

## **Validation of Formal, Non-Formal and Informal Learning: The case study of Personal Assistants**

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## Project information

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## Executive Summary

EUPA is a project on the validation of Formal, Non Formal and Informal learning. The project uses the sector of personal assistants (PAs), as a case study, although the methodology used can be applied in the future on other sectors as well.

EUPA **objectives** are:

1. To develop a qualifications framework for Pas based on learning outcomes (LOs)
2. To identify LOs that are easier to be developed through non formal or informal learning and to use this knowledge to design methodological tools to be used during the formal training, thus making formal training more effective
3. To develop, with the aid of an assessment tool, a European certification for PAs
4. To develop a modular curriculum and training material that will enable Pas to certify and to assign credits to the modules of this curriculum

The **main products** that have been completed are:

1. The development of a qualification framework for personal assistants in four levels (level 2,3,4,5) aligned with EQF
2. The development of an assessment tool for assessing Pas, that can be customized to be used in other sectors
3. The design and development of curricula

Both direct and indirect users will benefit from the use of the project products/results. **PAs** (direct beneficiaries) will now have a method to validate their qualifications acquired through non formal and informal learning. This is of vital importance for the specific sector since many of the personal assistants especially in Cyprus, Greece and Slovakia do not have any academic qualifications. **Trainers** and **VETS** (indirect beneficiaries) can use the project results to assess and train personal assistants. Managers and stakeholders (indirect beneficiaries) benefit since the improvement in productivity and performance of personal assistants has a direct effect on their performance and productivity. Finally, **policy makers** will also benefit through the use of an innovative methodology for the production of a validation system of qualifications.

The project approach involves desktop and applied research for the development of the qualifications framework (in terms of learning outcomes-LOs) and the assessment tool. The rest of the project objectives are achieved through an initial assessment, the delivery of training on the learning outcomes and a second assessment.

The consortium consists of VET providers (design and implementation of training), experts in qualification frameworks, representatives of the target group (identification of LOs) and social partners(policy makers). The partners complement each other and all of them together have the expertise needed to complete the project successfully

The consortium aims to commercialise EUPA. In Cyprus, after its completion it will be submitted for approval and subsidization by the national authority responsible for VET.

More information on EUPA is available at [www.llpeupa.eu](http://www.llpeupa.eu)

## Table of Contents

<b>1. PROJECT OBJECTIVES.....</b>	<b>6</b>
<b>2. PROJECT APPROACH.....</b>	<b>8</b>
<b>3. PROJECT OUTCOMES &amp; RESULTS.....</b>	<b>15</b>
<b>4. PARTNERSHIPS .....</b>	<b>18</b>
<b>5. PLANS FOR THE FUTURE .....</b>	<b>19</b>
<b>6. CONTRIBUTION TO EU POLICIES .....</b>	<b>20</b>

# 1. Project Objectives

EUPA main objective is to **develop a model for the recognition & validation of the qualifications of a sector based on learning outcomes**. The sector of Personal Assistants (PAs) has been selected (as a case study) for the following reasons:

1. PAs often do not have academic qualifications which makes the validation of other skills and competences a necessity.
2. Most of the inactive women when entering the labour market request a position as a secretary or a PA and in many cases they have no formal qualifications. Evaluation of their non formal and informal learning will ease their access to the employment market.
3. PAs are of vital importance in every EU company. Their role has been upgraded during the last decade.

The main objectives are:

1. To **develop a qualifications framework for Pas based on learning outcomes (LOs)**. This will be achieved through the identification of the learning outcomes. The innovativeness of the approach used focuses on the fact that the opinion of different parties is taken into account:
  - a. Personal assistants
  - b. Managers
  - c. Other stakeholders
2. To develop, with the aid of an **Assessment Tool**, a **European certification for secretaries and PAs**. The Assessment Tool is two dimensional and uses different methodological tools for the assessment of different learning outcomes. Therefore, when customized, it can be used across sectors.
3. To **identify the learning outcomes** that may be easier to be developed through non formal & informal learning and to use this information to design methodological tools to be used during formal training for these outcomes.
4. To **develop modular curriculum & training material** that will enable PAs to certify and to assign credits to the modules of this curriculum

From the list of objectives as stated above, it is clear that the project serves the interests of personal assistants (and executive secretaries since in some of the countries the two terms are used interchangeably). However, it should be noted that **the sector of personal assistants is used as a case study** for the application of an innovative methodology and the development of an innovative assessment tool. After the lifetime of the project the same methodology and approach can be used for different sectors.

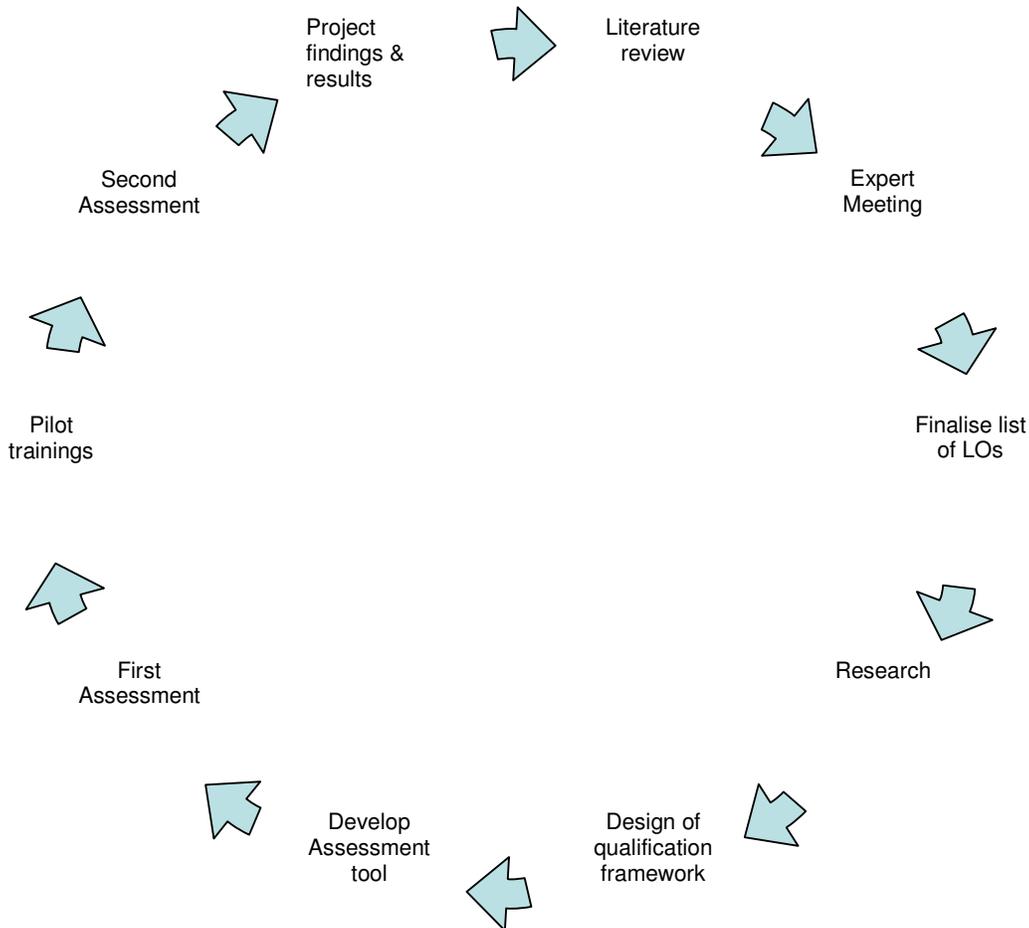
More specifically:

- The research approach (360 approach) can be used to identify the learning outcomes

- The assessment tool can be used as a template and adopted to fit any sector
- Using a similar methodology, learning outcomes that can be easily developed through informal or non formal learning can be identified and useful conclusions related to the types of methodological tools that should be used to train learners on the specific learning outcomes (eg experiential learning) may be drawn.

Therefore, the project will indirectly benefit the qualification framework of different sectors.

## 2. Project Approach



In order to achieve its objectives EUPA has adopted the following approach

### Literature review

Literature review had two objectives

- a. Firstly, to gain **in depth knowledge on the EU** policies in order to develop a qualification framework that is consistent with these policies
- b. Secondly, to review other projects that dealt with the issue of qualification framework to:
  - i. Identify different approaches used so far with their advantages and disadvantages
  - ii. Identify learning outcomes of other sectors that could be adopted by the sector of personal assistants such as office administrator, receptionist etc. It should be noted **that no qualification**

## framework has been developed so far for the sector of personal assistants

### Expert Meeting

The coordinator of the consortium has a long experience on the sector of personal assistants. It has designed and delivered trainings for the sector and it organises the annual conference for the sector every year. Additionally, it has close relationship with the professional body representing personal assistants (EUMA- European Management Assistants) which supports the annual conference every year. Therefore, a group (expert meeting) consisting of the committee organising the conference every year, through a meeting have:

- a. exchanged ideas that led to a list of learning outcomes
- b. Agreed on the possible levels of the qualification framework of personal assistants (levels 2 to 5)

### List of learning outcomes

Taking into account the input from the first and second points mentioned above the consortium:

- a. Compared and contrasted the list of learning outcomes produced through the literature review with those produced from the expert meeting and developed a final list of learning outcomes
- b. Related the learning outcomes to levels in a way that they conform with the EQF guidelines. It should be noted that some of the learning outcomes were clearly related to one level while for others there was a progression on the level of knowledge, skills and competence between levels. For example:

Learning outcome	Level
<i>Understand</i> methods of effective communication in the workplace	2
<i>Understand</i> and <i>explain</i> methods of effective communication in the workplace	3

### Research through questionnaires and analysis

The next step to finalise the qualification framework was to assign credits to each of the learning outcomes. The consortium decided that these credits should be aligned to the **perceived importance of three interested groups namely: personal assistants, managers and other stakeholders**. Therefore, a research was implemented (questionnaires) in the target groups mentioned above. The questionnaire included the Learning Outcomes and asked the participants to indicate their perceived importance. Additionally another objective of the research was to identify the level that would be more applicable for the countries in question ie Cyprus, Greece and Slovakia. Based on this, the assessment tool developed would assess personal assistants on that specific level, and the trainings developed would

be used to develop the personal assistants on that specific level. Questionnaire results were analysed with the aid of Microsoft Excel.

### Finalisation of qualification framework

Based on the results of the research, credits were assigned to the learning outcomes, therefore **finalising the qualification framework for personal assistants levels 2,3,4 and 5**. Additionally, for the three countries in question, all three groups denoted the main areas of work to be of level 2, which led the consortium to the conclusion that activities in the specific countries in that sector are mostly in level two (which was in fact in agreement with the partners' perceptions on the specific issue). Therefore, a decision was taken to design the qualification framework for four levels but to focus on level 2 as far as assessment, training and reassessment were concerned.

### Development of the assessment tool

Based on the qualification framework developed, an assessment tool was developed to assess the knowledge, skills and competences of a PA on each of the learning outcomes of level 2. Eupa Assessment tool is accompanied by:

1. An electronic examiner's sheet (**EUPA Electronic Assessor**) through which the assessor can assess the PA on each of the learning outcomes. Taking into account the fact that each learning outcome has been assigned a credit value, the examiner's sheet produces a total assessment mark for the personal assistant being assessed.
2. The **EUPA Current Situation Map**, which presents the current situation of the personal assistant in terms of knowledge, skills and competences as compared to an ideal situation. Moreover the Current Situation Map defines a development map for the PA being assessed.

### First assessment

After the completion of the previous step, a pilot assessment is implemented. In order to do this two different target groups are used as shown on the following table:

<b>EUPA Group A</b>	<b>EUPA Group A</b> consists of ten participants from each partner country that need to comply with the following prerequisites: a. Previous work experience of 3-5 years in a secretarial position b. No previous formal training
<b>EUPA Group B</b>	<b>EUPA Group B</b> consists of ten participants from each partner country that need to comply with the following prerequisites: a. Inactive women - women outside the labor market that do not actively search for a job during the last 5 years

	b. No previous formal training c. Interested in becoming a personal assistant
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Although all the previous stages have been completed this stage is not yet complete (some assessments have been completed though). Using the electronic evaluator the current situation map will display the learning outcomes on which improvement is needed.

*The assessment prior to the training enables us to identify possible learning outcomes that may be developed through non formal (EUPA Group A) or informal (EUPA Group B).*

### **Pilot trainings**

Based on the results of the previous steps, and more specifically of the current situation map of each personal assistant (which describes the learning outcomes on which each personal assistant needs development), PAs will attend trainings for each of the learning modules on which need for development has been identified. The key issue of this approach (added value) is the fact that the training is aligned with the qualification framework, therefore a targeted training plan can be developed for each personal assistant.

Another added value of this phase is that another group is also trained (Eupa Group C).

The characteristics of this group are:

- a. Graduate school leavers
- b. No work experience
- c. No formal training

The value added of the third group is the fact that it enables the consortium to identify those learning outcomes that can easily be developed through formal training

### **Second assessment**

In order to assess the effectiveness of the trainings a second assessment is implemented on the specific learning outcomes developed. For EUPA group C this assessment is performed on all learning outcomes This second assessment enables us to

- Identify/measure the effectiveness of the training modules
- Compare results of groups A and B with EUPA group C. This will provide us with an indication about LOs that can only be acquired as a combination of formal, non formal or informal learning

### **Evaluation strategy of EUPA**

Different evaluation methods have been used to evaluate different aspects of the project

1. **Evaluation of the meetings and events by participants** (two steering committee meetings and one train the assessor workshop has been implemented so far). Specially designed evaluation forms have been used to evaluate the meetings or events. Different parameters of evaluation have been used:
  - a. Parameters of evaluation of the meeting include:
    - i. Whether the meeting met the expectations
    - ii. To what extent the agenda reflected the issues discussed during the meeting?
    - iii. To what extent were the participants satisfied with the depth of the discussion on the issues of the agenda
    - iv. Hospitality
    - v. Coordination etc
  - b. Parameters of evaluation of the training the assessor were:
    - i. Whether the workshop met expectations?
    - ii. Duration
    - iii. Structure and flow
    - iv. Suitability to the group
    - v. Usability of the assessment tool
    - vi. etc

Later on during the life cycle of the project the trainings will be evaluated through a pre-defined evaluation form as well as other project events.

2. **Informal evaluation.** This involved reflective discussion with the project participants in order to get their feelings/evaluation of a method or an outcome. This method was extensively used after the implementation of assessments. An assessment is usually an uncomfortable situation that may provide the learner with stress. Therefore, written evaluation was not considered appropriate. Verbal evaluation after the end of the assessment was more appropriate to collect participant feelings etc.
3. **Evaluation and certification of deliverables.** This type of evaluation involved a formal evaluation of each deliverables by the partners. This evaluation related to
  - a. The evaluation of the actual result as compared to the expected one
  - b. The evaluation of the quality and value added of the result/product to the project
  - c. The evaluation of the product with reference to its costTaking the above parameters into consideration, the partners may accept or reject a deliverable. The certification procedure begins only upon the acceptance of the deliverable by the coordinator
4. **Specific structured evaluation of deliverables.** This type of evaluation applies to specific deliverables such as the qualification framework or the assessment tool. Specific key factors should be taken into account when performing evaluation of these types of deliverables such as:
  - a. The conformance with EQF and other EU policies
  - b. The innovativeness of the deliverable
  - c. The applicability in the specific sector
  - d. The possibility of transfer of the deliverable in a different sector

In the case of specific types of deliverables, the parameters of evaluation are set from the beginning in order to achieve comparability and merging of results.

### **Dissemination and exploitation strategy and activities**

The consortium believes that dissemination must be based on strategy, therefore the dissemination strategy has been defined in the dissemination strategy guide.

The dissemination strategy guide has identified 5 levels of dissemination namely:

- Dissemination for **Awareness**
- Dissemination for **Understanding**
- Dissemination for **Support**
- Dissemination for **Action**
- Dissemination for **Involvement**

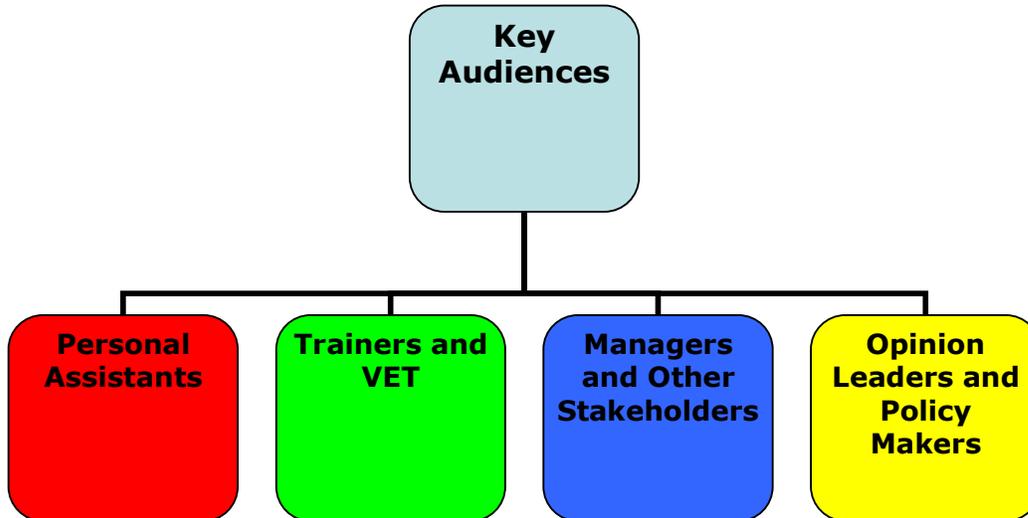
Dissemination activities have been designed for all five levels of dissemination.

Moreover it has developed the key messages to be disseminated as follows:

#### **KEY MESSAGES**

1. European Qualifications Framework and why is it important (KEY1)
2. EUPA supports the recognition of qualifications and the validation of formal, non formal and informal learning (KEY2)
3. EUPA supports PAs in their acquisition of their knowledge. It also motivates them to be involved in training activities since they can only attend the modules on which they need development. (KEY3)
4. EUPA supports improvements in quality and innovation by linking different methodological tools to different outcomes.(KEY4)
5. EUPA aims to develop and test a methodology that can then be applied in other sectors for the development of their qualification frameworks (KEY5)
6. EUPA aims to develop an assessment tool that will act as a template for the development of assessment tools for other sectors (KEY6)

The consortium has identified the following target groups:



Dissemination activities designed target all target groups

The consortium realizes the importance of dissemination activities and has been very active in this area. More specifically the following dissemination activities have been performed:

- Presentation of the project to one conference (1)
- Dissemination of customized letters to policy makers (1)
- Email campaigns (23) targeting different beneficiaries (Pas, trainers, VETS, Policy makers). 10721 emails were sent in total
- Meetings (Four - two of them to policy makers)
- Newsletters (3) disseminated to 400 recipients
- Posters (160) placed at strategic places
- Presentations (7) both to direct and indirect beneficiaries
- Press releases (11) placed to local press and on the internet
- Publication of the project on four partner websites
- Development of a dynamic project website ([www.llpeupa.eu](http://www.llpeupa.eu))
- Development of a project page on the facebook

All activities promoted **awareness**. Some activities promoted **understanding** (eg newsletters, presentation to conference), **support** (eg presentation to policy makers or opinion leaders) **action** (campaigns to EUMA members, information to opinion leaders etc) and involvement (email campaign to pas, managers and stakeholders to participate in the research or in the first assessment etc)

In addition to the dissemination activities described several exploitation activities will also be performed aiming to achieve mainstreaming and multiplication. Planned exploitation activities include:

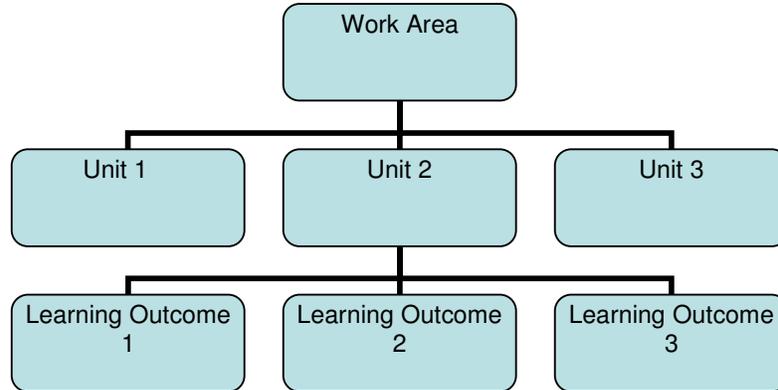
- Presentations to public bodies
- Electronic newsletters to EU Chambers, employers, Euma members
- Other activities

Sustainability of the results is ensured by the fact that all target groups are informed and involved from the beginning of the project. Sustainability is also ensured by the fact that EUPA products will be commercialized after the end of the lifetime of the project.

### 3. Project Outcomes & Results

The main project outcomes for the project EUPA so far are:

#### 1. EUPA qualification framework



EUPA qualification framework is the response to the first objective. It adopts the following structure:

A work area relates to a specific level although for some work areas there is a progression between the levels as shown in the example presented in the table below:

Work Area	Level
Basic Business Communication	Level 2
Telephone Handling/Intermediate Communication Skills	Level 3
Advanced communication skills	Level 4

Similarly to work areas, learning outcomes progress between levels. A sample of the qualification framework is presented below:

No	Areas of work	UNIT	Learning Outcome	Level
14	2.5 Maintenance of established filing system and Basic Business Documentation	2.5.1 Maintenance of an established filing system	Be able to <i>maintain</i> an established filing system	2
50	3.5 Development of a filing system for Storing and Retrieving information	3.5.1 Development of filing system	Be able to demonstrate <i>file Management skills including the design and maintenance</i> of an efficient filing system as well as the identification of the equipment or electronic methods required for filing	3

EUPA Qualification framework for 4 levels is now available (level 2 is finalised while levels 3-5 are still drafts). Qualification frameworks are now currently available on the web site of the project in 4 languages.

## **2. EUPA assessment tool**

EUPA assessment tool is an innovative tool that enables the assessment of a PA on level 2. There are 31 learning outcomes in level 2, therefore the assessment tool assesses each of the learning outcomes. The credits for each of the learning outcomes respond to the credits assigned to that learning outcome on the qualification framework.

For each of the learning outcomes the assessment tool presents

- The assessment criteria
- The methodological tools to assess these criteria (EUPA assessment tool is a two dimensional tool linking learning outcomes with methodological tools )

Different types of assessment methodologies are used such as:

- Reflective discussions
- Observations
- Multiple choice
- Knowledge tests/Written exercises
- Role plays
- E-assessments
- Portfolio of evidence
- Witness testimony

For example, to assess telephone communication a role play is a more suitable methodological tool than a written exercise, Additionally, the assessment tool provides assessors with the key points they should look for during the assessment (in case of reflective discussions) or the correct answer in case of a multiple choice etc,

EUPA assessment tool is accompanied with assessors pack which provides assessors with different grids to facilitate the assessment using the techniques mentioned above

It should be noted that one of the objectives of EUPA is to convert the assessment tool into an assessment template to be used in the assessment of qualifications of different sectors. This will be done during the phase of the project: Project findings, results and conclusions.

EUPA assessment tool is a confidential product. Interested parties may communicate with the coordinator on [eu@mmclearningsolutions.com](mailto:eu@mmclearningsolutions.com)

Other major achievements of the project include:

1. Training of assessors to use EUPA assessment tool including the development of assessors training pack which includes several grids to assist the assessors to assess PAs

2. Pas first assessment using the EUPA assessment tool in Cyprus, Greece and Slovakia
3. Composition of dissemination strategy guide (a very important tool to monitor the dissemination strategy)
4. Composition of project management reference guide (a very important tool for the management of the project)
5. Production of dissemination material such as newsletters and posters.

## 4. Partnerships

The multi-country partnership provides European added value to the project since EUPA aims to develop a European certification for personal assistants. The specific selection of countries also adds value because based on the EU inventory of validation 2007, EU countries are divided into three groups: those countries where validation has become a practical reality, those countries where validation is emerging as a practical reality and those countries where activity is low or non-existent. The partnership of EUPA is a combination of all three countries: France and UK are in the first category, Sweden is in the second category, Cyprus, Greece and Slovakia are in the third category. It should also be noted that the first assessment, the trainings and the second assessment happen in the countries of the low activity, thus promoting awareness of the issue of Validation of formal, non formal and informal learning.

## 5. Plans for the Future

Future plans include firstly the completion of the project and the submission of high quality of results. The first phase of the project can be described as “**the development phase**”. The current phase is the phase of the **pilots** and the phase that will follow is the phase of **conclusions**. The consortium considers the third phase as vital since thorough analysis of the results of the pilots, may provide the consortium with valuable information on the methodological tools that should be used for formal training (eg learning outcomes that prove to be easily developed through informal learning may lead us to the conclusion that the training for these learning outcomes should include experiential tools or reflection). The conversion of EUPA assessment tool into an assessment template will also be based on these findings.

It should be noted here that even the results that are considered to be final may be adopted during the phase of the conclusions. Possible adaptations may include modifications of the assessment tools used in EUPA Assessment Tool or changes in the expressions of learning outcomes. The project is dynamic and its products should be continuously improved .

Another phase to the project begins after its completion: The phase of sustainability of results. Sustainability is ensured through the dissemination and exploitation of results. After the end of the project EUPA will be commercialised. The coordinator is already working on an application for the approval and subsidisation of EUPA level 2 by the Human Resource Development Authority in Cyprus. The commercialisation of EUPA by partners is currently been discussed and is a main issue of the next steering committee meeting.

## 6. Contribution to EU policies

EUPA promotes the policy of “**Recognition of Qualifications**”, through the validation of formal non formal and informal learning.

The Lisbon European Council in 2000 concluded that **increased transparency of qualifications** should be one of the main components of the education and training systems in the Community, in order to adapt to the demands of the knowledge society.

The Council Resolution of 27 June 2002 on lifelong learning invited the Commission, in close cooperation with the Council and Member States, **to develop a framework for the recognition of qualifications for both education and training**, building on the achievements of the Bologna process and promoting similar action in the area of vocational training.

The joint reports of the Council and the Commission on the implementation of the ‘Education and Training 2010’ work programme, adopted in 2004 and 2006, stressed the **need to develop a European Qualifications Framework**. In the context of the Copenhagen process, the conclusions of the Council and the representatives of the governments of the Member States, meeting within the Council of 15 November 2004 on the future priorities of enhanced European cooperation in vocational education and training gave **priority to the development of an open and flexible European Qualifications Framework**, founded on transparency and mutual trust, which should stand as a common reference covering both education and training.

The validation of non-formal and informal learning outcomes should be promoted in accordance with the Council conclusions on common European principles for the identification and validation of non-formal and informal learning of 28 May 2004.

The Brussels European Councils of March 2005 and March 2006 underlined the **importance of adopting a European Qualifications Framework**.

In addition to the priority “**Transparency and recognition of competences and qualifications**”, EUPA supports the priority of “**developing the quality and attractiveness of VET systems and practices**” since it aims to propose the identification of learning outcomes that may be easier to develop through working experience or through life as opposed to others that may be easier to acquire through formal learning. This innovative approach will have significant implications to the design of curricula and especially on the methodological tools involved in each module (eg simulation for learning that can be acquired through work experience). For the same reason EUPA supports the objective “**to support improvements in quality and innovation in vocational education and training systems, institutions and practices**”

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