



Quadultrainers

Towards a European Qualification Prototype for Adults Trainers

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Progress Report

Public Part

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Executive Summary

In the first year of this project a lot of preliminary work has been done to prepare a European Qualification Standard for two types of functions in the Adult Learning environment.

During several sessions of Steering Committee, Advisory Board and Partner Meetings a Competence Framework has been decided upon for the expert adult trainer and the adult learning professional.

Especially the meeting with the Advisory Board and the following Concertation Seminar in Rome on the 23rd and 24th of March 2009 contributed greatly to the knowledge and acceptance of the Action Plan, Research Framework and Competence ideas. Advisory Board members each gave helpful contributions on their speciality and expertise.

A setback to the project may be seen in the crisis which occurred in the financial sector in the autumn of 2008. Due to the major impact on several of the participating partners some of the workpackages have encountered some delay in the outcome of their products and reports. These delays have in no way interfered with the whole of the project.

A second result of the worldwide economic crisis can be seen in the appearance of several updated plans throughout the entire project. The updated plans contain more and better information necessary to provide partners and networks with detailed information regarding the project and its outcome.

For instance, in order to produce a well developed State of the Art Report and subsequently a Competence Framework, part of the research done at the end of 2008 into this has been repeated in the summer of 2009. Response has slightly improved in numbers, but largely improved on content and accuracy. Febelfin has performed a major task in this as well as Scierter did on their part of this report. We now hold a report which is based on the actual state in all participating countries of the project and moreover several important EBTN members.

During the second year of the project Partners will implement the European Qualification Prototype among their respective national members and partners in order to get feedback on the prototype. The European Qualification Prototype will be decided upon during the second Concertation Seminar in Lisbon on the 28th of January 2010.

As a result of the implementation of the European Qualification Prototype partners will be able disseminate, validate and promote this project in their national surroundings and networks as foreseen in the workpackages 5, 6 and 7.

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1. Project Objectives

Supporting the professional and personal development of adults is a key “profession” in the knowledge society.

The professional identity of adults trainers is a very valuable asset to implement a policy of lifelong learning in Europe, as is stated in the policies document and research reports (ETUC, UNICE, CEEP “Framework of actions for the life long learning development of competence and qualification”, 2002, Euridyce “ National action to implement Life long Learning in Europe, 2001, Structure of education, vocational training and adult education system in Europe, 2007, Niace Final report for Study on Adult Education Providers, 2006 Adult education trends and issues in Europe, 2006, The Helsinki Communiqué, 2006).

Several Member States have recognised the specificity of Adults Trainers and have established -mostly by initiative of professional associations- qualification frameworks and professional certificates. However, mobility of trainers, and recognition of trainers’ qualifications is constrained by the lack of a common -and consensus based- authentically European qualification and competence framework.

While the European Qualification Framework is proposed as a “translator” among national qualifications, adults trainers, who have a key role to utilize, explain and evaluate such a device, have no common reference scheme to define their qualification and competency profile. This is an obstacle to mobility and recognition not only at trans-national level within Europe, but also at the trans-sectoral level within the same country (e.g. from corporate training to the continuing training department of a University, or from adult education centres to re-conversion of over-45 unemployed workers). In addition to this, the use of ICT in work and learning is creating new challenges and new opportunities to adult learners and their trainers, which requires a serious review of existing qualifications if they exist at national level.

Finally it must not be forgotten that most EU countries have no qualification framework of trainers at all. The decision to start the development of a competence framework in the Financial Services Sector comes from the large experience it has in terms of vocational training and certification processes. The Financial Services Sector (banking, insurance, investment) is a €55 trillion capitalised industry, with more than €17 trillion in the EU. The sector is critical to the well being of Europe’s economy, generating considerable foreign income and ensuring efficient use of resources. The national Financial Services Sector reflect their very different histories in their national institutional set-ups, legislation and regulatory frameworks, cultures and education/VET systems. On that sense, the Financial Services Sector has detected the need to invest resources on human capital by teaching, training, coaching, and mentoring their employees.

It goes without saying that the competence system prototype developed in QUADULTRAINERS will be designed to be immediately transferable in other learning sectors and “territories” throughout Europe.

Aim: This initiative aims at increasing the recognition, the social prestige and the attractiveness of the adults trainers profession by proposing -through a multistakeholder research and consensus building process- a European Qualification Prototype for Adult Trainers.

Objectives:

- A. To mobilise professional associations in this domain to collect their views on existing needs/opportunities and on the implementation framework that would be needed to implement a European Qualification in this domain.
- B. To achieve a complete and articulated picture of what is already in existence in every Member Country and at European level in the different institutional and organisational contexts in which the trainers of adults operate.
- C. To build -through an open dialogue among all involved categories of stakeholders- a European definition of the professional area and a representation of the related competencies and levels of performance/expertise, using EQF as a reference point.
- D. To propose a co-operation framework among national and international associations and institutional actors, that would allow the delivery of general and specialised professional qualifications.
- E. To consider -among the associated networks and the institutional interlocutors- the feasibility of an associative technical coordination mechanism to guarantee European Qualifications for Adult Trainers, focusing its initial activity on the trainers of adult learners in the different working contexts (industry, finance, public administration, non-profit organisations, school, health, service, armed forces, adult learning centres, etc.).

2. Project Approach

The project activities have been developed through 9 workpackages which are strictly inter-dependent in order to assure coherence and maximise the effectiveness of the whole QUADULTRAINERS actions.

Project management (WP8), Valorisation and Dissemination actions (WP6), Exploitation (WP7) and Evaluation, Monitoring and Quality Assurance (WP9) can be considered transversal activities along the project life-cycle. Those workpackages accompany the project development and assure that the project is monitored, managed in a cost-effective manner and meet the quality criteria identified as well as project intermediate and final results are valorised and disseminated in a continuous and stable manner.

QUADULTRAINERS project partnership believes that management, evaluation and dissemination should be and have to be embedded in all project activities and not only performed in specific and strict schedule time.

Workpackage 1, *Awareness Raising and Network Building* and workpackage 2, *Open Review and comparative Analysis of the state of the art of the existing qualification and competence framework*, have been carried out almost in parallel. Within these workpackages (1 and 2) all the project stakeholders will be involved in order to set up a consensus building mechanism on the intermediate and final results as well as promote a participative co-design of the main project outputs. In other words within the workpackage 1 a Concertation Seminar was envisaged in order to design outputs which are relevant, coherent and immediately transferable and applicable in the different contexts. The QUADULTRAINERS network is the source pool of the project.

The Concertation Seminar served different purposes:

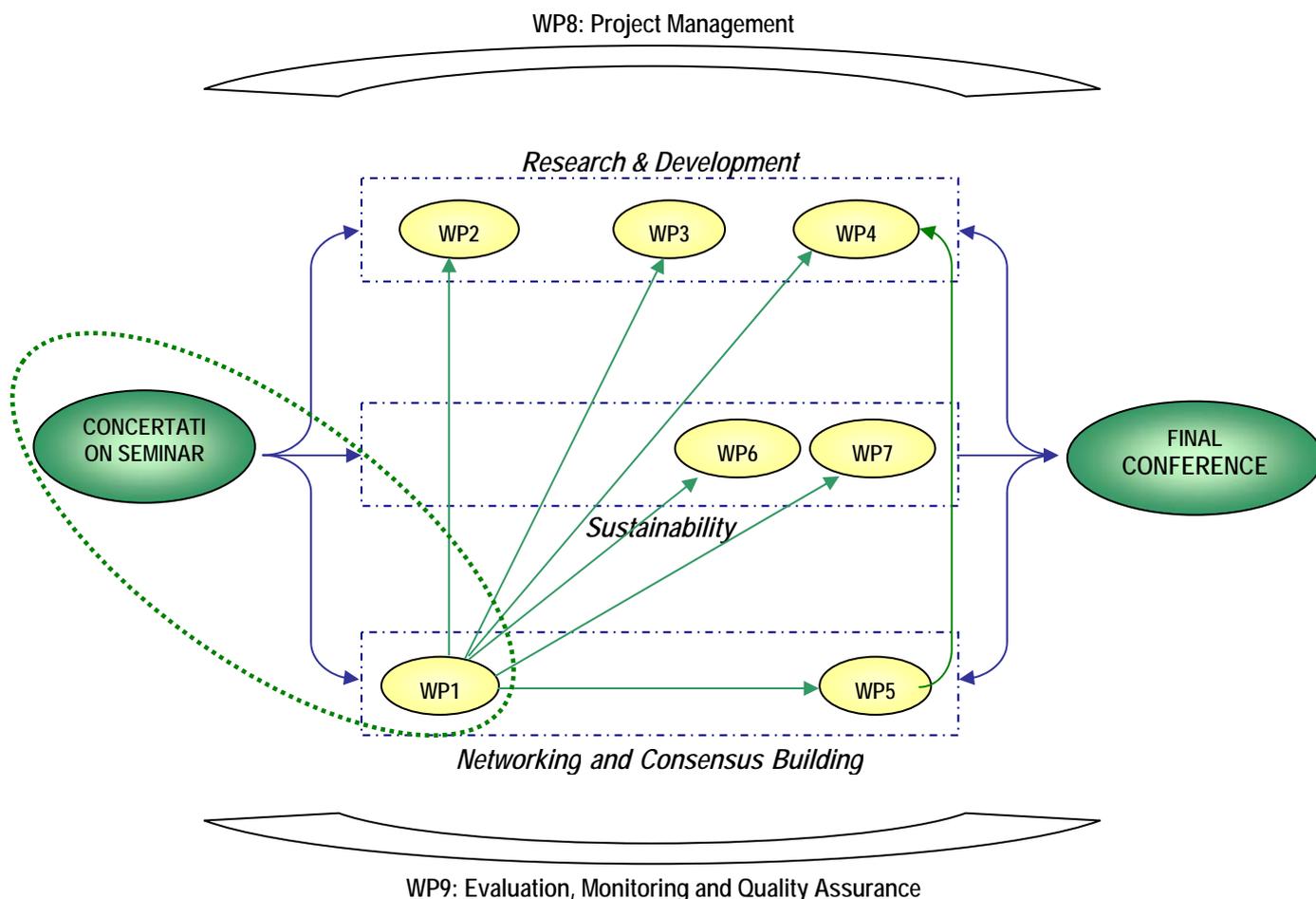
- a) support the design and the development of QUADULTRAINERS outputs through the identification of need, priority areas for certification and the collection of existing qualification and competences frameworks across Europe with especial reference to the trainers of adults.
- b) promote the dialogue amongst different actors and visions of identification, recognition and certification of competences for Adult trainers.
- c) assure sustainability and dissemination of the project output.

As far as the workpackage 2 is concerned, project partners carried out a desk research both on the FSS as well as on other relevant learning territories in which the competences of Adult Trainers/Facilitator are playing a key role. In particular the research focused on identifying and mapping specific regulations and existing certification/accreditation solutions in Europe. Workpackage 3 (*Competences Framework*) aimed at designing a model of competences for adult trainers which allows the establishment of consistent standards, the promotion of quality, increasing assets, transfer and progression opportunities and being able to understand and compare qualification at a European level. The qualification framework will allow certification of knowledge and skill that a trainer has achieved through study, training, work and life experience.

The main output of the workpackage 4 (*European Qualification Prototype*) will be the European Qualification Prototype which will be constitute of:

- 1) A clear description of a qualification specific to the FSS.
- 2) An explanation of a process to certify those competences (Methodological Guidelines).
The methodological guidelines will support the adoption, the contextualization and the correct usage of the system.

The European Qualification Prototype will be tested and validated through a piloting activity (WP5). After the piloting face a transferability plan will be design in order to assure that the European Qualification Prototype, will be immediately transferable and usable (WP6)



The following scheme summarises the methodological process of the project:

WP1	Awareness Raising and Network Building	WP6	Valorisation and Dissemination
WP2	Open Review and comparative Analysis of the state of the art of the existing qualification and competence framework.	WP7	Exploitation
WP3	Competences Framework	WP8	Project Management
WP4	European Qualification Prototype	WP9	Evaluation, Monitoring and Quality Assurance.
WP5	Validation and Piloting		

3. Project Outcomes & Results

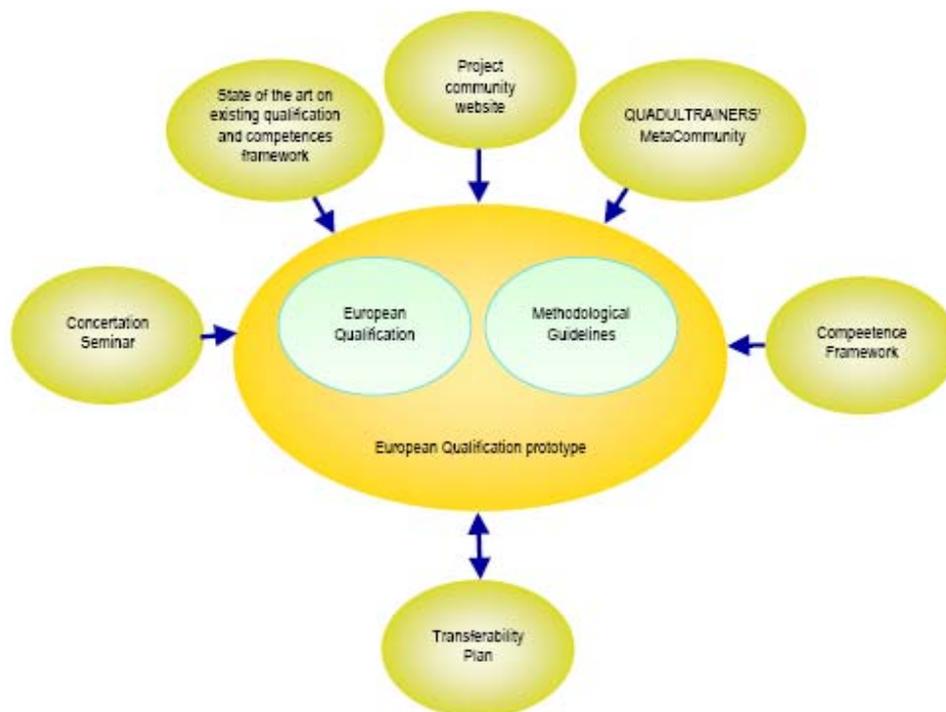
The most valuable result so far is the agreement upon a Competence Framework for the Expert Adult Trainer (name to be decided in January) and the Adult Learning Professional (name to be decided in January).

These Frameworks will result in a European Qualification Prototype for these two functions in the field of adult training expertise.

Both these competence frameworks are to be recognized within all Partner countries and their networks.

The overall outcome of the project will be the **European Qualification Prototype** for the competences of adult trainers.

The following graph presents the major outputs of the project:



The **European Qualification Prototype** will be constituted by a European Qualification plus the **Methodological Guidelines** for its application. To create the prototype the following outcomes of the project act as input of the prototype constitution process:

- Concertation Seminar 23rd and 24th of March 2009
- QUADULTRAINERS' MetaCommunity
- State of the art report on existing qualification and competences framework
- Competences Framework.
- Project community Website

The **Transferability Plan** will be the next step once the European Qualification Prototype has been created. After the validation and testing process, the transferability plan acts as an input to improve the prototype.

In order to efficiently manage the project, assure the development, the dissemination, sustainability, and exploitation of project results a set of complementary/additional outputs is envisaged:

- Action plan for the activation of the European Learning Networks (deliverable 1)
- Research Framework (deliverable 1)
- Validation and Piloting report (deliverable 4d)
- Dissemination Plan (deliverable 9a)
- Articles and Publications (deliverables 11)
- Final Conference (deliverable 12)
- Exploitation Plan (deliverable 14)
- Project Management and Communication plan (deliverable 15)
- Project Interim and Final report (deliverable 16)
- Minutes (deliverable 17)
- Evaluation Report (deliverable 18)
- Final Evaluation Report (deliverable 15)

4. Partnerships

Summary table of partners			
Partner number	Country	Legal name	Type
P1 NIBE-SVV	NL	NIBE-SVV BV	EDU-ADLT
P2 EBTN Asbl	LU	European Banking & Financial Services Training Association Asbl	NFP-ASC
P3 SCIENTER	IT	Scienter Soc. Cons. A R.L.	RES – PRV
P4 AIF	IT	ASSOCIAZIONE ITALIANA FORMATORI	ASC-TRNee
P5 FEBELFIN ACADEMY	BE	Febelfin Academy VZW	EDU-VET
P6 HWR (FHRV-Berlin)	DE	Fachhochschule für Verwaltung und Rechtspflege Berlin	EDU-UNIV
P7 IFB	PT	IFB – Instituto de Formação Bancária	ADU-VET

Partner 1:

NIBE-SVV is the leading education, education and examination facilitator for the financial services sector in the Netherlands.

NIBE-SVV has two shareholders: The Netherlands Bankers Association and the Dutch Association of Insurers. The organisation services more than 40.000 students a year with training and educational programmes on different levels and a wide range of subjects. More than 150 training programs are delivered as self tuition courses, face to face training or through the E-learning environment of NIBE-SVV: Studienet.

More than 40.000 students follow the courses each year. Around 400 trainers are involved as a trainer or tutors in the E-learning environment. NIBE-SVV has his own trainers development department and programs.

NIBE-SVV runs major tailor made training projects for all the financial services institutions in the Netherlands (ABN AMRO, Fortis, ING, AEGON, RABO etc.).

Further on NIBE-SVV has a publishing house that publishes two major magazines for professionals in the financial service sector and has a specialized fund of books on financial services subject matters. NIBE-SVV has gained a wide international experience in projects in Eastern Europe in which NIBE-SVV did the project management and content- and exam development in close relation with its counterparts.

Partner 2:

The European Bank Training Network Asbl (EBTN) was established on 4th November 1991 as a non-profit association, made up of the leading bank training organizations in Europe. In June 2007, the legal name of the Network was changed in “European Banking & Financial Services Training Association (EBTN Asbl Asbl)”. Its Registered Office is located in Luxembourg. Members are Associations, Institutions or Companies having an established relationship with representative national banking and financial associations or an established relationship with the majority of the national banking and financial services institutions. Members can be Full Members, Associate Members and Affiliate Members. EBTN Asbl’s main objectives and its expertise fields related to this project are: to promote and coordinate actions related to banking and financial services education and training activities with the main aim of developing the professionalism of employees in the Banking and Financial Sector; to accredit training programmes and providers and/or certify knowledge and competences in the FSS; to liaise with the EU authorities and any other competent authorities and organizations in matters relating to banking and financial services education and training. In 2003, EBTN Asbl officially launched the European Certificate EFCB – European Foundation Certificate In Banking of which more than 5000 certificates have already been issued in Europe. Furthermore, the implementation of a Certification & Accreditation System for Financial Services Sector in Europe is expected under the EBTN Asbl project CERTIFIED. Moreover, EBTN Asbl is the legal owner and supervisor of the IBSS – International Banking Summer School which 61th Edition will take place in Hong Kong in Summer 2008.

Partner 3:

SCIENTER, a centre for Research and Innovation for training was established in 1988 as a non-profit consortium organisation, which includes the University of Bologna among its shareholders. During its twenty years of existence SCIENTER has become recognised as one of the leading European research centre in the field of Distance Learning carried out activities throughout European Community. Science’s areas of expertise include research and evaluation in the field of Open Distance Learning (ODL) and eLearning; innovation in learning processes using Information and Communication Technologies (ICT); the training of trainers and teachers in the field of ODL and eLearning; the development of projects involving learning Regions and organisational learning; innovation in training methodologies, paying particular attention to the planning, monitoring / documentation and evaluation of programmes, projects and courses; analysis and evaluation of Education and Training policies; labour market and training/learning needs analysis. Scienter is a member of the MENON Network, a European research and innovation network, eif-EL (European Institute for E-Learning) and of the European Quality foundation in eLearning (EFQUEL).

Partner 4:

ASSOCIAZIONE ITALIANA FORMATORI (AIF) -is a non-profit association, self funding professional organization whose members work in the field of Training and Human Resource Development. AIF has the following aims: to enhance the professional development of its members, to act as a reference centre, to promote debates, conference and cultural activities in educational field, to provide information services and organize professional up-to-date training opportunities for its members. AIF has as its members a wide-range of experts who work in the field of adult education in organizational contexts. The organizations range from large companies, both private and public, to public administration both local and national, from Trade Unions to Cooperative Enterprises. AIF members range from basic technical skill trainers to consultants in the field of organizational development, change and strategy.

Membership of AIF is open to those with professional interest in training, human resource development and adult education.

Partner 5:

Febelfin Academy is the finance training provider in Belgium. They offer short-term and long-term professional accredited training courses in finance. Key-components of the training offer are also officially recognised by the Belgian supervisory authorities.

Partner 6:

Hochschule für Verwaltung und Recht (HWR, formerly FHVR) is a Berlin state university, which was established in 1973. The university has proven experience in working in international contexts, among others acting as coordinating institution for several research activities into VET issues at European level.

A major focus of its activities has been on the evaluation of education and training programmes supported by European programmes, in particular by the European Social Fund. In recent years the university has become a centre of excellence for subjects related to quality and quality assurance in training and education.

The university animated Cedefop's Virtual Community on Quality and Quality Assurance and carried out a number of studies into VET-quality subjects in Europe.

Partner 7:

Instituto de Formação Bancária (IFB) was established (in 1980) and is owned by Associação Portuguesa de Bancos (APB – The Portuguese Bank Association). IFB is the body of APB responsible for professional training. Its mission is to strengthen the culture of the banking profession and foster the development of the Portuguese Financial Services sector by qualifying its human resources.

Today, IFB is a solid feature in the field of specialised introductory, intermediate and higher training in Portugal. The Portuguese Bank Training Institute (IFB), together with its The Portuguese School of Bank Management (ISGB), was created and is owned by the Portuguese Bank Association (APB) and is responsible for training and specialised higher education. Its mission is to strengthen the culture of the banking profession and foster the development of the Portuguese financial sector by improving the qualifications of its human resources.

The Institute's objectives consist in satisfying the need for vocational training and development of the member banks' employees is the IFB's main objective. Its services are also available to other sectors and to private individuals.

The IFB has begun to extend its banking and financial training to other entities both in Portugal and abroad.

Official Quality Certification: IFB is officially certified by IQF – Instituto para a Qualidade na Formação (Institute for Training and Quality Certification), a state owned body for quality certification of training institutions.

The referred accreditation includes the following fields:

- Training engineering planning or training activities
- Design of training programmes and instruments and training supports (with a specific validation in distance learning)
- Organization and promotion of training activities (with a specific validation in distance learning)

5. Plans for the Future

The second year aims at developing the European Qualification Prototype (WP4). Starting from the Competence map (WP3), the project will design a qualification Metamodel which is formed by a fully developed qualification for the specific banking sector (rational, knowledge and skills required, indicators of competence performance, outline assessment requirement) and a set of guidelines which present not only the methodological approach adopted but, and even more important, will contain the first elements of communality and difference within sectors which will allow the European Qualification Model to be adopted in different learning territories (tertiary education, Virtual professional networks, initial and continuous training).

The prototype will be composed by two main parts:

- a) Competence prototype of a qualification –containing the list of competence, examples, indicators of competence performance, assessment requirement;
- b) Methodological guidelines in order to foster and enhance the adoption and usability of the European Qualification Prototype at European level.

The Methodological Guidelines will present the key methodological approach to be used in QUADULTRAINERS, the first inputs/ elements for the transferability of the model in all the learning territories.

In order to guarantee a validation control of the European Qualification Prototype and it's methodological application proposed by QUADULTRAINERS it will be necessary to develop a piloting activity. The piloting activity will take place in different pilot sites.

This workpackage aims to:

- Validate the qualifications prototype and its methodological application.
- Collect feedback from piloting institutes in order to verify the consistency and effectiveness of the prototype.
- Collect feedback from involved employees/trainees (at least 50 in 5 EU countries: Italy, Belgium, Germany, Nederland e Portugal) so to verify the consistency and effectiveness of the system.
- Validate the qualifications prototype with representatives stakeholders at European level so to assess its applicability in different contexts and to make sure that it is coherent with the EU policy directions.
- Integrate the results of the piloting phase into the matching of the proposed qualification towards the European Qualification System.

Validation and Testing Report

The document is composed by five main parts:

1. Introduction, where the aim and the structure of the document is described.
2. Outline of the validation protocol, where the overview of the approach is given.
3. Object of validation, where the objects of the different validation exercises are described.
4. Methods and tools, where the methods and the tools to be used for validation exercises are described.
5. Results of the piloting activities.

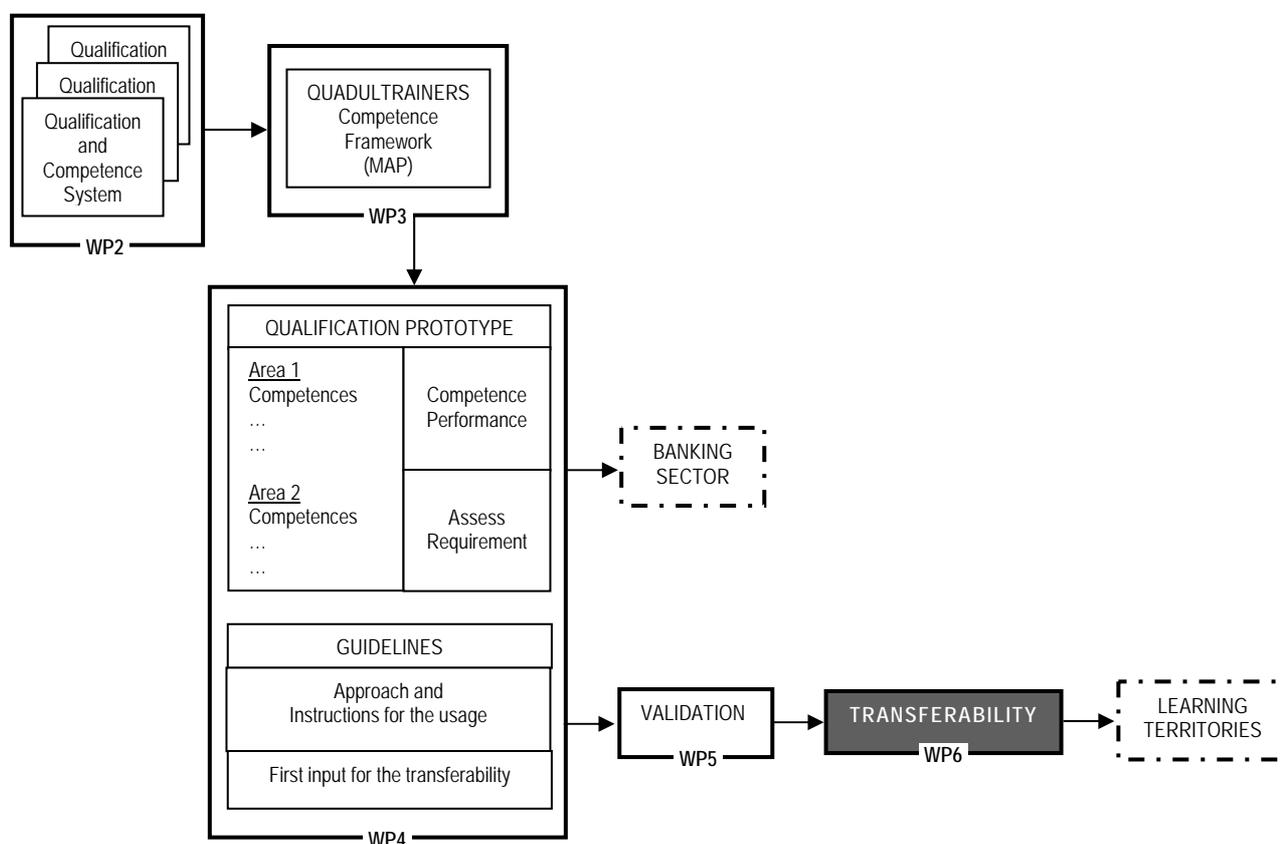
Exploitation

National Level: It is foreseen the diffusion, application and experimentation of the “European Qualification Prototype” and its relatively “Methodological Guidelines”, as well as other information and tools available (also throughout the Web Site of the project). The Exploitation process will take place across different and qualified target groups members of diverse economic sectors (private companies, public administration, non-profit organisations) and professional fields (University, Corporate universities, Business Schools, Training centres, staff selection and orientation agencies, professional re-qualification, etc.).

The aim of the national dimension of exploitation is to promote the highest level of transferability and adaptation of the competences model proposed for the different organisational and productive contexts, for the professional roles of the adult trainers (both internal in the organisations and freelance) taking into account the differentiation through “general competences” and “sectorial” or “Specialised” competences (depending on the role).

International Level: Thanks to AIF’s role and membership on the European Network ETDF (European Federation of Training and Development) QUADULTRAINERS will facilitate the dissemination, application and experimentation of the “European Qualification Prototype”, and its related tools for its application, through all the European training and development associations members of ETDF (which includes 12 association representative from 10 European countries and around 15.000 professionals) and also through institutions, associative nets of existing sectors at European Level and/or International.

Furthermore, QUADULTRAINERS will search and activate synergies among homologue institutional centres and individuals with relevant roles.



6. Contribution to EU policies

Leonardo da Vinci projects enable VET organisations to work with European partners, exchange best practices, increasing the expertise of their staff and respond to the teaching and learning needs of people. It therefore supports efforts to make vocational education more attractive to young people.

Innovation projects have always been at the core of the Leonardo da Vinci programme. They aim to improve the quality of training systems through the development and transfer of innovative policies, contents, methods and procedures within vocational education and training.

European Union projects identify four long term strategic objectives:

1. Making lifelong learning and mobility a reality;
2. Improving the quality and efficiency of education and training;
3. Promoting equity, social cohesion and active citizenship;
4. Enhancing creativity and innovation, including entrepreneurship, at all levels of education and training.

The Quadultrainers project hopes to contribute to several of these key policies.

For instance, with the implementation of the European Qualification Prototype we mean to add to the mobility of educational staff. The recognition of the two Competence frameworks and certification of staff offers them the possibility to assume jobs throughout Europe.

The implementation of the European Qualification Prototype also provides input to all partners and their networks in relation to the quality assurance of trainers and educational staff, it assures organisations a level playing field and through dissemination and exploitation it contributes to the fourth long term strategic objective.