge of innovative training and learning methodologies based on ICT and new media and of software for quality control.</p>	<p>Effectively manage a variety of assessment methods and tools to measure (before, during, and after training) quality of learning processes and outcomes and trainees' performances, also for ICT learning processes;</p> <p>Expertise in use main methodologies, mixing quali-quantitatives approaches and tools⁶⁷ for evaluation, also referred to ICT-based activities and processes;</p> <p>Problem finding/solving;</p> <p>Decision making/taking;</p> <p>Team management skills;</p> <p>Use of software for quality control;</p> <p>Reporting skills.</p>	<ul style="list-style-type: none"> • Synthetic thinking • Systemic vision and approach • Pro-activity • Openness to change factors • Teamworking/People integration • Active Listening 		

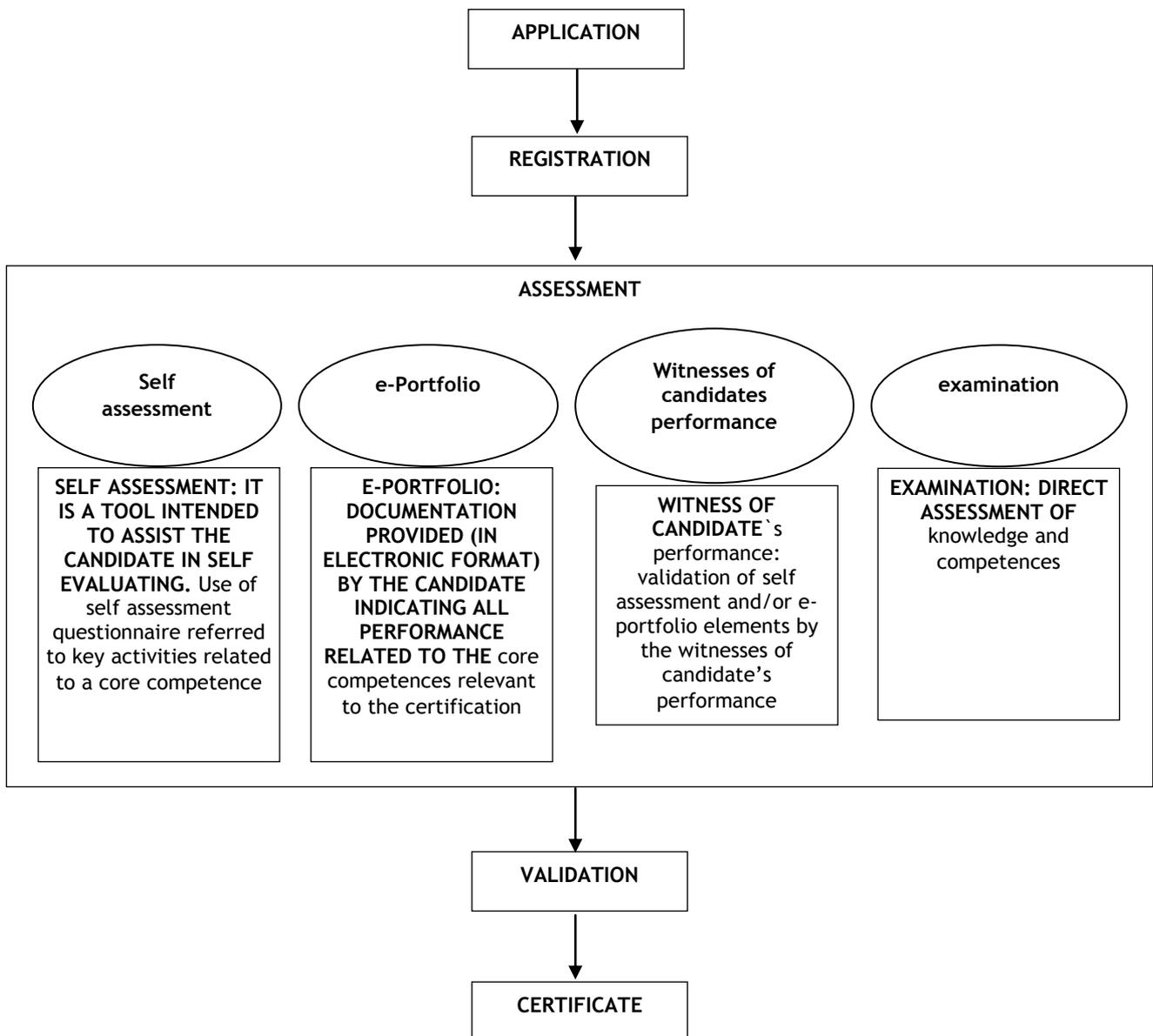
⁶⁷ See Core Competence n. 1 (see also note n. 9) and n. 4.

5. ASSESSMENT TOOLKIT⁶⁸

5.1 Assessment Model

The certification process which is put forward within this project is composed by five steps and in particular the assessment approach consists of four components which, as a whole, enables to go beyond the assessment of pure knowledge introducing the work-based assessment.

The following graph summarizes the proposed process of certification, and it includes the assessment components and it articulates them into:



⁶⁸ Contents developed by SCIENTER and IFB

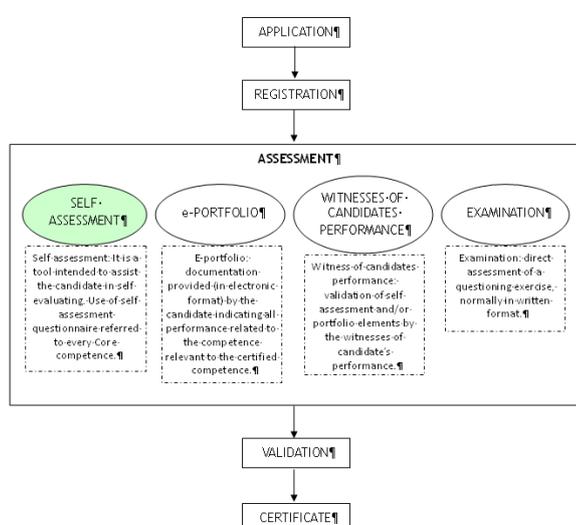
5.1.1 From the application phase to assessment:

- Check eligibility/prerequisites
- Confirm registration (and eventual payment of the registration fee)
- Plan assessment steps (receiving documents, contacting the witnesses, setting date for examination, etc.)

Weight of the assessment components:

Proposal for weighting of the four assessment components, in a total of 100%:

Assessment Components ⁶⁹			
Self-assessment	E-portfolio	Witnesses of candidate`s performance	Examination
5%	30%-40%	15%	40-50%



5.1.2 Self Assessment

Self assessment: It is a tool intended to assist the candidate in self evaluating. Use of self assessment questionnaire referred to the key activities related to a core competence.

⁶⁹ The different weightings previewed for the e-portfolio and the examination depend on how sophisticated the components of the examination are carried out

A grid to self assess the key activities related to a core competence is provided here below as an example.

Expert Adult Trainer (EAT)

Core Competence: i.e. Adapt the body of content/knowledge and expertise to the different organisational contexts and target groups

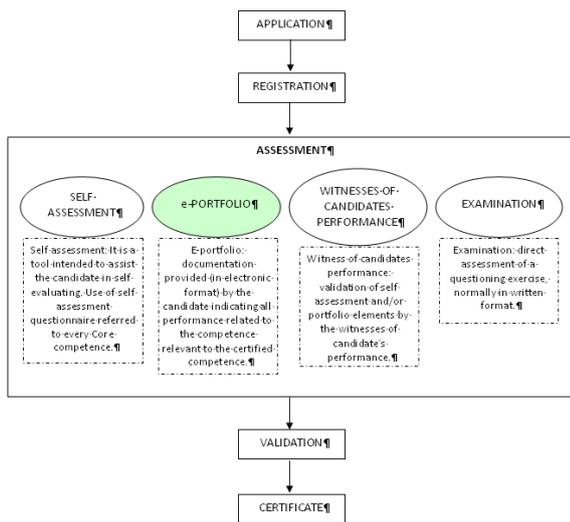
Core competences self assessment grid

Please assess your competences using the following performance scale⁷⁰:

a	Can perform task with supervision
b	Can perform task autonomously, but needs supervision/support to face anomalies/unexpected developments
c	Can perform autonomously foreseen task and most anomalies/unexpected developments, but needs supervision/support in particularly complex tasks
d	Completely autonomous in the process and can support less experienced colleagues
e	Excellent performer

Adapt the body of content/knowledge and expertise to the different organisational contexts and target groups					
Distinguishes clearly, within the field of expertise, the relevant subjects/contents/experiences for the participants	a	b	c	d	e
Speaks the language of the profession	a	b	c	d	e
Integrates his/her own professional expertise within the field of training	a	b	c	d	e
Advises in what concerns transferability of training in organisational settings	a	b	c	d	e

⁷⁰ The performance scale is valuable for the following phase (Witness of candidate's performance) as the witness can better understand the value the candidate gives to himself and consequently can give a better feedback.



5.1.3 e-Portfolio

E-portfolio: documentation provided (in electronic format) by the candidate indicating examples of performance related to the competences relevant to the certified qualification.⁷¹

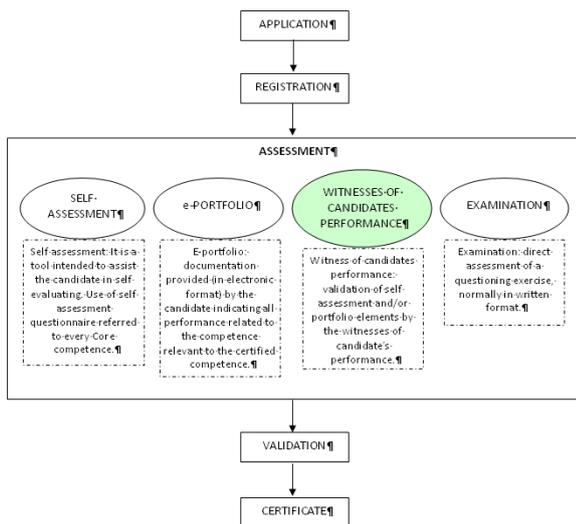
The e-portfolio should be structured as a document targeted to the competences on which the candidate should be evaluated so it should contain only specific and relevant evidences of the articles, didactical materials, seminars where the candidate performed as speaker, targeted didactical strategies, etc... the candidate has developed/produced.

The e-portfolio should not be an all-comprehensive curriculum presenting the whole professionalism of the candidate. Anyhow the CV could be attached, if the candidate considers it relevant for the assessment purpose.

A structure of the e-portfolio could be for instance:

1. Articles written
2. Didactical materials developed
3. Seminars (performance as speaker)
4. Others

⁷¹ The data in the e-portfolio must be specified and consequently might contain sensible information about the employer or its clients but they are all of candidate's in the preparation of the document, the event and all the other performance related evidences presented.



5.1.4 Witness of candidates performance

Witness of candidates performance: validation of self assessment and/or e-portfolio elements by the witnesses of candidate's performance.

The candidate could choose the witness of candidates performance according to the requirements below.

Requirements:

- 1) Each witness of candidate's performance must possess working experience and knowledge related to the competences to be considered for assessment (supported by CV).
- 2) Each witness of candidate's performance must have been in contact with candidate's work performance within the last six months before the beginning of the assessment phase

Certifying bodies should provide the witness of candidates performance with a copy of the self assessment grid and the e-portfolio of the candidates.

The e-portfolio should be evaluated by a technical expert of the accredited institute.

WITNESS OF CANDIDATES PERFORMANCE FORM

Name of witness of candidate's performance _____

Current Job _____

Job Responsibilities _____

Candidate Name _____

Relationship to Candidate _____

Length of Time to Have Known Candidate _____

C.V. of the witness

Yes No

Have you been provided with a copy of the competence description you are required testimony for?

Yes No

Please specify _____

According to your expertise and your knowledge of the candidate, could you confirm what the candidate self- assessed in the **self- assessment grid**?

totally correspondent partially correspondent Not correspondent

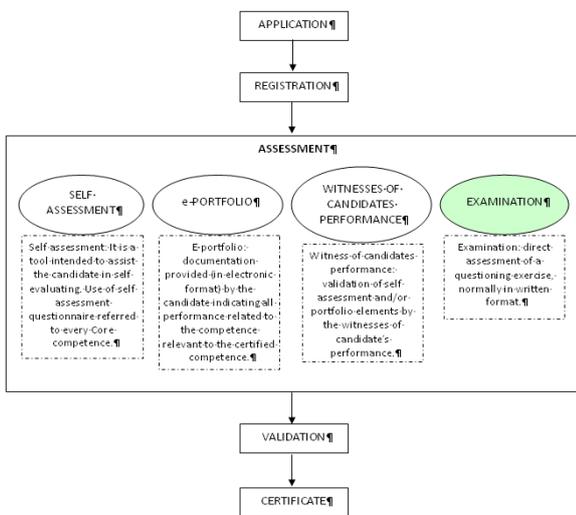
In case of partial/negative answer please specify the key activities which the candidate can not perform or perform deficiently.

Could you testimony that the evidences provided in the **e-portfolio** have been effectively produced/developed/attained by the candidate?

totally correspondent partially correspondent Not correspondent

In case of partial/negative answer please specify the weakness you have found.

Signature and Date of Approving of the Witness of candidates` performance Testimony



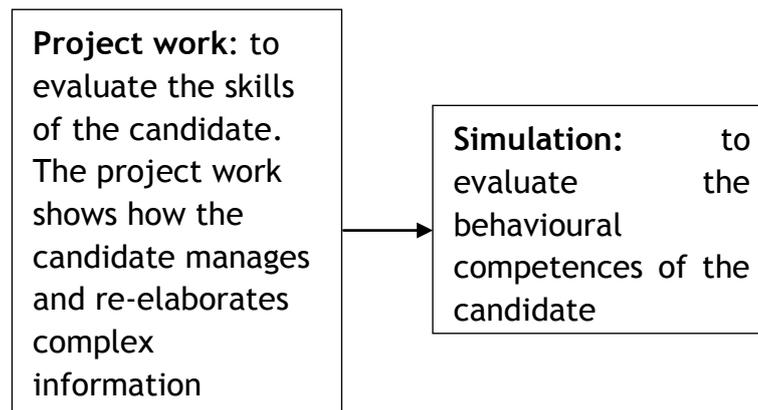
5.1.5 Examination

Examination: direct assessment of knowledge, skills and competences

The examination is composed of two different components:

- Project work;
- Simulation.

The candidate should go through these moments in order to finish the examination.



Project work:

The project work should be the moment of showing that the knowledge is interiorized and can be reflected in competences.

The project work would be different according to the candidate under evaluation, the project work should be a face to face presentation, whose subject should be in tune with the qualification to be certified (ALP or EAT).

Example:

1. EAT would be asked to develop a project work which shows that he/she dominates all the core competences of the qualification.
2. ALP would be asked to develop a project work which shows that he/she dominates all the core competences of the qualification .

The project work should contain a structure to be followed, integrating all the core competences of the qualification under assessment, as well as some common guidelines about the ideal structure, number of written lines, time of conceiving and delivery, assessment criteria, and other considered relevant.

To analyse the project work there should be a jury composed of three elements (the candidate's witness, other person considered relevant for the purpose and a member of EBTN national Agency).

Simulation:

The candidate would be asked to manage a training situation possible to happen in candidate's future working life.

The simulation will consist of a description of a situation in which the candidate is involved in a prepared scenario with the purpose of confirming the effectiveness of his performance/coordination/development of the training activity/event/process/course/session and/or to identify gaps, or other weaknesses in a given situation.

The face to face simulation could be also replaced with a live DVD recording of a real training situation that the candidate managed in his/her recent past.

5.1.6 From the assessment phase to certificate:

The **prearranged thresholds** to pass the examination are the following:

1. Above 66% of key activities coverage, the candidate pass the assessment⁷²
2. Between 50% and 66% of key activities coverage, the candidate pass the assessment with conditional requirements to better cover the failed key activities within the next six months
3. Under 50% of key activities coverage the candidate fail the assessment

5.1.7 The assessment team

The assessment team is responsible for the whole assessment process.

The assessment team is composed by at least two persons chosen by EBTN at national level:

An expert of trainer's training and qualification and;

A context expert according to the sector (e.g. from the FSS or other).

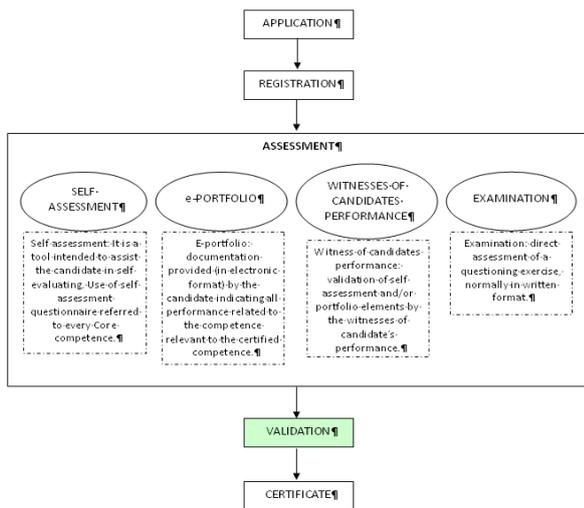
Of course the assessment team can be composed by more than two persons.

The assessment team checks the documents prior the examination step.

When all the moments of assessment are achieved, the candidate's results will be synthesized and submitted to the national agency responsible for the validation phase.

⁷² The ponderation is referred to every single competence the candidate is assessed for even if the ongoing process for the candidate regards more than one competence he/she is evaluated singularly on each of them.

5.2 Validation



EBTN is in charge of organizing the validation phase that follows the assessment. The results proceeding from the assessment process are validated and signed at national level by the certifying body and then they are sent to EBTN that certifies the result.

National certifying bodies should ideally be EBTN partners which decide to get involved in delivery of the certification.