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## Defined criteria for memoranda of understanding and learning agreements for the promotion of mobility and permeability

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**LEONARDO DA VINCI TRANSFER OF INNOVATION PROJECT  
“PROPER CHANCE – IMPLEMENTING ECVET IN THE FIELD OF HEALTH AND SOCIAL CARE FOR THE PROMOTION  
OF PROFESSIONAL PERMEABILITY AND GEOGRAPHICAL MOBILITY”  
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For more information on the project “PROPER CHANCE” go to our website  
[www.proper-chance.eu](http://www.proper-chance.eu)

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## 1 Foreword: Criteria for memoranda of understanding and learning agreements for the promotion of mobility and permeability in the project “PROPER CHANCE”

It is the objective of the LdV Transfer of Innovation Project “PROPER CHANCE” to support professional permeability and mobility for workers in the field of health and social care by promoting the use of ECVET to support transparency and recognition of learning outcomes and qualifications, including non-formal and informal learning.

One of the means for achieving this objective is, according to the European Parliament’s “Recommendation on the establishment of a European Credit System for Vocational Education and Training (ECVET)”<sup>1</sup>, the conclusion of a Memorandum of Understanding between the project partners, accompanied by a template for individual learning agreements for the implementation of learner mobilities.

The European Parliament’s recommendation states that the following criteria shall be included in a Memorandum of Understanding:

“The MoU should confirm that the partners:

- accept each other's status as competent institutions,
- accept each other's quality assurance, assessment, validation and recognition criteria and procedures as satisfactory for the purposes of credit transfer,
- agree the conditions for the operation of the partnership, such as objectives, duration and arrangements for review of the MoU,
- agree on the comparability of qualifications concerned for the purposes of credit transfer, using the reference levels established by EQF,
- identify other actors and competent institutions that may be involved in the process concerned and their functions.”<sup>2</sup>

For the development of Learning Agreements, the European Parliament gives the following recommendations:

“It [the learning agreement] should:

- distinguish between competent ‘home’ and ‘hosting’ institutions,
- specify the particular conditions for a period of mobility, such as the identity of the learner, the duration of the mobility period, learning outcomes expected to be achieved and the associated ECVET points.
- [...] lay down that, if the learner has achieved the expected learning outcomes and these have been positively assessed by the ‘hosting’ institution, the ‘home’ institution should validate and recognise them as part of the requirements for a qualification, according to the rules and procedures established by the competent institution.”<sup>3</sup>

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<sup>1</sup> RECOMMENDATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 18 June 2009 on the establishment of a European Credit System for Vocational Education and Training (ECVET). Available for download under: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:155:0011:0018:EN:PDF> (Date: 20.02.2013)

<sup>2</sup> *ibid.*, p. C 155/16

<sup>3</sup> *ibid.*, p. C 155/16 f.

The partners of the project “PROPER CHANCE” found that all above mentioned criteria are essentially to be included in a set of documents which is constituted by the Memorandum of Understanding and the Learning Agreement. However, it largely depends on the nature and objectives of the partnership which is concluded by the Memorandum of Understanding, which criterion should be included in which of the two document types.

The project consortium envisaged concluding a multilateral agreement among all seven project partners. The Memorandum of Understanding is thus to be an “umbrella agreement” for the partnership between the institutions, leaving a number of specifications to be decided in the learning agreements. This also proves to be advantageous for the purpose of involving more partners into an international network of institutions, which aim at promoting permeability and mobility in the health and social care sector. The details of the further cooperation and mobilities are thus included in the Learning Agreements.

Other European partnerships of VET institutions, employers and other organisations might find it more practical to agree on more issues in more detail concerning learner mobilities in the Memorandum of Understanding, thus specifying the nature of the partnership more intensely, and leaving comparatively few decisions and individual arrangements to the learning agreement. However, this decision is up to every project consortium and depends largely on the nature of the intended partnership.

The criteria which are detailed in the following pages have been included in the Memorandum of Understanding and Learning Agreement in the LdV Transfer of Innovation Project “PROPER CHANCE” and are recommended for inclusion in the two documents. The document shall serve as a guideline for other European institutions, which intend to implement learner mobilities as well as to contribute to transparency and permeability on the European education and labour market.

## 2 Criteria to be included in a Memorandum of Understanding

### a. Objective of the Memorandum of Understanding

The first paragraph states the document's objective. In the context of ECVET, objectives usually refer to the promotion of transparency of learning outcomes, of vertical and horizontal permeability in and between the educational systems as well as of international mobility of learners and employees.

*Example: This MoU sets out the general framework of cooperation and networking between the partners with the objective of designing specific arrangements for the assessment, validation and recognition of learning outcomes for the implementation of learner mobilities.*

Furthermore, the Memorandum of Understanding should state that the partner institutions accept each other's status as competent institutions:

*Example: The partner organizations mutually accept their respective criteria and procedures for quality assurance, assessment, validation and recognition of knowledge, skills and competence for the purpose of transferring credit.<sup>4</sup>*

### b. Identification of partners and qualifications

The following data are to be detailed for every partner organisation:

- Name of the organisation
- Address
- Postal code/ City
- Country
- Legal representative
- Position of legal representative
- Contact person
- Position of contact person
- Telephone number of contact person
- E-mail of contact person
- Short description of the organisation including fields of activity and general objectives

If a specific qualification or training programme (or several of these) are subject of the Memorandum of Understanding, these qualifications or training programmes should be detailed as well:

- Title of qualification (original language)
- Title of qualification (English)
- Relevant legal framework (if applicable)
- EQF / NQF level (if applicable)
- Comments, including reference to the comparability of the qualification with regard to other qualifications for the purposes of learning outcome recognition, using the reference levels established by EQF

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<sup>4</sup> from: ECVET Users' Guide working group (2012): Memorandum of Understanding - Draft version for testing. Available for download under: <http://www.ecvet-team.eu/en/content/ecvet-european-templates> (Date: 20.02.2013)

### c. Activities to be implemented

All activities, in which the partners engage in aiming at the objectives described in section a., are to be detailed in this section. It has proven convenient to differentiate between activities which are to be undertaken by all partners and special engagement of the different partner institutions according to their expertise, objectives and role in the partnership.

This section should contain among others information on the following aspects:

- Commitment of the partners to implement learner mobilities, which means
  - o for sending institutions:  
providing counselling to interested target groups (learners and workers) with the aim of initiating their participation in a transnational mobility; in case of declaration of intent by a learner, negotiating the organizational framework of the mobility, leading to the signature of a learning agreement between the learner and two parties (sending and hosting institution),
  - o for hosting institutions:  
Support learners and workers by supporting the search for work placements and suitable qualification programmes as well as by assessing learning outcomes providing personal transcripts of assessed learning outcomes; negotiating the organizational framework of the mobility, leading to the signature of a learning agreement between the learner and two parties (sending and hosting institution).
- The multilateral acceptance of the partners as competent institutions, which is usually constituted by:
  - o Commitment to assess learning outcomes in the role of the hosting organization based on common assessment standards (which are either to be attached to the Memorandum of Understanding or are to be decided for each learning agreement) and to issue a certificate (personal transcript) to document acquired learning outcomes
  - o Commitment to validate and recognize the learning outcomes assessed by a partner institution based on common standards and templates.
- Reference to the learning agreement, in which further criteria are detailed (Learning outcomes to be achieved by the learner(s) involved, criteria and procedures for the assessment, validation and recognition of these learning outcomes, organizational details of learner mobility (travel data, insurance etc.))
- Evaluation of each implemented mobility, for example on the basis of the “Checklist for using ECVET for transnational mobility”<sup>5</sup>, and exchange of the evaluation results among the partners with the aim of continuously improving mobility implementation.

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<sup>5</sup> European Commission, Directorate General Education and Culture (2012): Using ECVET for Geographical Mobility (2012). PART II OF THE ECVET USERS’ GUIDE, p. 27 ff.

Depending on the context of the Memorandum of Understanding and the nature of the partnership, the following further criteria can be specified:

- Continuation of multilateral comparison of learning outcomes suitable for mobilities of learners from the involved institutions, and their acceptance among local, regional or national stakeholders.
- Continuous development of common methodologies and instruments for the assessment, validation and recognition of learning outcomes in order to provide and improve all requirements for the implementation of learner mobilities.
- Commitment to dissemination activities by all partners (e.g. informing local, regional or national stakeholders about opportunities of learner mobilities and international recognition of learning outcomes).
- Provide access to the regional network of training centres and / or employers in order to create more opportunities for international cooperation and student mobilities.
- Foster the development of training courses, assessment tools and procedures for the recognition of learning outcomes in order to facilitate the recognition of learning outcomes, for the implementation of both permeability between qualifications and student mobilities.
- Support other VET providers in developing partnerships by providing guidelines and templates for learning outcome comparison, memoranda of understanding and learning agreements, as well as by sharing experiences.

Details on the roles and responsibilities in the implementation of learner mobilities are to be described in the learning agreement.

For the promotion of permeability and mobility as well as of the assessment, validation and recognition of learning outcomes achieved abroad, the partners should agree on a set of common documents in the beginning of the partnership. These documents are:

- Common methodologies for description and comparison of learning outcomes
- Common assessment standards
- Common templates for learner mobility implementation:
  - o Learning Agreement and
  - o Personal Transcript

The partners should confirm the usage of these documents with the signature of the Memorandum of Understanding.

#### **d. Validity Period**

The validity of the Memorandum of Understanding has to be specified. Usually, a validity period of two to four years is chosen. However, depending on the nature and objectives of the partnership, the duration can be longer or shorter.

Furthermore, the partners can agree on regular intervals of review processes and on regulations for (automatic) prolongation of the Memorandum.

### e. Attachments

According to the specifications made above, the following documents can be attached to the Memorandum of Understanding:

- Learning outcome descriptions of the relevant qualifications
- Common methodologies for the description and comparison of learning outcomes
- Assessment Standards
- Template of Learning Agreement
- Template of Personal Transcript

### 3 Criteria to be included in a Learning Agreement

#### a. Parties Involved

The parties involved are

- one or several learners (aiming at the same qualification, the same learning outcomes etc.),
- a sending institution, and
- a hosting (or receiving) institution.

The following details should be given about the **learner(s)**:

- Family name
- Name
- Address
- Postal code/ City
- Country
- E-mail
- Telephone number (international format)
- Date of birth/ Nationality
- Qualification which is targeted *or* which has already been completed
- Period for learning mobility (including total number of working days)

The following data are to be detailed for the **sending and hosting institution**:

- Name of the organisation
- Address of the organisation
- Country
- Legal representative
- Position of legal representative
- Contact person
- Position of contact person
- Telephone number of contact person
- E-mail of contact person

#### b. Brief description of the units of learning outcomes to be achieved during learner mobility

The learning outcomes, constituted by a coherent set of knowledge, skills and competences, which are to be achieved during the learner mobility are to be specified in this section.

If the partners already work with pre-defined units of learning outcomes, they can be included in the learning agreement. However, it is not always necessary to include the complete unit in the Learning Agreement. Under consideration of the duration of the learner mobility, it might be more appropriate in many cases to only include a part of it.

Furthermore, always consider that the hosting organisation will normally assess the achieved learning outcomes. The more concrete they are described, the easier it is to assess them.

If the learning outcomes description is rather extensive, it is recommended to attach the learning outcome description to the Learning Agreement. If the partners already have set up common learning outcome descriptions, a short reference to the relevant documents is usually enough.

### c. Assessment method and criteria

This section of the learning agreement should include:

- a statement on which assessment instrument(s) will be used to assess which (unit of) learning outcome(s)
- the criteria and indicators used for assessment – these can be provided in the form of an assessment template and / or grid in the annex of the learning agreement.

If applicable, a part of the assessment can be carried out at the home institution, for example by the means of a self-reflection report after the learner's return.

It is advantageous if the sending and hosting partners already have agreed on common assessment standards, for example in a Memorandum of Understanding.

Common assessment standards usually detail:

- General quality requirements for assessments
- Assessment process
- Assessors and assessment team
- Structure of an assessment task
- Assessment instruments (written tasks, expert discussion, work samples and so on)
- Assessment templates and grids which include assessment criteria and indicators
- Documentation and certification of assessment results.

### d. Procedures for the validation and recognition of learning outcomes

This section should state who is responsible for the validation and recognition of the assessed learning outcomes at the sending (home) institution (teachers, counsellors, etc.).

Additional tools, which support the validation and recognition process (e.g. reflective conversation with the learner), can be specified.

### e. Practical details

For specifying the practical details of the learner mobility, the following table and the information contained therein have proved valuable:

Arrival Date <i>OR</i> Earliest possible arrival date	
Departure Date <i>OR</i> Latest departure date	
Duration of Internship	No. of working days.
Means of transport (plane, train, etc.)	e.g. define airports and / or train stations which are most convenient for travelling to the destination
Insurance	Include information on who will assure which kind of insurance: <ul style="list-style-type: none"> <li>- health insurance</li> <li>- liability insurance</li> <li>- accident insurance</li> </ul>

Accommodation	<ul style="list-style-type: none"> <li>- Specify kind of accommodation (e.g. shared flat, host families, student dormitories)</li> <li>- Specify subsistence arrangements</li> <li>- If applicable, detail the facilities (e.g. no. of persons per bathroom, washing machine etc.)</li> <li>- Give the address.</li> </ul>
Programme and calendar of activities	Include information on arrangement on arrival day, introductory meetings, contact persons, language and cultural introduction courses, working hours, weekend events, feedback sessions etc.

#### f. Qualification being prepared by the learner and progress in the learning pathway

The following table and the information contained therein have proved valuable:

Qualification being prepared by the learner	
EQF/GQF level	
<b>Information on where the learner is in his/her learning pathway</b>	
<ul style="list-style-type: none"> <li>- Year of training and / or percentage of qualification completed</li> <li>- Relevant fields of learning, which already have been completed</li> <li>- If applicable, experiences in internships</li> </ul>	

#### g. General rules and obligations for the learner

It is recommended to include a list of rules and obligations for the learner during the mobility period, for example:

- To respect the rules of the hosting country, to behave and obey the hosting contact person
- To attend to the training activities included in the exchange programme
- To identify a responsible person both in the hosting and sending institution
- To have a public liability insurance which will cover the learners/ students while abroad

#### h. Responsibilities

Use the following checklist to summarize the responsibilities of the three parties involved in the Learning Agreement and to assure successful learner mobility implementation.

<i>Checklist of activities</i>	<i>Who does what?</i>		
	<b>Sending institution</b>	<b>Hosting institution</b>	<b>Learner</b>
<b>Description</b>			
Learning Outcome Assessment <sup>6</sup>			
Validation and Recognition of Learning Outcomes			

<sup>6</sup> A reference to section d "Procedures for the validation and recognition of learning outcomes" for detailed information is recommended.

Arranging practical details:			
- Travel			
o Travel from place of residence to airport in hosting country (Airport XX)			
o From airport (Airport XX) to place of residence in hosting country			
- Accommodation and subsistence			
- Transport			
- Programme of activities			
<b>Legal documents and insurance</b>			
- Placement agreement			
- Liability insurance			
- Health insurance			
- Accident insurance			
<b>Issuing Transcript of records including:</b>			
- Europass			
- Units of learning outcomes completed during mobility			
- Internship Certificate			
- Certificate on language training			
Language and cultural introduction of the learner			

#### i. Signatures and Attachments to the Learning Agreement

The learning agreement is to be signed by all three participating parties, which are the sending and hosting institutions and the learner, before the learner mobility starts.

According to the specifications made above, the following documents can be attached to the Learning Agreement:

1. Memorandum of Understanding
2. Units of learning outcomes to be achieved during mobility period
3. Assessment templates and grids
4. Schedule for Language and cultural introduction of the learner
5. Financial Aspects: Calculation of Subsistence Costs for Mobility Period