

Handbook for practical use GuideMe! – Quality Measures for Guidance of Job-Seekers in Group Settings

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2. Abstract

The project GuideMe! is an innovation transfer project within the framework of the “Leonardo da Vinci Project”, supported by the European Union.

The aim is to extend the already developed quality guidelines and a curriculum to **improve the quality of guidance measures in the context of the previous project QUINORA** to “new” countries. Thus a foundation for common EU quality criteria in guidance will be created and applied in new partner countries (Turkey, Greece, Bulgaria, Lithuania and Poland).

In response to the internationalisation for guidance of job seekers European quality standards and the European perspective of the predecessor project QUINORA will be further established.

The project QUINORA (2005 – 2007, www.quinora.com) includes a curriculum with seven quality domains and a total number of 22 modules, complemented with 48 best practices applicable throughout Europe.

GuideMe! will be transferred to the new partner countries with further translated materials into the new languages, and 16 additional country-specific best practices.

In each country the curriculum will be discussed within four workshops with **managers of guidance training** activities in training institutions, various **labor and education policy-makers** (eg. employment agencies in EU countries), **engaged in guidance activities**, as well as **trainers of guidance measures**.

3. Introduction and background of the Guide Me! project

Socio-economical trends and the hence resulting rise of unemployment increases the necessity of improving the delivery of vocational guidance, specifically vocational orientation and activation measures in most European countries. However, quality criteria for conducting vocational guidance in group settings are not at all or only rudimentarily developed. Only a limited number of international projects aiming at improving vocational guidance and focusing on the quality of the training of career counsellors have been initiated so far. However, deficits in the quality of vocational orientation measures do not only occur due to missing or lacking training of trainers but also on the system and meta level (planning, managing, conducting). The project **Guide Me!** aims at implementing an **International Quality Assurance Programme**, which has been already developed within the project QUINORA¹ in guidance in group settings.

Guide me! is an Transfer of Innovation project within the framework of the “Leonardo da Vinci” programme supported by the European Commission. The aim is to extend the already developed quality guidelines and the curriculum of **QUINORA** to “new” countries. Thus a foundation for common EU quality criteria in guidance will be created and applied in new partner countries (Turkey, Greece, Bulgaria, Lithuania and Poland). In response to the internationalisation of

¹ QUINORA stands for “Quality International Quality Assurance Programme in Vocational Orientation and Guidance Measures for Job-Seekers on the System Level” (see also www.quinora.com).

guidance of job seekers, the standardization in between the different European countries will be promoted and common European quality standards further developed. Within GuideMe! the results of the QUINORA project will be transferred to the new partner countries with materials, which will be further translated into new languages, and 16 additional country-specific best practices. In each country the curriculum will be tested in four workshops with **managers of guidance training** activities in training institutions, various **labour and education policy-makers** (e.g. employment agencies in EU countries), **engaged in guidance activities**, as well as **trainers of guidance measures**. The **primary target group** of Guide me! is all people involved in the planning, conceptualisation, management and conducting of vocational orientation and activation measures on the system and meta level. On these levels first of all interaction between the initiator of measures (e.g. public employment services) and vocational training managers of training institutions takes place. Second of all there is also interaction between the latter and trainers for vocational guidance.

Within the GuideMe! Project, the experts consortium develops an interactive e-learning tool on the basis of the international quality standards and the synthesis report. This tool is to be used to compensate identified weaknesses of vocational orientation and activation measures. It includes tutorials with concrete instructions, examples and suggestions adapted to the individual needs; It is online available in each of the languages of the partner countries (www.guideme.at / www.quinora.com).

As GuideMe! is based on the already developed QUINORA curriculum, the main aims of QUINORA and the QUINORA curriculum will be described more precisely below.

Background and aims of the QUINORA programme

QUINORA aimed at identifying already existing cases of best practice and experiences in all partner countries and, on the basis of these, at developing a package of international quality standards on system level concerning the management. This package enables the users to evaluate the quality of measures and compensate identified deficits.

As the vocational guidance market is continuously becoming more international, these bodies, which put vocational guidance measures out to tender and which are depending on the country either public employment services or social partners, increasingly call for tenders on an international level. Additionally trainings institutions from all over Europe answer these calls for tender and are ready to transnationally conduct measures.

QUINORA offers a quality assurance programme standardised for all the EU countries. It is essential that throughout the EU all countries are guaranteed to have the same level of quality in vocational guidance measures. Beyond that, QUINORA programme tries to provide a stronger, more reliable and more credible basis for quality assurance methods than those that currently exist. To meet these requirements, the new standards and methods are developed on the basis of best practices examples identified in the respective countries.

The QUINORA curriculum

Each domain, each consisting of a "theory part" and an "exercise part", deals with a certain topic of Quality Assurance in Vocational Orientation and Guidance Measures in group settings.

The guidelines, instruments and quality criteria described in the different domains show several ways in which training institutions can get support on how to take advantage of their potentials and on how to reach the goal of best practice as well as high quality assurance.

1. Domain: Demand and Need Analysis
2. Domain: Call for Tender and Training Design
3. Domain: Staff Policy & Trainer Competences
4. Domain: Materials & Infrastructure
5. Domain: Quality Assurance Measures on the System Level
6. Domain: Quality in the Course
7. Domain: Feedback & Evaluation

4. Guidelines

Based on this analysis of the current situation, international quality guidelines for vocational orientation and activation trainings that are specifically focussing on the management and system level of the labour market actors have been developed in the course of two QUINORA project meetings. In the following the essential aspects of the identified quality domains that will be worked on intensively by Guide Me! will be described:

Quality domain 1: Analysis of Demand and Needs

The demand and needs analysis form the basis for the conception and realisation of vocational orientation and activation measures. Demand analyses are based on a comprehensive monitoring of current and continuous changes on the labour market. Local, regional, and global developments, dependencies and cross-interactions have to be included in the monitoring. It can be assumed that only a goal-focussed examination of the labour market conditions can result in qualitative well conceptualised measures. Only an integration of current labour market conditions will make the establishment of ethically sound measures for participants possible.

Additionally to the labour market demand and the conditions of the labour market, the - often heterogeneous – needs of the participants have to be integrated into a measure's conception. The diversity of participants has to be identified in time and the deducted needs and interests have to be integrated accordingly into conception. The definition of content, goals and target group is a result of demand and needs analyses. As a general rule the superordinate measure goal will serve as a guiding principle. The main focus usually lies on the integration of the participants into the labour market and on providing further qualification in order to prevent long-term unemployment. Next to a variety of specific subjects, basic content should be included in any case. Moreover, the teaching of career- and life-management-skills should be included.

Quality domain 2: Tendering Guidelines and Training Design

Following the relevant laws and regulations of public tendering public contracting bodies define detailed and mandatory quality criteria. Guidelines for tenders create a basis for the content wise presentation of measures.

Guidelines for tenders are a mandatory basis for the structured evaluation of presented concepts and for the awarding of contracts. Clearly structured tendering criteria also constitute the basis for monitoring and final evaluation of measures. Insofar tendering criteria have a steering

function for the whole measure process. The development of criteria and guidelines for planning, realisation and evaluation of training measures is a quality assuring process in vocational orientation and activation measures. To evaluate the implementation of the formulated criteria – implemented in a specific training design – in the presented offers, contracting parties have to assure that there is a universal understanding of quality and goals in the conception- and planning team, the executing party (trainers) as well as in the evaluating commission.

Quality domain 3: Personnel Policy, Quality and Qualification Required of Trainers

This quality domain focuses on one of the most essential aspects of labour market measures. The quality of training measures depends a lot on qualifications and competences of trainers. Trainers' qualifications are defined by formal education as well as informally acquired competences. It is the task of training institutions to systematically define and continuously develop personnel related quality standards and criteria. That's a difficult task: There is no definitive standardized formation for trainers in vocational orientation and activation fields. Trainers dispose over heterogeneous formal educational backgrounds, are usually employed part-time, with different employment contracts and frequently also with more than one training institution.

Employments are discontinuous, payment is little in relation to effort and the amount of work including preparation and post-processing is hardly ever paid for. Continuous and expert further education is not offered institutionally. Identification with the goals and expectations of training institutions and commissioning agencies is hard to establish. In their staff policy training institutions also have to account for sufficient administrative and commercial personnel. Administrative and organisational issues should not be placed in the responsibility of the trainers. Already during conception and planning, training institutions have to provide a conclusive personnel concept. It is therefore the responsibility of commissioning agencies to check on the personnel situation – according to the measure's description – and if necessary formulate in time clear requirements (e.g. regarding qualifications and competences).

Quality domain 4: Course Materials and Infrastructure

Course materials have to be matched with course goals and the target group. Something that is regarded as self-evident but often poses difficult challenges: Participants of measures are often very heterogeneous concerning their educational and professional background. For the compilation of course materials all necessary information regarding goals and target group of the measure has to be given. It is essential to know about the level of language command (including literacy, reading skills and others) before preparing intricate texts. Language should be clear and free of expert or foreign termini and stereotypes.

While in "free adult education" participants (= paying customers) often decide about their enrolment on the basis of the available infrastructure and services, participants of labour market related courses are usually deprived of this information. Participation is more or less compulsory and linked to the receipt of financial subsidies.

As infrastructure can have an impact on the participants' motivation and also to their learning orientation, it should be given sufficient attention.

In any case the training institution has to be able to provide the infrastructure according to current health and safety standards and regulations. Concerning technical equipment (e.g. ICT)

it should be warranted that equipment is fulfilling current standards and exigencies. It has to be guaranteed that trainers are up-to-date with developments as well. It has to be made sure that participants are prepared for integration into the regular labour market by the provision of all necessary up-to-date learning-settings.

Quality domain 5: Quality Assurance on System Level

Quality assurance is a challenge that concerns a whole institution and is reflected in every part of it. At the system level training institutions have (or should have) quality management (QM) and quality assurance (QA) systems. Normally these are certifications from the norms ISO, EQFM, TQM² or quality models that were developed specifically for the field of further education as CERTQUA, LQW, eduQua or similar. The sole existence of such QM-systems is not a guarantee that the realised measures are of high quality. QM-systems are often implemented with high effort and costs but do not by themselves create an institution-wide perception of quality nor guarantee an increase in measure quality. Institutions frequently dispose of own libraries of QM-process documentation but in many cases these documents don't receive (sufficient) further attention and are not lived in everyday work. Implemented QM-systems should be able to communicate an institution-wide understanding of quality which means involving all people taking part in the process. It should be clear for everybody involved what the institution's concept of quality is, what criteria are relevant in the realisation of this common understanding, what processes have been defined to realise it and how that understanding is being continuously developed.

QM and QA systems imply two aspects: On the one hand it's about controlling the institutions quality and on the other hand it's about further development of quality. QM and QA-systems need to become an integral part of institutions' strategies. The same basic understanding of quality by all persons involved has to be assured during all relevant phases of the process.

Quality domain 6: Quality Assurance during the Course

To sum it up, quality of a measure is defined by the conception of the right measure for the right target group under provision of the adequate and right resources and infrastructure as well as the knowledge transfer of the right content by qualified and competent personnel. Both the commissioner and the contractor are responsible for that. Both parties have to bear equal responsibility that quality – that is usually defined by conception and exigencies – can be realised. E.g. the assigning actor has to dispose over all relevant information about the course to adequately prepare future participants. The contractor on the other side has to provide trainers with all the relevant (background) information and give them the possibility to inquire more detailed information if necessary.

Quality domain 7: Feedback and Evaluation

Criteria and connecting factor for evaluation and feedback are more or less fixed in the process of the quality cycle (planning – realisation – analysis and reflection of the measure). It is the responsibility of training institutions to provide clear regulations on feedback-systems for trainers and participants. Feedback and reflection of done work respectively participation in a measure have to be institutionalised.

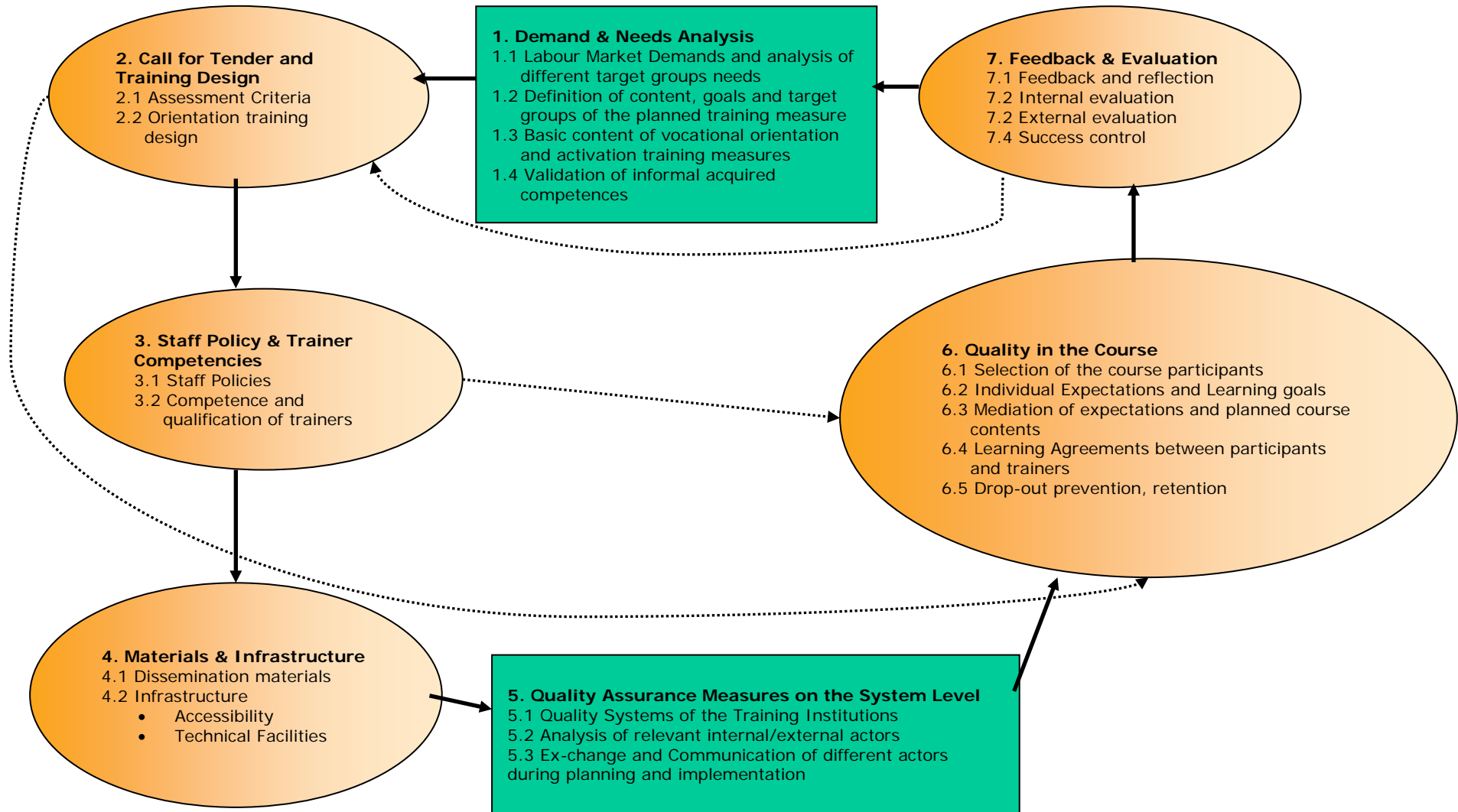
² TQM (Total Quality Management) was originally developed in the USA in the 1940ies and aims to establish quality and quality control as the principal system objective of an organization/ company.

Moreover every training institution should have its services continuously evaluated internally and externally. Internal evaluation has the goal to portray strengths and weaknesses of a measure in a report that can later on be used as a basis for external evaluation. External evaluations are conducted by external experts. The goal of an external evaluation is to identify strategies for quality improvement in the concerned area with the aid of experts. As a rule external evaluation is planning for the realisation of suggestions for improvement and general feedback in the course of follow-up action. External experts should be free in their competences and free to act as they deem necessary. Insofar the selection and deployment of these experts is a crucial process. Experts should dispose of various competences (e.g. knowledge of evaluation and basic scientific research, labour market related know-how and training competences). On the basis of their expertise and the evaluation outcomes recommendations can be given and decisions made.

Further Progression of the Project

Based on these formulated quality domains an e-learning-tool was developed within QUINORA. The tool contains a collection of best practices and helps organisations implementing the quality standards step-by-step. It also gives insight into the practical quality development processes of the participating countries of QUINORA. The e-library provides additional information about quality in vocational orientation. Both the e-learning tool and the e-library were tested within several workshops for labour market actors, team leaders, or training managers of the training institutions themselves (which were also evaluated). The four workshops permitted the exchange of experiences and discussion. During the evaluation, numerous workshop participants and stake-holders gave positive feedback. Therefore, the QUINORA curriculum should be transferred to other regions and countries what is now the main goal of Guide me. Guide me! will also set the basis for a common EU quality criteria system in guidance in group settings by directly addressing the level of guidance practitioners and involving their experience.

The partners will first present some new best practices developed in their country which become part of the new e-library, together with ten old best practices which are all translated into the new partners' languages (available on the project's website www.guideme.at and on a CD-ROM which will be produced). The exercise and theory modules developed within QUINORA will also be available on the website. Through four 2-day workshops taking place in different regions in every partner country, the new materials will be discussed and valorised among the target group (managers of guidance and training institutions, various labor and education policy-makers like employment agencies as well as trainers of guidance measures). Finally, the valorization and dissemination activities as well as the cooperation between the project partners will be evaluated.



5. Curriculum

5.1. Domain 1: Demand and Needs Analysis

5.1.1. Exploration of labour market demands and analysis of different target group

1.1.1.1 Theory Content

Training measures should be planned according to an existing need. Therefore the analysis of a training need should be tracked with regard to:³

- **local and national labour market needs**
- **special target groups** (or/and)
- **a need identified within an industrial sector or certain companies.**

The results of the need analysis (exploration of labour market needs as well as of the target group needs) should be used to develop courses providing access to different or new occupational fields for people.

Who carries out the analysis of training needs?

The analysis of training needs should be carried out both by the politically entrusted employment market related bodies (like *Public Employment Service (PES)*⁴)⁵ and *vocational training providers*⁶.

- The Public Employment Service is often the primary public labour market institution responsible for implementing labour market policy through public services. It is its task to observe regional or sectorial labour market data and research studies regularly. Information (on economical, technological, legal etc. trends and challenges) is mostly gathered via contacts to the Public Employment Service's environment (e.g. trade unions, employers, companies, public administration, networks, Public Employment Service's target groups, professional organisations etc.).
- The training institutions also conduct demand analysis. Generally, competition between training providers is very high. In order to develop a high reputable standing, the training institution should base its training offers on the institution's strengths. In addition it is important that the analysis of training needs is linked to the institution's mission statement and overall goals. The training institution should constantly monitor regional and labour market data and the evaluation of previous courses. Surveys and

³ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p.20.

⁴ It should not, however, be viewed as a provider of defined functions, in particular the labour exchange function, but as a flexible instrument of national economic and social development.

⁵ Also regional/local job centres can conduct demand analysis.

⁶ Some of the vocational training providers outsource demand analysis.

other data collected should be evaluated in respect to labour market risks and opportunities for people.⁷

The analysis

1. Exploration of labour market needs:

The exploration of labour market needs is an analysis of the current situation in the regional and national labour market. This can only be ensured by constant comprehensive monitoring. Emphasis should be made on the analysis of the *regional* labour market demands, since studies indicated that most of the participants/employees show a low willingness to move.

Labour market demand analysis should cover quantitative and qualitative descriptions and analyses of the relevant enterprises industries/cluster/sectors, which are in the regional/local surrounding of the planned measure and likely to absorb employees.

“Forecasting of the labour market is inevitable. The only real question is how this should be done.”⁸

What are **common methods** for labour market demand analysis?⁹

- macro-economic foresight-studies and prognoses: to forecast supply and demand on the labour market
- inquiries of enterprises: to forecast qualifications demand in different branches
- inquiries of employees and workers: analysis of qualification demands according to employees and workers
- Delphi-methods: to identify future trends (appraisalment on the part of experts)
- development of scenarios: to develop options for action
- analysis of job-vacancies
- evaluation of previous training
- systematic contact with the institution's former participants, companies, trade unions, public administrations etc.

It is recommended that two or three of the methods, mentioned above, are combined, in order to achieve best results.

Possible guiding Questions:

- Can a structural change be identified?

⁷ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p.20.

⁸ See: Markowitsch, Jörg / Plaimauer, Claudia / Humpl, Stefan / Lassnigg, Lorenz (2005): Forschungsgestützte Ansätze der Antizipation: Qualifikationsbedarfsanalysen in Österreich, in: Lassnigg, Lorenz / Markowitsch, Jörg (Hg.) (2005): Qualität durch Vorausschau. Antizipationsmechanismen und Qualitätssicherung in der österreichischen Berufsbildung, Innsbruck-Wien, Studienverlag, p. 92.

⁹ See: Markowitsch, Jörg / Plaimauer, Claudia / Humpl, Stefan / Lassnigg, Lorenz (2005): Forschungsgestützte Ansätze der Antizipation: Qualifikationsbedarfsanalysen in Österreich, in: Lassnigg, Lorenz / Markowitsch, Jörg (Hg.) (2005): Qualität durch Vorausschau. Antizipationsmechanismen und Qualitätssicherung in der österreichischen Berufsbildung, Innsbruck-Wien, Studienverlag, p. 80.

- Is there a necessity for acquiring "new competencies and qualifications"?

Analysis: Continuous quantitative and qualitative analysis of employment structure and quotas in the relevant regional/local surrounding and beyond that an adequate analysis of the educational level of the employed population in the specific surroundings.

Possible guiding Questions:

- How is the regional/local employment structure configured?
- How can the local/regional employment situation be described (Employment status, fluctuation of employees, age and gender distribution, employed persons with a migration background, formal qualification level...)?
- What are the employment possibilities for women/men, immigrants, university graduates/people with compulsory school attendance level, etc?
- Are there employment possibilities specifically suited to different levels of education and formal qualifications?
- What are the recruiting procedures (e.g. interview procedures) in the regional/local surroundings, in specific enterprises/industries/sectors (formal application processes, informal vs. formal sources...)?

Analysis: Apart from general qualitative analyses of employment possibilities in the regional/local surroundings a demand analysis should also include interviews with representatives of enterprises, potential employers (human resource managers, managing directors,...)

Possible guiding Questions:

- Which formal qualifications and competences are required?
- Are there any special requirements?
- Are there any qualification/competence "bottlenecks"?
- How could an "optimal" employee be described?
- What are the special situations/conditions of enterprises?
- Are alternative - flexible - work time models possible?
- Are further (in-house) trainings or general training course measures available?

Final statement or conclusion of the demand analysis: How can general development trends in the labour market be described and is it possible for training measures be derived from this within the range of vocational orientation/counselling and employment activation programs?

2. Analysis of the target groups:

Next to the continuous monitoring of the labour market an analysis of the different **needs of people** within the target groups has to be carried out.

Different groups of participants have to be identified, in order to be able to identify and reach the defined target groups through specific measures. It is to be assumed that people who are trying to re-enter the labour market after a waiting period confront different requirements and demands e.g. young people with a generally difficult situation in life preparing to integrate with the help of various training measures. Also the requirements of long-term unemployed people might be different from that of people who have been unemployed only for a relatively short time period. Furthermore, there is a difference between people who are in general vocational guidance programs and people who are qualifying and preparing for their first entry into the labour market. There is also a difference in the requirements of older people, people with a migration background, people with learning disabilities and people who lack education, etc.

Possible guiding Questions:

- Who will attend the course and what special needs do the participants have?

The following aspect should be included in the exploration of the target group:¹⁰

- formal entry qualifications
- previous work and life experiences
- profile/personality of applicants (together with the job they aspire to and the qualifications/competences needed for it)
- entitlement for funding (for the individual participant and/or the training institution)

The need and demand analysis is the basis for determining and developing of training measures. It is the precondition, in order to make the matching process between target groups and labour market successful. Fundamentally it has to be assumed that,

*“In a rapidly changing labour market, guidance and employment counselling have the following crucial roles to play: They can help individuals develop the skills and abilities of self-assessment, information seeking and decision making needed to cope with the complexity of the world of work and to be a real player in lifelong learning; and they provide policy makers and practitioners with the tools to fill job vacancies and training places more effectively in a context of active labour market policy”.*¹¹

The constant monitoring of the condition and changes of the labour market as well as the needs of the participants shall be considered as a basis for action.

Conclusions that lead to the identification of needs are part of the documents that are developed and written for a training measure. The data should also be presented and made available to the participants or other interested parties.¹²

¹⁰ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p.20.

¹¹ See: Watt, Glenys (1998): Supporting Employability. Guides to Good Practice in Employment Counselling and Guidance, Luxembourg, p.1. Available at: <http://www.eurofound.eu.int/pubdocs/1998/34/en/1/ef9834en.pdf>

¹² See: Hausegger, Gertrude / Bohrn, Alexandra (2006): Quality in labour market policy training measures. The work situation of trainers as relevant factor to the quality of the measures? Interim report. Module 3: Learning procurement system – labour market policy services, Wien. Available at: http://www.prospect.at/PDF/IMPROVE_Zwischenbericht_Juni06.pdf

1.1.1.2 Exercises

Individual exercises:

1. Did your training institution identify the needs by itself? If so, how did the institution do this?
2. If the training institution did not identify the needs by itself, who conducted the demand analyses? Did the institution do any additional research?

Group exercises:

1. Define three common methods of the labour market demand analysis. Discuss advantages and disadvantages of these methods.
2. Imagine yourself a manager of a training institution. Make up a short proposal about how to explore the labour market needs (by which methods) as well as the needs of the target groups. Within which time period should the analysis take place and who should conduct it? How would you proceed? What are the consequences of the results?
3. Discuss the best practices of this module and try to find out with what you agree and disagree.

5.1.2. Definition of goals, target groups and content of the planned training measure

5.1.2.1. Theory Content

A prerequisite for the preparation of a vocational training measure is the definition of goals, content and target groups.

1. Goals

The goals of the training measures should be in line with the mission statement and values of the training institution. According to Foster and Gutschow¹³ goals-definition should embrace the following points:

- The institution has to describe skills and competences which ought to be reached during the course.
- The institution decides on the kind of certification the participants will receive.
- Information on all aspects of the course is made accessible to participants, the labour market office, companies etc.

The clear definition of goals for a vocational training is not a sufficient condition to ensure quality, but they are crucial to make a training efficient (see 1.1.). Without the existence of goals it is difficult to speak of quality or to apply elementary quality management principles such as "quality assurance" (= making sure that standards are available = making sure that standards are always met), and "quality improvement" (= raising the standards, or increasing the numbers that achieve the goals). With accurately defined goals and sub-goals adoption of any type of quality approach (e.g. self assessment) is made considerably easier.

¹³ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p.21

In almost every Member State the approaches for the vocational training are quite different. In centralised systems goals are often set by the Ministry of Education or some other body at a similar level of authority. These goals can be very precise and specific and therefore useful for vocational training providers, or they can be very broadly defined (as in the majority of the cases). However, precise sub-goals and objectives of training measures should be embedded in overall goals predetermined by the European Union. The European Union has defined the following overall aim of training provision:

*"In the context of life-long learning, guidance refers to a range of activities that enables citizens of any age and at any point in their lives to identify their capacities, competences and interests, to make educational, training and occupational decisions and to manage their individual life paths in learning, work and other settings in which these capacities and competences are learned and/or used."*¹⁴

Accordingly, vocational guidance has to be accessible in time and ways that will encourage the citizens to continue developing their skills and competences throughout life according to the changing needs of the labour market. Vocational guidance has to be treated as an active instrument for supporting the individual development, and people have to be positively encouraged to make use of it.

In addition the overall goal of the national Public Employment Service (PES) should be considered. The Public Employment Service of Vienna says for instance:

*"Integration of (...) a mentioned target group into the labour market; this has to be carried out by a customised treatment tailored to target-group-specific and individual problem constellations (whereby the focus should lie on already existing strengths and abilities of the participants), above all by an intensive and coached work on application and mediation support as well as the demonstration of individually viable solutions."*¹⁵

The vocational training providers need some kind of implementation mechanisms, which translate broad political goals into goals that can be used for action.¹⁶ Goals must be "operational", in order to become measurable.¹⁷

Developing Measurable Objectives (Indicators)

Measurable objectives are used as assessment tools. Once the objective is defined, this then becomes the foundation for the grading or assessment policy.

What are the guidelines for writing measurable objectives? The objectives should be written according to the following template (e.g. objectives concerning the results):

The skill that the trainee demonstrates.	Conditions under which the trainee demonstrates the skill.	Criteria for measuring success.
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¹⁴ See: Resolution of the Council of the European Union on Strengthening Policies, Systems and Practices in the Field of Guidance throughout life in Europe (28 May 2004), Brüssel. Available at: http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/educ/80643.pdf [20.06.2011]

¹⁵ See: Public Employment Service Vienna (2005)/ Dep. 7: Course description „JOBEXPRESS“ for the regional department Geiselbergstraße, p.4.

¹⁶ See: <http://www.eduqua.ch> [20.06.2011]

¹⁷ See: Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Education and Training, Interim Report of the European Forum, p. 15. Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [20.06.2011]

By clarifying expectations - how many, to what degree, under what conditions, etc., - both the tutors and participants are clear about what is expected.

- Possible measurable “strong” objectives and sub-objectives:

- Placement rate
- Drop-out rates
- Number of participants with advanced qualifications
- Number of participants, who don't focus on occupations based on traditional, old-fashioned gender roles (gender mainstreaming)
- Individual circumstances of the adolescent
- Number of participants who are better informed
 - about the current supposition and requirement of the labour market (to realise selective, specific classification of occupational skills)
 - about current employment opportunities
 - about the current labour market (In which areas are employees needed?)

- Possible measurable “soft” objectives and sub-objectives:

- Number of participants with improved self-perception
 - How do the participants perceive themselves? How do they describe their skills and capabilities? (Comparison between before and after)
- Number of participants with increased self-esteem
 - to be able to express ones' feelings
 - to communicate about personal emotions
 - to speak out with in a group
 - to express one's opinion and defend it
 - to be aware of one's future (What is my goal?)
 - to be aware of one's strengths and weaknesses, and to have the ability to communicate about them
- Number of participants with increased decision-making ability and responsibility
 - how do the participants implement the proposed solutions which have been developed during the measure?
- Number of participant with increased motivation

- continued involvement in the activity of the measures even though the participants may not be aware of the progress they have made through the measures
- active cooperation during the measures
- persisting in measures although they are sometimes exhausting, time-consuming and extensive.
- persisting during job application.
- persisting although the reintegration to the labour market is not successful immediately.
- Number of participants with increased personal responsibility
 - to work on ones' aspirations beyond the activities of the measures (to accept responsibility for the own future)
 - to ask questions if anything is ambiguous
 - to work on ones' own weaknesses
 - to devise ones' own plans of the future. How do the adolescents implement their plans? (To be able to help oneself)
- Number of participants with increased reflectivity
 - to identify situations, where intentions and actions are not congruent.
 - to be able to differentiate between self-perception and the perception of others (How do other people perceive me? How do I perceive myself?)
 - to reach an understanding about one's life (Where am I from? Where am I now? What is my aim?)
- Number of participants with increased empathy
 - to understand oneself and others in a better way
 - to have better relationship with others
 - to describe emotions to others, even though they are not verbal
 - to have the ability to see oneself from the perspective of others
- Number of participants with increased authenticity
 - to respect oneself and others
 - to be honest in conversation with others
 - to be honest with oneself
 - to realise ones' capabilities and communicate them in the right way

- Number of participants with increased orientation to aims
 - to have a precise idea of ones future with regard to work
 - to aim for realistic jobs
 - to be knowledgeable about possibilities of how to get this job

One of the main problems training institutions experience when identifying training goals is that the issue of goals is fairly complicated:

- It is not always clear for which areas goals could and should be defined.
- It is sometimes very difficult (time consuming, expensive) to define goals.
- Different stakeholders may want different (possibly conflicting) goals/standards.
- Standards may have to be adapted constantly, because of rapid changes in the context.
- There may be disagreement about who develops the goals.
- etc.

2. Target groups

Another aspect which needs to be defined when planning the measure is the target groups. The definition of the target groups is one of the most important processes in the planning phase. A precise definition of the target groups for each training measure is the basis for the development of the course curriculum (selection of training material, designing the “right” methods and media, development of the contents etc., see: [6.3.](#)).¹⁸ A measure which does not embody the different and individual needs and expectations of its diverse target groups is not very likely successful.¹⁹ Thus the examination of the target groups plays a very crucial role.

First step: A precise examination of the target group is recommended. Which type of target groups will participate in the measure? With this in mind a number of questions emerge:

- What is the educational background of the participant?
- What kind of work experiences has the participant already gained?
- Which languages does the participant speak (fluent – limited?)?
- What kind of technical competences does the participant have (e.g. IT competences)?
- What level of physical capabilities and mental abilities does the participant have?

Possible: What is the life situation of the participant? For instance: Does a single mother have the necessary care network to participate regularly in a measure or not? Does the participant have debts?... etc.

¹⁸ See further information later on.

¹⁹ See: Balli, Christel / Krekel, Elisabeth M. (2004): Qualitätsentwicklung in der Weiterbildung – Wo steht die Praxis?, Bonn, wbv Verlag.

Second step: It is also necessary to check the expectations of the participants, since meeting the expectations in the measure is one of the preconditions for succeeding in vocational training. Possible questions for checking the participant's expectations could be:

- What does the participant expect from the measure?
- Are there any formal qualifications and competences the measure should build on or which the measure should support (e.g. reading, writing or mathematical skills)?
- What kind of focus should the measure have? (e.g. acquisition of technical competences, acquisition of language competences, acquisition of social competences/skills)
- What results does the participant expect from the measure?

Outlining these different groups of people as well as their needs and expectations leads to target-group-specific settings, tasks and topics within the training measures.

3. Content

These differences in needs and expectations have to be considered during the development of the **content** of the measure. What do course participants need and expect? Each course should be based on these specifications. If gaps in the course content are identified during the course of the labour market demand analysis or in the course of the analysis of the target groups' needs, moves should be made to close the gaps.

Measures usually are related to (further information, see [1.3.](#)):

- vocational orientation
- educational and vocational choices
- soft skills
- health and soft skills promotion
- life- and career management
- job finding.

In practice the appropriate action framework must be devised for each individual problem and need. Especially if in the delivery encourages a diverse group structure²⁰. Measure planning should, overall, focus on **an individual working approach** with the participants.

²⁰ As an argument for heterogeneous groups within the scope of training measures one hears quite often that in the "real" labour market nobody can choose whom to work with. While this argument has to be agreed upon to some extent one has also to admit that economic reasons are also important for a "heterogeneous group building" in scope of active labour market policy. On the one hand the courses have to be "filled" sufficiently in order to become cheaper, on the other hand the counsellors in the Public Employment Services do not have "unlimited" budgets in order to meet the individual needs of their clients. Moreover, it has to be pointed out that non-voluntary participants influence the success/failure of a course.

1.1.1.3 Exercises

Individual exercises:

1. Name some “strong” and “soft” objectives. Find at least two measurable sub-objectives (indicators) to each objective.
2. Which group was the target group of the last training you attended or held? How did “your” training institution determine the target group?
3. Who was involved in determining the target group? Who should be involved in determining the target group?
4. What are the guidelines for establishment of measurable objectives?

Group exercises:

1. Discuss why identification of the training goals is could be a fairly complicated process. Argument your point of view.
2. Discuss why a precise examination of the target group is needed. What consequences can have the measure if the needs of the target group are not considered appropriately?
3. To what extent does the definition of the target group have an influence on making decision with regard to scheduling, content and didactic approach?

5.1.3. Basic content of vocational orientation and activation training measures

5.1.3.1. Theory Content

In many countries nowadays, vocational training systems are under great pressure to succeed: course participants expect guaranteed placement in the labour market and career success; companies need skilled and efficient people who do their job well; society expects high potential, competitiveness, employment and prosperity; and politicians expect support in dealing with economic and social issues. Vocational training is expected to be dependable and extensive, flexible and dynamic, geared towards the job market and towards fostering personal skills.²¹

Facing such great (and sometimes contrary) expectations, those people who are responsible for the development and implementation of vocational training are well advised to form their own vocational training vision capable of including all of these different demands but that is tempered by realism.²²

²¹ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.8. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf

²² See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.8. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf

What are the necessary steps?

At the beginning when the contents of the training measures are being defined, teams should be assigned to develop the curriculum. The teams need to be composed of experts with a lot of experience such as authorities (e.g. labour ministry, ministry of education), workplace experts or training experts, employer's associations, trade unions and affected social groups such as vocational training providers, NGO or district groups.²³ Those people responsible for the determination of the contents need as much information as possible about the current vocational and labour situation. This should include data on the labour market, information on technical revisions, upcoming structural changes, economical developments or information on operational qualification needs (see 1.1.). In addition the training and further training situation in each sector should be documented. Information on the target group's (e.g. graduates of certain types of school) and demand for vocational training is also very important for planning efficient training measures (see 1.1.).

First step: Determination of core tasks

The content of vocational training is determined on the basis of a few core tasks which a fully trained specialist should be able to fulfill. These core tasks cover the function of a particular training profile. When defining core tasks, the idea is to figure out the tasks without disregarding the specific character of the training profile.

The main question is therefore: *Which core task is characteristic for the qualification profile gained in the training course?*

Even if the question and its answers may seem trivial in the first moment, for future graduates these will be the main point of their vocational identity. A precisely named task lets them see themselves as "skilled" after participating in the training measure and distinguish themselves from other task areas.²⁴

It is immensely important that an open and productive environment for discussion is created (and in the following steps) this ensures that all ideas are accepted by the other team members regardless of whether they can be realised or not.

Second step: Defining hierarchy levels

Main question: *Where should the training be located in the educational system and the labor market hierarchy?*

The training certificate shall be positioned in the education and labor market system, since the certificate must be both formal recognised by educational institutions and authorities and accepted by the labour market. The level of qualification which should be attained through the

²³ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.11. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf

²⁴ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.12. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf

course is also dependent on the target groups the training program is aimed at (see 1.1. and 6.2.).

When establishing hierarchy levels, the team responsible for the determination of the contents of course initially develops ideas about:

- on what is level of operative organisation the trained participant will work in, and
- at what level the formal certificate should be positioned in the education and training system.

If the planned training course serves is not a “dead end” in the nation’s education and training system, the issue of establishing links to existing (further) education and training must also be established. As well as the issue of classification in line with job role.

Third step: Labelling the course

To ensure long-term sustainability of the training diploma it is important to select a definition which is as clear and concise as possible and which avoids confusion with similar certificates.

Main question: *Does the vocational training differ from that of another vocational training provider?*

Fourth step: Networking

At this step the group exposes the ideas, which they had developed to a broader audience by entering an extensive dialogue with institutions, experts, associations, authorities and individuals (such as potential course participants). The purpose of this step is to make sure that the planning is on the “right path” and to discuss it with other “affected” institutions and groups. Comprehensive discussions or talks, workshops or surveys help to make clear to what extent the profile’s design corresponds to actual demands both on the part of potential trainees and on the part of the labour market. This is one of the most important steps when planning a course, since finding out how wide the vocational training accepted is crucial.²⁵

At the **fifth and sixth step** of the approach (see 1.4.) the competence analyses and analysis of underpinning knowledge have to be undertaken before the team can design training modules.²⁶

Usually the modules deal with the following contents:

As basic contents of vocational orientation/job counselling measures the following aspects can be listed:

- Vocational orientation/job counselling measures have to include fundamental aspects of finding a career and life management skills. Tutors must be able, due to their know-how, formal qualifications and professional experience, to convert those aspects into

²⁵ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.12. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf

²⁶ Modules are training units which impart basic concepts or are used to train certain, characteristic work functions.

their work, according to the goals formulated for the measure and derived from the target groups.

- Many participants of vocational training are unemployed. For those people vocational orientation/job counselling measures have therefore to assist with the active acceptance of the participants' life situation burdened by unemployment. The development of necessary coping skills for the handling of their life situations shaped by unemployment is central. In particular the acquisition of new productive coping skills has to be promoted through the exchange of experience in group settings. Tutors should have extensive methodological knowledge in this area; they have to be able to react flexibly and be able to handle situations adequately.
- Vocational orientation/job counselling measures support the acquisition of social skills and formal abilities (e.g. IT skills, job finding skills, CV compiling, presentation of oneself, self responsibility, empowerment, etc) and competences in group and team situations. With the creation of an appropriate learning climate, tutors have to professionally accompany and support the acquisition of these abilities and competences.
- Trainers in vocational orientation/job counselling measures need to raise and constructively discuss the, often dominating, success indicator "placing rate"²⁷ in an productive way. The participants should not to be put under pressure by this "success indicator". In the context of individual care and coaching it is important to identify personal success indicators. It is the duty of the tutors to communicate these compiled individual success indicators in an appropriate way to those assigning places/contraction bodies.
- Vocational orientation/job counselling measures must be aligned to the labour market and the individual job search. Further aspects regarding training and education may also have to be considered. Tutors have to be able to deal with all other possible emerging topics in the training context: Drug/alcohol abuse/addiction, illnesses, debts and so on. These problems can stand in the way of finding a job and therefore it may be appropriate to assist the participants to find adequate counselling and supporting projects, if special social intervention and care are not supplied by the actual training institution. In this case tutors may need additional qualifications and competences along with the other key competences for labour market related topics.

²⁷ According to the course description „Jobexpress 2005“ by the Public Employment Service of Vienna it is successful if 40% of the participants (100%=all participants) get a job within 4 months after the individual ending (see Public Employment Service Vienna (2005) / Dep.7: Course description „JOBEXPRESS“ for the regional department Geiselbergstraße, p. 4. Further success criteria or criteria for defining success are not mentioned within this course description. It is for instance not further defined, which kind of employment the participants should find and what will happen to the participants who do not find a job within this time period. Aside from this general „success criterium“ no other success indicators are mentioned which is according to the target group description too-short time a view. For instance, the success of such a course can also be seen if participants can build personal networks in scope of the course or if different individual problems can be (partly) solved (for instance participation in dept relief programmes) etc.

Final remarks: In contrast to some higher training qualifications, vocational modules are fairly flexible and adaptable to regional or current needs. Constant updating of the learning curricula and contents as well as regular redefinition of the contents is necessary, since it helps to ensure that vocational trainings keep abreast of changes in the labour market (industry and commerce).²⁸

5.1.3.2. Exercises

Individual exercises:

1. What are the necessary steps when defining the contents of a training measure?
Define each step in two or three sentences. Write the answers on a sheet of paper in catchwords.
2. What is the basic content of vocational orientation/job counselling measures?
3. What is the purpose of networking? Name at least two reasons.

Group exercises:

1. Imagine you are the team responsible for the development and implementation of a vocational training measure. Your task is to create a profile of a specific kind of measure. Three fundamental decisions are to be made:
 - Which core task should be characteristic for the measure?
 - Where should the training be located in the educational system and the labour market hierarchy?
 - How is the desired certificate called?
2. Why is a clear and concise labelling of the course so important? Discuss this issue and argument your opinion.
3. The purpose of networking is to make sure that the planning of the measure's content is on the "right path". Think about "your" training institution. Does the institution acknowledge "networking" adequately in your opinion?

5.1.4. Validation of informal acquired skills and didactic analysis

5.1.4.1. Theory Content

Another step, **competence analyses** and **didactic analyses** have to be undertaken, before training modules are designed.

Fifth Step: Competence²⁹ analysis

This stage of the approach bridges the gap between the task and the learning systems. How can course participants be guided systematically to fulfil the previously identified work requirements competently and efficiently? What skills, knowledge and attitudes

²⁸ See: Cedefop – European Centre for the Development of Vocational Training (ed.) (2006): Vocational education and training in Austria, in: Cedefop Panorama Series, 125, Luxembourg, p. 15. Available at: http://www2.trainingvillage.gr/etv/publication/download/panorama/5163_en.pdf [24.05.2011]

²⁹ Competencies are knowledge and skills and specialists' attitudes.

are necessary and how can they be developed systematically?³⁰

In the past two decades the problem of how to translate task system topics into learning system syllabi has been neglected. However, the team responsible for developing and implementing training courses is to be encouraged to translate task requirements into competencies (competence analysis) and analyse the learning steps necessary for the development of competencies (didactic analysis).

Formal versus informal competencies

Formal acquired competencies can be distinguished from informal acquired ones. Formal acquired competencies are approved as qualification through corresponding certificates, degrees, diploma, whereas informal acquired competencies are not. Taking into consideration that "experience is of value"³¹, the focus of competence analyses have mainly to lie mainly on the informal acquired competencies.

A common definition is found in Michel Joras' book "Le bilan de compétences"³². He describes the analysis of competencies as a dynamic process, which provides the opportunity to analyse competencies that are gained outside of formal competencies as well as to identify the ability to develop competencies in career-decision-making.

The analysis

As a first step the competence analysis is needed to make visible all informal qualifications acquired in education, vocation and everyday life on part of the (potential) participants. It is the assessment of a participant's informal competencies. According to Ruedi Winkler³³, chairman of the Swiss association Valida, the implementation of the profile analyses (or competence analyses) should be adapted to the educational level of the target group. The results of competence analysis should provide the following information (What kind of social competences/skills does the participant have? Does the participant possess different competences (e.g. communication skills, presentation skills, conflict management,...)?):

- information about vocational, outside and personal competencies
- information about aptitudes and abilities, potentialities of further personal development and opportunities
- information about motivation and motives
- definition of aims concerning personal career strategies, further education and concrete next steps.

As a second step competence analysis lists the knowledge skills and attitudes necessary for being able to perform a work function in a competent manner (see 1.1. analysis of labour market demands). The question is: Which qualifications and competences are necessary for

³⁰ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.18. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select_and_struct.pdf [20.06.2011]

³¹ www.valida.ch [20.06.2011]

³² See : Joras, Michel (1995): Le bilan de compétences, Paris: Presses Universitaires de France.

³³ See: Winkler, Ruedi (2003): Gelernt ist gelernt - aber nicht immer anerkannt, www.ruediwinkler.ch [20.06.2011]

effective and efficient job implementation. These defined skills need to be compared with the personal soft skills of the participants. Based on this, a syllabus is developed. Didactic analysis works out the right syllabus to fulfil these requirements.³⁴ Which skills should be “developed” by means of the course?

Points to consider

- The awareness of existent competencies provides the participant with enlightening information and leads to an increased self-confidence. This is especially important for participants with low self-confidence due to long-term-unemployment. In this respect, the competence analysis aims at discovering and making individuals aware non-certificated knowledge in order to open up new paths. Identification and awareness may assist in activating an individual to realise their potential. It is self empowering for individuals to gain understanding and control of their situation and to develop a range of strategies for with life stresses³⁵.
- This step does not simply equate the syllabus with the functional requirements. Instead, it needs an individual analysis of the knowledge and attitude components and ideas of how this knowledge can be broadened, deepened and built upon systematically. Informally acquired skills are necessary since:

“Work – according to the basic idea – is more than simply understanding predetermined reaction patterns to certain action stimuli. Work also implies active interpretations of task conditions and options and their reflected implementation.”³⁶

Along side this participants need to learn to manage their work in an informed, efficient and appropriate manner. To be able to interpret, evaluate and process work instructions properly, employees should have a broad range of *action competencies*.³⁷

- *Training task routines*: Training programmes should include experiential learning, or trying out and practicing particular types of tasks. Mastering of occupational tasks requires extensive experience which may only be perfected in the latter course of a career.

- *Specialised knowledge*: In line with traditional training concepts, course participants should learn the facts, terms and rules require for their future line of work. This knowledge serves as

³⁴ The didactic analysis assesses whether the planned training course can impart the collected competences (see: competence analysis). A whole range of competences will turn up on the list which the restricted training period may be able to foster yet will not be able to form systematically. This includes competencies which can be assumed as common knowledge at the beginning of the course, but it also includes general attitudes (for instance, executing tasks punctually) which the course of the training program might foster implicitly, but are not worth picking out systematically as a central theme.

³⁵ Wolf, Bertram (2005):

http://www.abif.at/deutsch/news/events2005/Erfahrung_einen_wert_geben/Tagungsmappe180505.pdf
[20.06.2011]

³⁶ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.18. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf
[20.06.2011]

³⁷ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.19. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf
[20.06.2011]

the basis for a proper technical understanding of job tasks, enables communication among colleagues and forms the basis for further learner-led training and development.

- *Action or task knowledge*: Besides their technical knowledge, employees also need to be able to competently throughout their work e.g. when dealing with products, work materials, procedural regulations and with other people involved.

- *Procedural knowledge*: Employees can only work properly in complex situations and under unclear working conditions if they are fully aware of their working context. For example to what objectives they are working toward, and with the aid of which prerequisites. They need proper knowledge of processes e.g. total work processes (work process knowledge), the company structure, the work process contexts, etc.

- *Knowledge of design*: Today, employees are increasingly confronted with changing production conditions which demand an attitude open to innovation.

Models of competence analyses:

During the last decade many European countries established facilities/institutions to develop and to accredit learning that is acquired outside of formal learning environments. Different procedures, methods and instruments identifying informal acquired competencies currently exist.

- The French model of competence analysis according to Michel Joras³⁸, suggests the following procedure:

Stage	Aims of stage
Stage 1: Introduction and preparation	The needs of the individual are known.
Stage 2: Working out the basic principles/fundamentals:	
Collecting and detecting the basic principles of the vocational and personal motivation and the corresponding interests.	Vocational and personal motivation and corresponding interests are clarified.
Collecting the vocational and outside (informal) competencies.	Vocational and outside competencies are detected and described.
Collecting general knowledge, if necessary.	General knowledge is if necessary collected.
Determination of the vocational development potentialities.	Vocational development potentialities are worked out and recorded.

³⁸ See: Joras, Michel (1995): Le bilan de compétences, Paris: Presses Universitaires de France.

Stage 3: Conclusion and further strategies	<p>The individual took detailed note of the results of stage 2.</p> <p>The decisions of the next vocational steps and the further education are made.</p> <p>The next steps are planned.</p>
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- The German model KOMBI³⁹, a life cycle of competence analysis of the Chair and Institute of Industrial Engineering and Ergonomics, RWTH (Rheinisch-Westfälische Technische Hochschule) Aachen, supports companies in identifying the job specific requirements of a company and the current competencies of employees. KOMBI is implemented in four phases:
 - 1 Analysis of the working/job specific requirements
 - 2 Analysis of existent and potential competencies of the employees
 - 3 Assessment of prior learning and competencies and its current recognition with accreditation bodies
 - 4 Specify measures – either in regard to strategic personnel development or intern/extern personnel recruitment

- A German model of competence analysis⁴⁰ has been developed by the development partnership Gendernet, which places emphasis on the compatibility of vocation and family, and is sponsored by the program EQUAL, founded by the European Union.

- The subproject KOBRA⁴¹ offers at www.gendernet.de/2004/kobra/ the possibility to recognise one's own strengths. Specific exercises, practices and instructions are supposed to support the reflection of previous learning and skills, acquired in vocational, social and familial environment. The combination of tests in the categories "testing potential" and "job profiles" assists self-assessment for further vocational orientation and development. You can find exercises such as intelligence tests, knowledge tests, computer tests and puzzles.

³⁹ <http://www.iaw.rwth-aachen.de/produkte/kombi/index.html> [07.01.2005]

⁴⁰ <http://www.gendernet.de/2004/kobra/> [12.03.2005]

⁴¹ <http://www.kobra-berlin.de> [24.05.2011]

Examples of “best practice” for quality assurance programmes are identified in “Valida” (Swiss) ⁴², “The Competence Portfolio” of “Bildungswerke” (Austria) and the project “CREA” (Italy). Other European countries have also begun to develop their own methods.

For Instance: The Irish project WAVE ⁴³ addresses the need to introduce a “Work Experience Validation Protocol in European Aquaculture”. The WAVE project:

- produces a comprehensive list of aquaculture relevant qualifications, including skills, expertise, knowledge requirements and industrial competencies.
- identifies gaps between current qualifications and competencies and training needs for both structured and informal learning within business.

Risks and weak points of competence analyses:

- The greatest barrier concerning the implementation of competence analyses in companies might be the expenditure of time and costliness of this new practice.
- In addition, ethical problems of data security do emerge because the information gained through competence analysis, which is supposed confidential, is accessible for other people (tutors, training institution, Public Employment Services etc.).
- Equality of opportunity is seldom assured, since disadvantaged people are usually excluded from those instruments due to language and educational barriers. It is therefore necessary to adapt methods according to the target groups (e.g. migrants) is necessary.
- Another criticism that is directed at the methodology of measurement of informal competencies by means of competence analyses. This is that analysis of data is always at the risk of subjectivity. To what extent are the participants or other persons (in case of external evaluations) able to describe themselves in a realistic, adequate and objective manner?
- The expectations of the individuals pose a further risk to competence analyses because within a corporate culture or the labour market appreciation of informal competencies for the most part is not existent.

Sixth step: Didactic analysis

According to InWEnt (Capacity Building International) ⁴⁴ the didactical school of teaching is a highly individual process of linking the known with the unknown, of forming and testing hypotheses, and of generating subjective meanings controlled and initiated by the participants/trainees.

⁴² Winkler, Ruedi (2005):
http://www.abif.at/deutsch/news/events2005/erfahrung_einen_wert_geben/Winkler%202-Teil-Qualitaet.pdf
[24.05.2011]

⁴³ <http://www.aquatt.ie/aquattinitatives/currentinitatives/wave.php>[12.03.2005]

⁴⁴ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.20. Available at:
http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf
[27.05.2011]

When selecting and structuring learning contents, it is necessary to take the following points into consideration:

1. Knowledge has to be relevant in order for the participants/ trainees to learn with a sustained effect.
2. Learning processes should be designed in a manner which links knowledge and structures which can be constructed in a hierarchical manner.

To fulfil both learning process design requirements, the didactic analysis converts the specifications phrased in the competence analysis into structured learning fields.

Seventh Step: Developing a Module Structure⁴⁵

This step involves developing a modular structure of the training program. It is recommended to divide the modules into knowledge modules and task modules which are split in terms of the selection of syllabi as well as the training methods used.

It is important to construct the individual modules after separately summarising the learning areas. The modules are the teaching units which either convey basic knowledge or teach course participants to perform one or more work functions.

5.1.4.2. Exercises

Individual exercises:

1. Employees should have a broad range of action competencies. Name at least four action competencies and explain why they are important to be taught in vocational training measures?
2. What does didactic analysis aim at? Which aspects have to be taken into consideration when selecting and structuring learning contents?
3. Name one or two models of competence analysis. Describe at least one model.
(Recommendation: Read the best practices first.)

Group exercises:

1. Does "your" training institution conduct competence analyses? If so, describe how the institution proceeds.
2. Discuss the risks and disadvantages of the competence analysis. Find possible solutions to eliminate the disadvantages.

⁴⁵ See: InWEnt – Capacity Building International (2005): Selecting and Structuring Vocational Training Contents. Beiträge aus der Praxis der beruflichen Bildung, 12/2005), Mannheim/Germany, p.21. Available at: http://www.inwent.org/imperia/md/content/bereich4-intranet/abteilung4-01/12_select.and_struct.pdf [27.05.2011]

5.2. Domain 2: Call for Tender and Training Design

5.2.1. Assessment Criteria

5.2.1.1. Theory Content

Call for tenders guidelines shall meet several requirements and tasks. The contracting body (in many cases the Public Employment Service (PES)) makes up an *obligatory quality criteria* catalogue taking into consideration the relevant laws and regulations as well as the assignment of public tasks. This checklist enables the contracting body to evaluate submitted tenders of training institutions according to a point rationing system (in the majority of cases⁴⁶). These quality criteria are basically a rough mandatory framework for the tenders. Reference to a developed set of comparable criteria and standards facilitates the comparison and examination of different offers. In addition, the introduction of these criteria aims at making bid more objective and transparent. But according to several studies⁴⁷, due to the simplicity of the scheme the qualitative distinctions of the tenders can be hardly made visible and therefore are not taken into account at the evaluation process.

Current developments in EU-legislation⁴⁸ are concentrated towards standardised e-procurement procedures for the awarding of public service contracts. As these standards are focusing on objectively measurable criteria (e.g. price) this development may lead to the price dumping increase and consequential quality decrease.

Structured calling guidelines fulfil the main "control and support task" beginning from the assignment process and coming over further over the implementation process up to the final ex-post evaluation process following a successfully/ not successfully accomplished training measure.

Calling guidelines have therefore the potential to take over these comprehensive tasks as because in an ideal case they:

*"Create clarity for the formulation of the professional tasks and the instruction for the implementation of a special measure (performance specification), offer an arrangement structure for the content wise statement of capability characteristics on the side of the training institutions (implementation specification), give a systematic basis for the evaluation of the received offers (assessment specification) and constitute a common basis for ex-post evaluation of the measure (available basis for control and evaluation as well as for the training institutions and for the contracting bodies)."*⁴⁹

⁴⁶ In Germany a decision guideline for the qualitative evaluation of pre-occupational training courses was developed by the Public Employment Agency. This guideline is an important instrument in the framework of the planning phase. The guideline being a rational information fundament for all involved parties in the scope of the call for tender and an acceptance template of the bid containing implementation procedures as well is oriented towards the quality categories of input, process and output quality – a total of 15 quality domains. For each course a specific profile can be created. These profiles are the basis for creating the service description and the evaluation of the tenders/bids of the training institutions (see: Steiner, Karin/Weber Maria E. / Zradhal-Urbaneck, Julia (2005): Pädagogisch-didaktische Qualität bei der Aktivierungsmaßnahme 2005, unveröffentlichter Endbericht, Auftraggeber AMS Wien, Wien, p. 28).

⁴⁷ See: Steiner, Karin / Weber Maria E. / Zdrahal-Urbaneck, Julia (2005): Pädagogisch-didaktische Qualität bei der Aktivierungsmaßnahme 2005, unveröffentlichter Endbericht, Auftraggeber AMS Wien, Wien, p. 93.

⁴⁸ E.g. Directive 2004/18/EC of the European Parliament and of the Council, 31 March 2004. For an overview over current developments see http://europa.eu.int/comm/internal_market/publicprocurement/legislation_en.htm [22.04.2005]

⁴⁹ See: Steiner, Karin / Weber Maria E. / Zradhal-Urbaneck, Julia (2005): *ibid.*

A comprehensive definition of these criteria is essential: For instance the goal of “integration into the labour market” is usually operated via an integration quota. Therefore the essential task to be fulfilled within the framework of all the above mentioned processes is specification of the quota in question. Can only integration into the “first” (regular) labour market be called “integration”? Or can integration into the “second” labour market (protected) also be considered as success? Is the quota absolutely or relatively applicable for comparison of groups? In this context keeping the transparency of the goals⁵⁰ in question is very important for contracting bodies.

Criteria assessing the quality of tenders and training designs

The development of criteria and guidelines for conception, implementation and evaluation of training measures shall be interpreted as *quality-assurance* measures in vocational orientation/job counselling and *activation* measures.

In order to be able to compare the feasibility of the criteria in the offers stated the contracting body must guarantee that all members of the evaluation commission (and in the conception team) understand *quality* in the same way. The contract awarding process has to be seen as a substantial part of the whole quality assurance process.⁵¹

Galilaeer⁵² demands inclusion of educationally trained personnel (on both sides: contracting body and training institution) which would carry out the evaluation and the appraisal procedure, because only by that can it be ensured that the existing criteria are applied for an adequate quality-assured evaluation/assessment process, which is more than only formal testing of criteria fulfilment. Abif arrives at a similar conclusion in the yet quoted study accomplished in 2005.⁵³

The individual criteria shall always be in relation with the measure based requirements. Not all criteria to be formulated by the call for tenders are though important for implementation of a certain measure. The criteria mainly formulate requirements of the training institute as an organisation (e.g. financing, infrastructure, personnel requirements...) and also requirements of the implementation of the measures (e.g. methodical-didactical concept, target group relegated aspects...). By evaluation of these criteria it is possible to divide them into “obligatory” and “optional”.

Obligatory criteria

Obligatory criteria are usually those formulated directly by the contracting body or legislation authority. Their specifications shall be considered in the conception of the offers. These obligatory criteria are the basis for the examination of the offers. Failure to meet these criteria leads to exclusion from the appraisal procedure.

⁵⁰ See: http://europa.eu.int/comm/internal_market/publicprocurement/legislation_de.htm [22.04.2005]

⁵¹ See: Galiläer, Lutz (2005): Pädagogische Qualität. Persepektiven der Qualitätsdiskurse über Schule, Soziale Arbeit und Erwachsenenbildung, Weinheim / München, Juventa Verlag, p. 172.

⁵² See: Galiläer, Lutz (2005): Pädagogische Qualität. Persepektiven der Qualitätsdiskurse über Schule, Soziale Arbeit und Erwachsenenbildung, Weinheim / München, Juventa Verlag.

⁵³ See: Steiner, Karin / Weber Maria E. / Zradhal-Urbaneck, Julia (2005): Pädagogisch-didaktische Qualität bei der Aktivierungsmaßnahme 2005, unveröffentlichter Endbericht, Auftraggeber AMS Wien, Wien.

Formal obligatory criteria:Declaration of acceptance

- The supplier commits him or herself to consideration, observation and realisation of the general legal regulation and basic conditions in the measure (equality of treatment, report obligations, accounting modalities, transparency of the public funds use...).
- The supplier commits him or herself to the statements and warranties formulated in the concept. In the case of a positive evaluation of the concept they can be locally examined at any time by the contracting body (on-site visits).

General statements concerning the training institution

- Statement of the general basic conditions of the training institution for the conceptualisation and implementation of the measure: confirmation of economical reliability and liquidity, proof of eligibility and long experience in business, statement of all activities regarding to the placement of participants
- Declaration of the implementation of similar measures under indication of the name, implementation period, involved trainers (...) of the measure

Adherence to the temporal and formal guidelines for the participation in the assignment process

- Submission of the offers in correct format (e.g. locked "anonymous" envelope, use of a certain address on side of the contracting body...) and not later than the established deadline
- Drawing up of the concept on the basis of the pre-defined formal requirements; the supplier shall observe the format specifications (e.g. fonts, seize...) provided by the contracting body; the supplier shall avoid submission of documents the number of pages of which exceed the established limit
- The offer shall be signed by the (educational/management) managing bodies of the training institution
- Names of the persons in cooperation with which the concept was developed, their formal and professional qualifications as well as their affiliation/non-affiliation to the training institution shall be mentioned
- Names of the persons responsible for the planning and coordination of the concept for possible further inquiries (contact: E-Mail, telephone, times of the accessibility) shall be indicated

Content addressed criteria (with the reference to concrete implementation of the measure):

- Objectives of the measure (In cases where it has been pre-defined by the contracting body the training institution shall state in what ways the institute is able to reach these objectives.)

- Target group of the measure (In case where it has been pre-defined by the contracting body the training institution shall specify its qualification which entitles it to work with this outlined target group.)

Personnel

- The number of tutors in relation to the number of participants per measure is to be indicated
- Full-time and part-time personnel; Administrative- and training-wise distribution of personnel
- Formal and professional qualifications, experience of the trainers
- Certificates of the qualifications of the trainers

Infrastructure (room and technical facilities)

- Accessibility of the training site
- General space occupied by the training institution; rooms occupied by the general administration, as well as those for the planned measures
- Space available for the training measure; classrooms (groups), counselling and guidance rooms (for groups and individuals), social rooms (for participants and trainers),
- Technical infrastructure; IT equipment (hard- and software, available licenses); further technical equipment relevant for the respective training measure.
- Certificates of the premises and the technical infrastructure

Temporal basic conditions

- Duration of the planned measure (beginning and final date - calendar week)
- Course schedule (weekly course times, amount of weekly hours, Holidays, course-free times)

Participants

- Available seats/places taking into account the infrastructure and personnel resources of the training institution
- Course entry conditions and exit possibilities
- Description of target groups

Financing concept of the measure

- Financial concept for the measure taking into account the number of participants, the fees of tutors, etc.

Methodical-didactical concept

- Description of modularisation of the didactical-methodical concept (see 2.3.).
- Structured statement concerning teaching and learning contents taking into consideration the target group and the objectives of the training measure (see 2.2). These statements refer to the demanded contents and objectives in the call for tenders.

Optional criteria:

- Description of the institutional quality assurance and/or quality management system (What is the quality concept of the training institution? Which concepts and instruments does the institution use to assure quality?)
- Presentation of the personnel assessment procedures (recruiting of tutors): general agreements between tutors and institution, concerning their employment conditions
- Educational abilities of the tutors (special consideration further training activities for self-employed, part-time tutors): How does the training institution assure the tutors to attend professional methodical-didactical training for further self-improvement on a regular basis?
- Description of the communication process between the contracting body and the training institution

5.2.1.2. Exercises**Individual exercises:**

1. Define the main obligatory and optional criteria which your training institution had to abide in the last tender.
2. Remember, who was involved in making up the obligatory and optional criteria.
3. Imagine you are a manager of a contracting body making decision with respect to acceptance of bids. How would you estimate the criteria? Which criteria are most and less important to be observed by the training institution from your point of view? Set up a point rationing system including the most important quality criteria.
4. Compare "your" point rationing system with that of an official contracting body in your country.

Group exercises:

1. Discuss in your group what advantages and disadvantages the rationing systems and quality criteria checklists have!
2. Plan a tender for a vocational training (for target groups and goals of your choice) considering the assessment criteria. Structure it according to the "checklist" described in the theory part of this module. After each (small) group designs a tender in catchwords, the drafts should be introduced to the whole group (plenum).
3. Discuss the best practices of this module and try to find out with what you agree and disagree!

5.2.2. Training Orientation Design

5.2.2.1. Theory content

The content, objectives and the target groups are mostly defined by the contracting body in the call for tenders. The suppliers have to state in their offers (training design) how they will fulfil these requirements in the planned measure. Putting their signatures the tender participants confirm that they will fulfil conditions within the framework set forth and proceed accordingly.

1. Objectives

The goal definition incorporated in the planning phase of the course or program should be part of the concept and can basically contain all different kinds of aspects depending on the target group, the framework conditions and the intended length of the course.

The goals should take into account both the *internal* (related to the organisation of vocational training providers) and *external* dimension (related to the environment of the vocational training providers and the composition of the key actors). The following principles comprising internal and external dimensions describe the conditions of vocational training services to be expected by citizens when using such services. According to Cedefop the following principles⁵⁴ should be considered when defining the objectives:

1. Centrality of citizen

- Independence: the vocational training shall respect the freedom of the citizen/user in choosing career choice and personal development;
- Impartiality: the vocational training provided shall only comply with the citizens' interests, shall not be influenced by the provider, institutional and funding interests and be free of discrimination on the basis of the gender, age, ethnicity, social class, qualifications, ability, etc.
- Confidentiality: citizens have right to keep the personal data confidential;
- Equal opportunities: the vocational training provided promotes equal opportunities in learning and work for all citizens;
- Holistic approach: the personal, social, cultural and economic context of the citizens' decision-making basis is valued in the guidance process.

2. Enabling citizens

- Empowerment: the vocational training provided assists citizens to become competent when planning and managing their learning and career paths and the transitions therein;
- Active involvement: vocational training is a collaborative activity between the citizen and the provider and other significant actors, e.g. learning providers, enterprises, family members, community interests and builds on the active involvement of the citizen.

⁵⁴ See: Cedefop – European Centre for the Development of Vocational Training (ed.) (2005): Improving lifelong guidance policies and systems. Using common European reference tools, in: Cedefop reference series, 35 p., Luxembourg, p. 12 and 13. Available at: http://www2.trainingvillage.gr/etv/publication/download/panorama/4045_en.pdf [24.05.2011]

3. Improving access for citizens

- Transparency: the nature of the vocational training provided is immediately apparent to the citizen;
- Friendliness and empathy: training staff provide a welcoming atmosphere for citizens;
- Continuity: the vocational training provided supports citizens through the range of learning, work, societal and personal transitions they undertake and/or encounter;
- Availability: all citizens have the right to ask for guidance services at any point in their lives;
- Access: vocational training provided is accessible, flexible and user-friendly. You can contact the staff personally, by telephone or e-mail. The course can be attended at the time and in places suitable for the citizens;
- Responsiveness: vocational training is provided through a wide range of methods to meet the diverse needs of citizens;

4. Assuring the quality of provision for

- Appropriateness of vocational training methods: the vocational training methods used have an appropriate theoretical and/or scientific/empirical basis relevant to the purpose for which they are used;
- Continuous improvement: vocational training services have a culture of continuous improvement involving regular citizen feedback and provide opportunities for staff for continuous training;
- Competent staff: the staff providing training have nationally accredited competences in identification and addressing the citizens' needs, and where appropriate, selection of services meeting the individual requirements.

According to the European Union policy the purpose of vocational training is to⁵⁵ (These purposes listed below are important to be considered individually using the European policy priorities as the general orientation basis):

- enable citizens to manage and plan their learning and work pathways in accordance with their life goals based on their competences and interest in education, training and labour market opportunities as well as their self-employment thus contributing to their personal fulfilment;
- assist educational and training institutions to have well motivated participants (or "pupils", students and trainees) who take care of their future, take responsibility for their own learning and set their own goals to be achieved;
- assist enterprises and organisations to get well motivated staff capable to enter and gain benefits from learning opportunities both within and outside the workplace;

⁵⁵ See: Cedefop – European Centre for the Development of Vocational Training (2005): Improving lifelong guidance policies and systems. Using common European reference tools, in: Cedefop reference series, 35 p., Luxembourg, p. 14. Available at: http://www2.trainingvillage.gr/etv/publication/download/panorama/4045_en.pdf [24.05.2011]

- provide policy makers with perfect tools for achievement of a wide range of public policy goals;
- support local, regional, national and European economies through workforce development and adaptation to changing economic demands and social circumstances;
- assist in the development of societies where the citizens actively contribute to their social, democratic and sustainable development.

Based on the goals and principles stated above the concrete goals applicable for the indicator-based measurement of achievement (For precise measure planning the main goal shall be presented with detailed definitions and sub-goals) shall be formulated. The more precisely the goals (definitions)⁵⁶ are presented, the more accurately participants can be assigned to the measures. The definition of goals of a measure lies in the responsibility of the institutions which are politically entrusted with the execution of labour market policy. The sub-goals must be transparent in the concept.

Please find below the example of detailing of concrete objectives⁵⁷ (see: [7.2.](#)).

Policy Priorities	Objectives
Employability	Competences and attitudes Completion/ drop-out Transition to employment Quality of employment
Matching	Information/ knowledge Responsiveness Adaptation/ flexibility Innovation
Access	Basic competences for everyone Targeted provisions Participation rates of certain groups Permeability/ transparency

The goals related to the content usually comprise five dimensions:

- vocational orientation
- educational and vocational choices
- soft skills promotion
- health
- life and career management and job-finding.

The goals can also contain a minimum job-finding rate if the call for tender requires it.

⁵⁶ Differentiated into designated aims, general aims and specific aims under consideration of the learning targets taxonomies.

⁵⁷ See: Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Education and Training, Interim Report of the European Forum, p. 16. Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [24.05.2011]

2. Target group

In order to design a training measure appropriately it is first of all necessary to know which target group will attend the course. The following different characteristics of participants should be clarified before composing a training design.

Participants are guided by different needs in achieving their targets associated with getting adequate educational, vocational and labour market orientation.

- **Adolescents** (15-25 years) need to make either educational or vocational choice after graduation. At this stage they balance advantages and disadvantages of educational and vocational choices and try to find out their interests, dispositions and talents. The factors of individual socialisation, individual interests and abilities, gendered role attributes, information on educational and vocational paths as well as momentary labour market trends play a significant role. Moreover educational and vocational choices and performance is mainly determined by the socioeconomic status of the adolescents' parents as well as their educational and life ideals. Lack of information, pressure of the family traditions, parents' ambitions with regard to their children when the children are forced to choose the profession of one of the parents also play an important role. Parents mostly perceive the abilities and talents of their children in a biased way, that's why it is important to inform parents about educational and vocational paths and labour market trends as well. Personality, interest and ability tests for adolescents can be used in the framework of vocational orientation, measures in order to identify strengths, weaknesses and abilities. Within the scope of vocational orientation measures, the fact that educational and vocational orientation is not clear, as well as, that self-presentation abilities and job application still need to be developed shall be taken into special consideration. To be oriented with respect to the training paths, personal advantages, disadvantages and abilities in relation to the labour market need to be identified. The goal of the vocational orientation and activation courses is identification of the unique selling points of each participant. Besides this adolescents learn how to look for apprenticeships and jobs and write "blind applications".

- Women after the **baby break** and **job changers** are target groups that become more and more important within the scope of vocational orientation and activation due to major and fast changes in the labour market. Existing vocational competences can become less valuable due to technological changes, especially due to the lack of exposure to the labour market. In that case the participants will need counselling with regards to possible new key qualifications and further training possibilities. A new vocational orientation can also become necessary for people whose physical, psychological or mental ability has been impaired, those who suffer from any kind of disease or allergy which prevents them to do their former job. But people may simply want to change their current job when they are not happy with it any longer.

In any of these cases it is important to point out the different vocational training possibilities and labour market trends. The participants should be supported in their labour market orientation, their vocational training choices and should learn how to look for relevant information and to actively exploit it.

Retraining in presentation and job application techniques should will be required as it will have been some time since these skills were last used as they were used and procedures and requirements might have changed (e.g. assessment centres).

Women (as well as men) after the baby break have the same needs as mentioned above with the additional need for information and counselling with regard to organisations of child care, households, time and self-management.

- Aside from the abovementioned needs **long-term unemployed participants** need support with regard to their self-management and ability accustom themselves to prescribed time schedules as they will not have been involved in a daily working routine for a long period of time. Other social problems, such as housing problems, high loans, drug addiction and alcoholism, delinquency and imprisonment can also be problems that might interfere with a necessary vocational orientation.

- Due to low birth rate the age limit of working population and thus job seekers keeps extending. These demographic changes are linked to the new demands on the labour market, e.g. an intensified international competition between enterprises, fast structural changes (branches, management and activity structure), technological change, e.g. changes in production technologies and work organisation. In reply to the changes enterprises often develop new business and reorganisation strategies affecting older employees. For these reasons vocational orientation for and activation of **older people** is aimed at informing people of these new requirements and identifying individual strategies to cope with this situation. It should show new training possibilities and motivation for a new start.

- **People with disabilities, people who are rehabilitating and people with special learning needs** have similar but also additional needs as the abovementioned groups among participants. According to their specific needs the training shall deal with or offer possible solutions.⁵⁸

Their main “problems” are specifically over- or underestimated deficits, sickness or disability as a “taboo” subject, as well as, a non-acceptance of the actual situation and a resulting in feeling of helplessness. Important goals of vocational orientation and activation for this target group is therefore a perception, coping and an active acceptance of disability, unfocussed versus realistic job goals, a realisation of overextending vocational activities, the pressure resulting from own high expectations, motivation for a new start, realization, openness and acceptance of psychological impairment, individual strategies in the field of reintegration into the labour market, the organisation of everyday life routines before starting to work as well as the possibility to gain work experience in scope of placements.

- **People with migration background** have similar but somehow individual problems compared to other groups in the labour market. First of all they quite often have language deficits (their mother tongue being different to the domiciled country), a lack of social contacts and problems with the acknowledgement of their educational certificates and diploma. These documents often don't comply with the national standards of the labour market, that is why the people rarely know much about vocational training or job opportunities, where and how to look for a job and which rules during the application procedure are to be followed. With regards to these problems they should be informed which labour market specific orientation offers exist specifically for migrants.

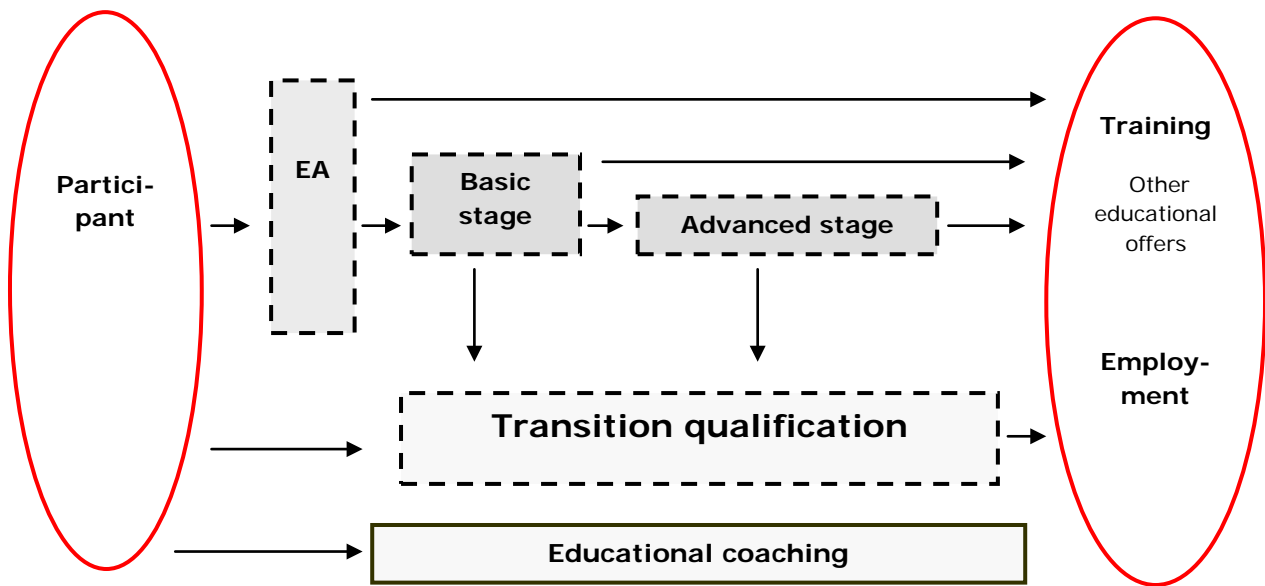
According to the target group definition it is also important to know how **diverse** the group will be. The more diverse the group is the more space one will need in order to satisfy different needs of the participants. A completely homogeneous group can be boring for the participants as only new views and experiences (aside from the ones of the group trainers)

⁵⁸ For vulnerable groups the main factors which contribute to better access to vocational training are outreach activities, the availability of systems for the provision of information, motivation, vocational preparation and guidance as well as the availability of targeted offers for vocational training.

can stimulate personal development. A extremely diverse group can be exciting but the chance to comply with everyone’s needs within the group becomes limited.

3. Contents

Educational measures in preparation for a profession include several qualifying levels tuned to each individual case (analysis of suitability, basic stage, advanced stage, transitional qualification) and complemented by continuous educational coaching.



EA = Analysis of suitability

The basic stage is complete when the participant has made a decision on his/her choice of profession and is able to use in practice the personal capacities and skills acquired at vocational training. In the event that the capacity to pursue vocational training or employment has not been obtained after the basic stage, further pre-vocational qualification is planned in the so-called advanced stage. The content has to be clearly set forth by contract.

Entry into the transitional qualification stage is possible any time, either directly (e.g. also without undergoing an analysis of suitability) or from the basic or advanced stage.

The contents of the qualification levels are, with the exception of the analysis of suitability, conveyed by means of the promotion and qualification sequences listed below:

- Professional orientation/ selection of a profession
- Basic professional skills
- Soft skills (see “soft indicators” under point “Achievement of objectives by considering results”)
- Technical qualification (e.g. IT-knowledge)
- Workplace-related familiarisation

- Application and interview training
- Language training
- Area of general fundamentals and subsequent graduation from secondary school.

Note: If the vocational training provider carries out neither the labour market demand analysis nor the target group analysis, but arranges these services to be rendered by other institutions (this happens in many cases), the training provider should attach documents of the contractor of these services to the tender.

4. Didactics

Didactics is the theory and practice of teaching and learning processes. It deals with the analysis and planning of training and its framework conditions. In scope of adult training there are no “true” currently used didactic models. All didactic models usually deal with the following aspects:

Who (tutors) teaches whom (target group), what (contents), what for (goals), how (methods), by what means, when and where (framework conditions), with which success (evaluation). These factors influence each other and interact with each other. Moreover one of the principles of adult training didactics is to be built based on existing learning needs, possibilities and strategies of the participants. The learning goals are oriented towards the individual situation and needs of the participants.

The following didactical approach can be seen as a possible approach being used in many vocational orientation and activation training programs in AUSTRIA. It contains thoughts on training ethics, general behaviour of trainers in scope of the course and framework conditions.

The **training ethics** lie behind everything and influence the course success and the cooperation with the participants to a large extent, even though it might not be visible from the very beginning:

- to have an appreciative attitude towards the participants
- to recognise different learning and information processing strategies, especially if the target group is diverse (diversity management)
- to enable the equality of (social and vocational) chances of people with different life chances (i.e. women, migrants, people with disabilities, people with special learning needs, people with low qualifications)
- to realise individual possibilities and special needs of each participant
- to use a resource versus a deficit orientated training approach
- to activate personal resources
- to put individuals in the centre of the training course
- to promote the activities of the participants and self-solving potential
- to reduce the drop-out rate by enhancing motivation
- to consider existing knowledge, abilities and experiences, i.e. the whole background of an individual as well as individual competences
- to promote networking among participants by considering the life experience of each participant

- to perceive unemployment not only as an individual but also societal and economic problem
- to design training courses tailor-made (specifically oriented towards the target group needs)

It furthermore defines the **general behaviour of trainers** in a course:

How to give information and enhance the knowledge of participants:

- to give factual information on education, vocational orientation and labour market trends in a clear and understandable way
- to structure information, visualise it and communicate it through different methods
- to complement theoretical facts with practical examples
- to offer further information opportunities
- to motivate the active information processing and cooperation with other within the scope of the training
- to guarantee breaks, activity and movement phases within the scope of the training
- to consider differing learning and information processing speeds of the participants
- to hold discussions on different contents related to the topic

How to promote vocational orientation processes:

- to work on realistic job expectations
- to consider the actual framework conditions on the labour market
- to adjust the personal qualifications and needs to the actual labour market situation
- to promote the identification of individual possibilities
- to design the training offer according to the participants' need

How to promote self-experience:

- to give feedback on and promote soft skills
- to enable discussions on personal problems in scope of vocational development and future plans
- to help to accept personal limits
- to react on disruptions during the training adequately by addressing them directly

How to promote key-qualifications:

- Promotion of usage of new technologies (PC, internet, internet searches, platforms)
- Reduction of insecurities and fears by practice
- Using different media

How to apply methods:

- to explain the reason for using a certain method, if necessary
- to apply methods in a reasonable way and according to the group process

- to enhance the autonomy and personal responsibility by using group work that is facilitated by the trainer
- using different methods according to the group's needs
- offering individual coaching if needed (especially for disadvantaged participants)

It also defines how the framework conditions are adjusted to the individual needs of the target group:

- to consider the target group needs when designing the time frame of the course
- to consider the largeness of the training rooms, social rooms and individual coaching rooms
- to consider the adequacy of the media the trainer intends to use

5.2.2.2. Exercises

Individual exercises:

1. Define the main goals of the vocational training at your institution in the most precise way.
2. Divide the main goals into sub goals and describe in 2-3 sentences how you would estimate them.
3. Imagine you are a manager of a training institution wanting to submit a tender on individual courses for participants chosen by on your own. How would you proceed? Set up an offer including the most important aspects (in catchwords).
 - a. Goal
 - b. Target group
 - c. Content
 - d. Time
 - e. Budget

Group exercises:

1. Discuss in your group what specific training need 30 - 45 aged women with low qualification level and who are mainly responsible for child care have!
2. Discuss what methods should/could be applied for adolescents within the scope of a vocational orientation/activation course!
3. Design a vocational orientation and activation program for the following target group with the following goals:
 - a. **Target group:** Women after the baby break whose children are in daily child care
 - b. **Goals:**
 - to support their vocational orientation and activation process adequately

- to teach them ICT and working techniques skills (project management, process management, moderation techniques, team work)
 - to support job choices fitting child care duties
4. Discuss the training ethics described in the Austrian best practice of this module and try to find out on with what you agree and disagree! Try also to find new possible ethical standards!

5.3. Domain 3: Staff Policy & Trainer Competences

5.3.1. Staff Policies

5.3.1.1. Theory Content

The quality of tutors, especially in terms of their qualifications and competencies, has a great impact on the quality of training procedures. Therefore, training institutions must provide adequate staff, which means that the staff must possess qualification adequate to their roles.⁵⁹

Training institution staff policy

The structure of the organisation and its staff policies are an important quality assurance factor of an institution.⁶⁰ It influences the role played by each individual tutor whilst the staff policy of the institution simultaneously influences the structure of the organisation. The “family tree” can provide a view of the organisational structure from which the responsibility breakdown as well as the competence areas of every individual involved in the organization and their suitability within the framework of the organization structure is obvious.

(Which qualification and competence profiles are held by staff with specific functions and positions?)

Questions: How is the staff structure established: How many tutors/staff members are employed full time, how many part-time and how many are freelancer? How many staff members are active in the administration? Are there financial and academic management roles within the institution? Is the structure hierarchically developed or not? Does the structure enable continuous improvement? Does the structure enable all members of the staff to undertake their role effectively?

Apart from the analysis and definition of the organisational structure, a central task of staff policy is the establishment of procedures for staff assessment, recruitment and development.

⁵⁹ Training institutions usually have descriptions and definitions of how they provide staff in their Quality Management Systems.

⁶⁰ See: Burri, Thomas (2004): EduQua - Handbuch – Information über das Verfahren, Anleitung zur Zertifizierung, Thalwil, p. 24. Available at: http://www.eduqua.ch/pdf/eduqua_handbuch.pdf [27.05.2011]

Further education of staff members

The life-long learning commitment is fundamental. The staff is expected to make use of training and development to enable themselves to respond flexibly to changes as well as to guarantee high quality services.⁶¹

Siebert⁶² noticed that in general, educational institutions often neglect what is described in professional terms as *Skill management*. *Skill management* deals with the long-term professional development of existing staff by means of further educational measures. As soon as recruitment in educational organisations has occurred, development of their own staff often gets ignored, perhaps, in part, because *education* and *training* are the main focus of their daily work. However, in free market enterprises, staff development and policy are given much greater emphasis than in public educational facilities and enterprises; although in free market enterprises the attention paid to the further education aspect is still insufficient.

Employment conditions

One of the main problems in most of the training institutions (public as well as free market institutions) is that fulltime employment is the exception rather than the norm. In training practice freelancers, self-employed and part-time employed trainers (discontinuous, precarious employment at low fees) outweigh the full time employed tutors. This is a big problem insofar, as discontinuous employment and low fees affect the quality of training measures. Galiläer outlines several reasons for this:⁶³

- lack of identification with the employer's (training institution) objectives
- tutors have more than one role, which among other things lead to a lack of job satisfaction
- high staff turnover
- few further training possibilities.

The staff policy of training institutions shall address and approach this problem. No matter how well a course or its curriculum is prepared the success of a training course depends on the tutors. Therefore the institution must cooperate closely and respectfully with its tutors. The institution staff should be encouraged by reasonable employment contracts and adequate fees.

Formal aspects

Statement on the staff recruitment procedures and documentation of the assessment procedures:

⁶¹ From University of York: Staff Training and Development Policy
http://www.york.ac.uk/admin/persnl/strategy/2001/b_train.htm [03.02.2011]

⁶² See: Siebert, Horst (2003): Didaktisches Handeln in der Erwachsenenbildung - Didaktik aus konstruktivistischer Sicht, München, Ziel-Zentrum F. Interdis, p. 275ff.

⁶³ See: Galiläer, Lutz (2005): Pädagogische Qualität. Perspektiven der Qualitätsdiskurse über Schule, Soziale Arbeit und Erwachsenenbildung, Weinheim / München, Juventa Verlag, p. 167.

- The organisation must have a standardised personnel recruitment and assessment procedure; personnel provision, qualification and competence requirements must be defined. *Which criteria are used for selection of tutors in most cases?*⁶⁴
 - expertise
 - pedagogic skills
 - previous experience with the target group
 - previous experience as far as the course content is concerned
 - knowledge of equality issues
 - level of self awareness
- The assessment procedure must involve not only senior academic staff but also professional human resources;
- The training institution shall offer standard position-related wages and contract conditions (collective agreements); the conditions for full-time, part-time and freelance tutors must be unambiguously set forth by the contracts in question.

Measures aimed at raising consciousness of the concept of tutorial work quality:

- The training institution should ensure a working environment making the tutors realise their work influences the reputation and *quality perception* of the whole institution; they must be aware of their individual contribution in reaching goals aimed at quality of the teaching. Tutors should possess *quality consciousness* when doing their work.
- The training institution allows further education for the trainers; this training can be offered either in the training institution or externally. Further training activities shall be promoted in with regard to improvement of social competences as well as professional and methodological-didactical skills. The institution is responsible for equal application of this regulation to all tutors regardless on their employment conditions – full-time, part-time or freelance. In particular, new staff should be encouraged to participate in further training activities. Incentive systems aimed at encouragement of interest in further training should be worked out.

Staff policies set out the rules and procedures the staff shall be aware of. Policies help employees to understand what is expected of them as well as how they should act. They also advise employees of the rules and rewards available to them. Clear policies help organisations to identify and to prevent potential risks to employees and ensure organisations' compliance with the law. They help to create an attitude allowing issues to be dealt fairly and

⁶⁴ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 51.

consistently⁶⁵. The following policies may be considered representative of many organisations⁶⁶:

- **Equality policy and race equality policy**

Equality of opportunity is promoted, and barriers which might result in people being placed at a disadvantageous condition are excluded. Discrimination and prejudice are not tolerated, and equal opportunities are the responsibility of all staff. Personnel are informed of the current and new legislative requirements. Furthermore, there is a commitment of elimination discrimination on the grounds of sex, marital status, sexual orientation, race, colour, nationality, religious belief, age, disability, creed, or national origins.

- **Bullying and harassment policy**

Bullying and harassment are not tolerated. There is a commitment of assurance to an environment free of fear, victimisation or harassment.

- **Learning Development Policy**

There is a commitment of staff's learning and development. This can be proved by achievement of the Investors in People award (IIP), a business improvement tool designed to advance an organisation's performance through its people.⁶⁷ Every effort is aimed at achievement of the balance between the needs of the individual person and the organisation.

- **Staff Induction Scheme**

Employees are required to attend an induction when they join an organisation. This is to ensure that:

- the staff is aware of the organisation's vision, mission and strategic objectives, and clearly understand their role in the organisation.
- the staff is aware of their employee-related responsibilities.
- human resource administration matters are dealt with thoroughly and promptly.⁶⁸

Also, induction schemes ensure that each new employee:

- becomes fully acquainted with the organisation and its objectives and realises his/her contribution in achievement of its objectives and goals.
- is supported through their initial period of service in a structured way with all the guidance and advice that might be required.⁶⁸

Induction packages are often provided to all new employees when they join the organisation.

- **Child Protection**

The Sexual Offences Act 2003 is designed to protect the public from sexual crime covering offences against adults (including people with mental disorders), offences against children, and domestic offences. The staff shall be informed that they should be aware of the legislation and their obligation under it. Police shall be notified of any suspected transgressions with regard to the Act which shall be dealt in accordance with the organisation's disciplinary procedures.

- **Disciplinary Procedure**

⁶⁵ <http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1073982502> [27.05.2011] Set up employment policies for your business.

³ From City College Norwich: Staff Handbook, Section 3, p. 25-29.

⁶⁷ Investors in People: What is Investors in People?

<http://www.investorsinpeople.co.uk/IIP/Web/About+Investors+in+People/What+is+Investors+in+People/default.htm> [03.02.2005]

⁶⁸ See: City College Norwich: Staff Handbook, p.27

The procedure is designed to encourage employees to achieve and maintain acceptable standards at work. The procedure also helps to ensure fair treatment for all staff members if disciplinary action is applicable to them. The procedure incorporates a number of stages. In the Informal stage efforts are made by the line manager to resolve the matter by informal discussion. Employees have the right to be accompanied by a trade union representative or work colleague at this stage. Employees can then receive an Oral Warning, a Written Warning and/or a Final Written Warning. Dismissal may occur if a final written warning has been issued and the way in which the work is carried out does not comply with acceptable standards.

- **Capability Procedure**

This procedure is aimed at encouragement of all employees to achieve and maintain appropriate work standards. The purpose is to ensure fair treatment for all and to assist any employee who is considered to experience difficulties in performing his/her functions. There are four stages of this procedure:

- Stage 1 – Informal Procedure
- Stage 2 – First Formal Interview
- Stage 3 – Second Formal Interview
- Stage 4 – Dismissal Interview

Issues of capability should be generally resolved with no reference to the formal capability procedure.

- **Rehabilitation of offenders**

New employees are required to disclose any criminal convictions and cautions. Any information provided is treated confidentially and is considered only in reference to the position for which the individual is appointed.

- **Grievance Procedure**

This aims to resolve individual grievances fairly and promptly. There may be four stages to the grievance procedure:

- Stage 1 – Informal Discussion
- Stage 2 – When a complainant feels the matter has not been resolved at Stage 1.
- Stage 3 – When the grievance has not been resolved at Stage 2.
- Stage 4 – If a complaint is not resolved to employee's satisfaction at Stage 3, he/she may further appeal.

This applies to all members of staff.

- **Staff code of conduct**

The staff code of conduct includes the following elements:

Behaviour – Every member of staff is required to take responsibility for his/her own behaviour and to modify it if necessary.

Respect – It is the duty of every member of staff to treat colleagues with respect.

Appropriate use of language – All staff is required to use appropriate language at work. The staff shall be informed that they should neither talk in a patronising way to their colleagues, nor tell sexist jokes.

Appropriate dress – The staff is required to dress appropriately at work.

Right not to be harassed – Harassment is defined as any conduct which is unwanted by the person towards which it applied, or any conduct affecting the dignity of any individual or group of individuals at work.

Personal relationships – The staff members shall ensure that they do not enter relationships that conflict with their professional duties and private life.

- **Raising Concerns Procedure**

This is intended to encourage all staff to inform management if they are concerned about serious malpractice within an organisation.

5.3.1.2. Exercises

Individual exercises:

1. Define the main policy aspects which should be taken into account by a training institution (at least 6). Does your institution take these criteria into consideration?
2. The criteria for the selection of tutors are: “expertise”, “pedagogical skills”, “previous experience with the target groups”, “previous experience with relation to the course content”, “knowledge of equality issues” and “level of self awareness”. Imagine you are a manager of a training institution or an external evaluator, how would you assess your tutors on the basis on these criteria?

Group exercises:

1. In many training institutions a large proportion of training hours is held by freelance tutors. To what extent does this situation influence the training institution and the quality of the vocational training measures? Please discuss the main advantages and disadvantages especially with regard to the staff and learning conditions.
2. Discuss to what extent the employment status of the tutors determines/influences their expertise.
3. What kind of support for tutors (with regard to the working conditions) should the institution provide? Provide relevant arguments.

5.3.2. Competence and Qualification of the Tutors

5.3.2.1. Theory Content

„The job of in-company tutors is to bring together the structure of work and the structure of learning and to encourage people to learn from each other. They must successfully incorporate social and economic innovations into training arrangements with company performance.“⁶⁹

The qualification of the tutors is seen as a basic condition for provision of effective and high quality training measures.

⁶⁹ See: Cedefop – European Centre for the Development of Vocational Training (ed.) (2006): Vocational Training in Europe, in: cedefopinfo 1/2006: Luxemburg, p.3. Available at: <http://www2.trainingvillage.gr/download/Cinfo/Cinfo12006/Cinfo12006EN.pdf> [20.06.2011]

Education

Tutor's training takes place in dedicated post-secondary establishments such as colleges of teacher training and colleges of vocational education as well as at universities.⁷⁰ As the Bologna Process unfolds and comparable degrees are introduced in higher education, all of these training measures, with the exception of those which are offered at universities, will be brought under one roof in tertiary colleges of education.⁷¹

However, a degree-level qualification is not always necessary to be a trainer. Applicants are primarily expected to possess specialised know-how. This means practical training on the job, supervision and feedback (e.g. by interviewing participants) and are often considered the most important strategies for getting tutors' competencies. Because of the diversity described above, there are various sets of entrance requirements for training.

The training institution shall define and document **the minimum required standards for the tutors** (formal and professional qualification, education, age, relevant professional experience):

- Formal qualification requirements - educational and professional aspects. In an exceptional case, employment of tutors with discontinued education is possible if they are able to show perennial professional experiences (about six years). A proof of the educational background and of the work experiences of the manager of the training institution as well as that of the trainer staff verified by the labour market office is required.⁷²
- Compulsory educational programs for professional qualification must be defined by the training institution: e.g. certification based on a university-degree teaching program (social or vocational teaching, or further education), or sociology or psychology. Also, training and education programs designated as formal admission requirements shall be established.
- Trainers who will be used in the more practical fields of the vocational qualification programs should have an instructor license as well as the appropriate professional qualifications.
- Professional experiences are also important – including practical work experience in vocational orientation/job counselling and activation fields. This practical work experience has to be illustrated by appropriate testimonial references. (e.g.:
Instruction and training experience in adult education, in other training situations;

⁷⁰ See: Hausegger, Gertrude/ Bohrn, Alexandra (2006): Quality in labour market policy training measures. The work situation of trainers as relevant factor to the quality of the measures? Interim report. Module 3: Learning procurement system – labour market policy services, Wien, p. 17. Available in German at: http://www.pro-spect.at/docs/improve_zwischenbericht_juni06_de.pdf [20.06.2011]

⁷¹ See: Cedefop – European Centre for the Development of Vocational Training (ed.) (2006): Vocational education and training in Austria, short description, in: Cedefop Panorama Series, 125, Luxemburg, p.49. Available at: http://www2.trainingvillage.gr/etv/publication/download/panorama/5163_en.pdf [20.06.2011]

⁷² See: Bundesinstitut für Berufsbildung (1999): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geförderten Weiterbildung, Anlage 4a, in: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, wbv Verlag, p. 10.

counselling and coaching experiences in a psychosocial work field, general consulting experiences). According to the Bundesinstitut für Berufsbildung (Germany), tutors shall demonstrate at least two years of professional experience in educational or/and vocational training in the field of adult education as much as possible. This is needed as the tutors should serve as a “role model”. Participants should hold the tutor in high esteem, in order to be eager to learn during the training.⁷³

In addition to educational and professional qualifications and experiences, pedagogical and “soft” skills and experience are necessary.

- Personal Competences: Tutors should know how to manage issues associated with gender and diversity, they should have foreign language skills, certificated conflict, mediation and counselling competencies, and also social analytic and research knowledge. (Note: Additional personal qualifications should be proven by appropriate examinations and certificates.) Furthermore it is necessary to possess learning aptitude as well as the ability to reflect.
- Method (pedagogical) knowledge: Tutors must have adequate knowledge of methods for individual and group coaching situations. The success of learning depends considerably on how the learning matter is provided. Over the years the integrative learning, which means that participants actively participate in the course, has become more and more important. The tutors do not serve as an “instructor” any more but rather as a moderator who activates, accompanies and moderates the learning process.
- Social Competences:
Empathy: Tutors must be able to understand the life situations of the “target group”, analyze situations with professional detachment without being influenced by individual circumstances.
Conflict ability: Tutors must have adequate presentation and mediation knowledge for their target group. Tutors must be able to handle participants in individual and group coaching situations adequately. Tutors must have the ability and competence to handle communications and any conflicts with authorities who are responsible for the (inadequate) assignment of participants.
- Expert know-how: Tutors must have proven knowledge of the dynamics of the labour market; they should have relevant information concerning different vocational fields, career profiles and the supply and demand situation of the labour market. They have this knowledge, in part, as a result of their formal and professional qualifications, and also as a result of professional experience in the working context. In addition to this,

⁷³ See: Bundesinstitut für Berufsbildung (1999): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geförderten Weiterbildung, Anlage 4a, in: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, pp. 10-12.

tutors must be prepared to participate in further training activities within their field.⁷⁴ Further training activity should be supported and promoted by the training institution. At least once a year all pedagogical employees should participate in further educational trainings.⁷⁵

There is a range of qualifications the tutors should possess to indicate their effective professionalism in the careers consulting. These include National Vocational Qualifications⁷⁶, Certificates⁷⁷, and Awards⁷⁸ relating to: Information, Advice and Guidance, Learning and Development⁷⁹; and Careers Education and Guidance. The qualifications that careers advisors tend to possess incorporate many competencies which are necessary for their profession. These include the following:

- A knowledge of advice and guidance information

Tutors must have the ability to access, prepare and provide advice and guidance information. In particular, tutors must be able to advise clients on job search tactics and strategies, covering obtaining and disseminating up-to-date information about the labour market, careers, occupations and opportunities for employment, training and further study. This skill is important both in terms of theoretical principles and actual practice and it may be necessary for consulting both individuals and groups. Tutors should also have knowledge of employment regulations, legislation and methods.

- Knowledge of the emotional skills necessary for gaining employment as well as the ability to provide guidance on the skills in question

Tutors may be asked by the clients to advise on issues such as social and emotional competence skills, including body language, self-insight, self-esteem, impulse control and empathy. They may be also inquired to consult with regard to motivation and its development.

- The ability to provide training

Tutors must have the ability to identify clients' training needs and other requirements. This may include understanding individual learning needs. The ability to design training and development sessions is also of importance, as are presentation skills. In addition, tutors must be able to design careers education programmes, suggest speakers and contribute to sessions. During the training process the knowledge of group dynamics and ability to resist conflicts may be required.

- The ability to work with people with special needs.

⁷⁴ Note: If the trainers do not show this kind of knowledge the training institution must offer experts who can be asked for advice concerning labour market related questions. Those training institutions which neither offer qualified trainers nor experts of the labour market have to organize these services somewhere else.

⁷⁵ See: Bundesinstitut für Berufsbildung (1999): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geförderten Weiterbildung, Anlage 4a, in: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, p.11.

⁷⁶ For example, Level 4 NVQ in Careers Education and Guidance

⁷⁷ Advanced Certificate in Information, Advice and Guidance and Advanced Certificate in Providing Advice and Guidance (2003)

⁷⁸ For example, Intermediate Award in Developing Information, Advice and Guidance Skills (2003)

⁷⁹ See: City & Guilds: Level 3 NVQ in Learning and Development, Candidate Pack, London, City and Guilds.

It may be necessary for tutors to be able to give advice to groups of people who are in need of special support. This might include those with a low level of education, social problems, physical/psychological impediments or people who find themselves excluded for social or economic reasons.

- The ability to plan

Tutors must be able to plan the information deployment, recommendations and guidance interactions. Tutors may also be asked by the clients to assist in planning and implementation of their own action plans in relation to their career, especially with regard to employment, education and training. Tutors may also help clients with preparation for an interview or assessment day.

- The ability to establish positive working relationships

Tutors should know how to establish contact with clients, in order to enable them to gain access to the service. They must be flexible when contacting clients whose situations and needs are different. Tutors should also know how to provide support for other practitioners and should be able to operate within Networks to support information, advice and guidance.

- The ability to provide counselling

Tutors should possess counselling skills to give an appropriate piece of advice and work out the plan of interaction with the client. The trainer may need to support the discovery of clients' abilities and interests as far as selection of a future profession is concerned. Tutors may be required to support the client's job-related decisions and their realisation, and also to help to solve problems occurring during this process. It may also be important to understand the social and cultural background of the clients in order to support this process.

- The ability to evaluate and develop contributions

Tutors must know how to evaluate and develop their own contribution to the service, and also how to evaluate training and development programs. They must also be able to identify the contribution of careers education and carry out guidance of achievement of the organisation's specific values, aims and objectives.

- The ability to assist clients to gain access to other services

Tutors must be able to liaise with other services. This may include acting as an advocate for a client, including representing the client at formal proceedings. Liaising with training providers, teachers, parents, learning mentors and other agencies to ensure a complete service to clients may also be important. Tutors must also know how to operate referral procedures in relation to advice and carry out guidance.

- The ability to negotiate

Tutors shall be able to negotiate and maintain service agreements and secure resources for the work of the service.

- The ability to manage information and activities

Tutors shall be able to manage their personal case load and their own activities to meet the requirements of the service. Tutors also must be able to establish and organise information management and communication systems, manage information resources, as well as make detailed computerised records of interaction with clients. Tutors may also be responsible for planning and organising careers fairs and conventions.

- The ability to propose projects

Tutors should have the ability to propose projects for the service appropriate for the relevant careers issues.

- The ability to promote careers education

Tutors may be required to promote the position of careers education and guidance, as well as specific projects, within their organization or within the community. They may also need to determine methods for disseminating information, such as attending conferences and writing for professional journals and the press.

- A knowledge of personal roles and responsibilities

Tutors should understand their own responsibilities and rights in relation to advice and guidance practice, and should ensure that they work within the framework of information, advice and guidance standards. Tutors should also act based on the ethical code and understand ethical issues of the careers guidance.

- The ability to use skills assessment tools with regard to the careers guidance practice

Tutors may need to use psycho-diagnostic instruments and methods and explain results generated by these to the clients in a comprehensible way. Specifically, tutors may be required to use computer-aided guidance packages, psychometric tests and personal inventories.

- Institutional training and networking

Tutors should be able to provide advice regarding job-search training for external institutions. They should also be able to integrate knowledge obtained at the other training institutions into their own practice, and appreciate the differing values and models of other organisations.

Assessment of Skills and Competencies

Skills and competencies may be assessed in a number of ways⁸⁰ which are discussed in this section. The skills and competencies listed above are usually assessed by actual work-based performance although past experience may determine an individual's start point on a qualification. Areas of competence may also be illustrated by demonstration of work and provision of answers to questions about work. The evidence that illustrates competencies should be recent (created within the last three years). Claims for accreditation for prior learning must also be subjected to some form of testing to ensure that the individual still has the claimed competence. Types of assessment evidence may include:

- Assessor observation reports

The reports consist of assessor's observations on how the person being tested carries out his/her routine work. The individual works under observation and the assessor attempts not to be too conspicuous when rating the individual's skills, knowledge and understanding. The assessor then makes up an observation report.

- Work products

⁸⁰ See: City & Guilds, Level 3 NVQ in Learning and Development, Candidate Pack, London, City and Guilds, pp. 15-19.

“Outputs” of performance in the workplace can also act as assessment evidence. These might include:

- artefacts and documents, such as copies of materials created for clients, reports made on clients’ progress or on personal training activities undertaken
 - reports from relevant work projects and activities (e.g. evaluation of systems and procedures)
 - reports of professional discussions with assessors
- Witness testimonies

Witnesses may confirm that a particular piece of work was completed by a particular individual by signing and dating the work, or they may offer a written account of the individual’s performance. The witness used should be fully aware of the standards being used for assessment.

- Questioning

The individual may be asked written or oral questions by an assessor to confirm that he/she possess knowledge and understanding associated with competent performance. For oral questions, the questions and answers should be audio-recorded. For written questions all documentation should be provided.

- Professional discussion

This can be used when an individual shall describe, explain and evaluate aspects of work which cannot be illustrated in other ways. This should take place at the workplace so that the assessor can be shown work products which cannot be taken out of this environment because of complexity, security or confidentiality. A record of the discussion can be written, video-recorded or audio-recorded.

Conclusion: Continuous efforts should to be undertaken in continuous training in both fields, in professional and pedagogical qualification. This means that tutors must constantly train themselves. Having to learn throughout one’s career means fixed curricula are much less useful than flexible continuing training at the workplace.⁸¹

In order to guarantee quality of tutors’ competences, the qualification of tutors is subject to regular evaluation.

“In the quality control and development models, the qualification of the tutors is defined in the principle as a constituent part of the institutional framework conditions and, along with other criteria, evaluated twice to assess the quality of an organisation regarding its personnel development and planning, on one hand, and to judge the quality of the educational process, for example, using a concrete training measure, on the other. The training institution should attest the qualifications of the trainers regarding the measures in a differentiated manner.”⁸²

⁸¹ See: Cedefop – European Centre for the Development of Vocational Training (ed.) (2006): Vocational Training in Europe, in: cedefopinfo 1/2006, Luxemburg, p.3. Available at: <http://www2.trainingvillage.gr/download/Cinfo/Cinfo12006/Cinfo12006EN.pdf> [20.06.2011]

⁸² See: Hausegger, Gertrude / Bohrn, Alexandra: Quality in labour market policy training measures. The work situation of trainers as relevant factor to the quality of the measures? Interim report. Module 3: Learning procurement system – labour market policy services, p. 18.

5.3.2.2. Exercises

Individual exercises:

1. How may the skills and competencies of tutors be assessed? List the most relevant methods.
2. Think about the last training you held or attended. Are the tutors were experienced in training delivery?
 - Yes: Why and how?
 - No: Why not?

Group exercises:

1. There is a range of qualifications which tutors should possess in order to indicate that they are effective practitioners of careers advice. Point out at least five of their qualifications and find two or three indicators for each of them (How could the qualifications be assessed?). After that please weight the qualifications according to priority (from your point of view).
2. Why are continuous efforts undertaken in continuous educational training, both in professional and pedagogical qualification, necessary?
3. Is the ability to establish a positive working environment/relationship a very important or less important skill of a tutor from your point of you? Argue your opinion.
4. Why is the part of the tutor as a role model so important? Discuss the most important aspects.

5.4. Domain 4: Materials & Infrastructure

5.4.1. Training Materials

5.4.1.1. Theory Content

The training material is a paramount tool in sustaining the action implemented at the training measure; therefore, attention should be paid, and care should be taken, when considering it as a supplementary and helpful didactic instrument.⁸³

Purposes of handing out materials

When implementing training courses there are several purposes for handing out material to the participants: It is supposed to support and facilitate the in-room learning experience making graphs and images to illustrate the subject being taught, to offer practical tools to increase the understanding of the matter, to give a chance to deepen and verify the

⁸³ See: Bundesanstalt für Arbeit: Anforderungskatalog an Bildungsträger und Maßnahmen der beruflichen Weiterbildung, p. 7, in: Balli, Christel/Harke, Dietrich/Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn.

knowledge at the end of the training, to offer an opportunity to make familiar with different perspectives and opinions, to make available a structured synthesis of what has been taught, to collect all written and spoken material which has been produced and shared during the training programme, to represent different learning tools used during training, to give the tutors a chance to revise and brush up the training topics long after the course ended, to give a chance to keep track for those who might have lost one or part of the encounters. Since the didactic material meets these needs it has to be considered as a proper and specific part of the training itself and therefore should be prepared thoroughly.

Training material selection

The selection of training material and methodology is discussed by the course coordinator and the tutors of each course. During a course regular tutor meetings are held to discuss amendments, problems a.s.o.⁸⁴

Which aspects must be taken into consideration when composing the training material?

To be effective and useful the material should be focussed on the objectives of the training programme, should be adapted to the specific target group to which it is addressed, should be simple and easily assimilated but stimulating and thought provoking, ordered and possibly provide a summary of the training programme. Tutors should highlight that the material is a tool facilitating the teaching and learning processes, using them to make learning easier, clearer, coherent with the activities, logical and eventually proportional as far as the topics and training term is concerned.

- *With regard to the training goals* the didactic tools should be coherent and (self) explanatory, adapted to the topic, linked with the training philosophy, be diversified, complementary and progressive, not repetitive or redundant. As well as this they should integrate less relevant parts which can not be taken into consideration at the in-room activities.
- *With regard to the target group*, the material should be appropriate as far as the age, gender, number of participants, language, learning capacities, personal and professional skills (reading and writing skills), background knowledge level and previous training experience is concerned.
- *With regard to the training institution* the training material should be affordable, feasible, easy-filed to enable the agency to build up an archive of all the material delivered and keep track and history of what has been offered through time. This archive can effectively be used for further training programs giving tutors a chance to use past shared material (up-to-dated where appropriate). This aspect brings up an issue of material's copyright: any material belonging to another author (other than a tutor) which is taken, copied or re-produced should be properly referenced (if needed) and adequately quoted. Didactic material originally created by the tutor "ad hoc" for

⁸⁴ See: Foster, Helga/Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, Berlin und Bonn, p.28.

the specific program belongs to the author and can be used by the training institution only after permission is issued, the institution however can store and archive the data.

When should the training material be prepared?

It is suggested that the training material should be prepared in well in advance by the tutor and, at least tested by the target group and the referent personnel of the institution to verify its intelligibility. However, the tutor should have an opportunity to make up and deliver newly prepared and found material “in progress” with respect to any new and unpredicted issues which might come up during training. This should also hold for the students (as the tutor finds appropriate): the students should be encouraged to bring material which they consider meaningful as part of the iterative development of the programme as this is useful also for students method stimulates and motivation.

Didactic material should be chosen and thoughtfully prepared since each course has distinct goals and target groups.

Types of course materials

Possible course materials which can be delivered in training measures are: course syllabi, course handouts, course packages, course lesson plans, class participation guidelines, training activity instructions and leaflets, name tags, midcourse feedback, instruments, tests/quizzes, individual assignments, group assignments, charts, theoretical models, journal prompts, problem sets, reading lists/reading prompts, duplicated notes, books, bibliographies, “webliographies”, transcription of classroom charts, tutorials, transparencies/slides, power point presentation, software, floppy disks, CD’s, DVD’s, and background material used for individual work and group activities⁸⁵.

The materials are of different types and very diversified, some are paper, some visual, some of them should be PC-supported. It is considered appropriate to give the participants a folder or binder to collect and file all the material disseminated during the course. In the case where the used tool is a visual one (on-wall presentation or chart) it is good practice to provide paper copies so that the participant can file it.

In order to promote note taking it is advisable to give participants clipboards and pens.

Safe keeping of the participant’s materials

Since some of the delivered material is needed throughout the training programme, which may be over an extended period of time, it can be a good idea to allocate a place where the participants can temporarily deposit their own material (or binder) avoiding the risk necessary learning materials being left at home.

Amount of the training material

The amount of training material should be appropriate and proportional to the course term and goals; it shouldn’t be too little and therefore not able to support the class and out of class experience properly ; it shouldn’t be too large either which may give the sense that the training has been delegated to the handouts forcing the participants to learn just through the material (having to devote extensive time to assimilate it).

⁸⁵ According to the type of training glue, tape, paper, thin card, cloths, can be of use and help.

Course material can be delivered at different times

The time chosen to use learning materials will be chosen according to the learning goals, the class dynamics and the purposes of the material itself.

- Some training materials can be given out right **at the beginning of the course**, sometimes it may be appropriate that they should be given out before the start of the classes (i.e. at registration). This may be so especially for the course outlines, lesson plans, participation guidelines which are supposed to give all the necessary information about the program, institution, logistics, procedures and conditions which make the attendance easy and productive. Name tags are necessary at this point. Readers as well as text books which are required before each meeting should be delivered before the course starts, thus ensuring that the participants are able to plan their out-of-classroom activities and responsibilities in order to prepare for the training.
- Other materials should be used **during the training** in line with the course topics and at the most appropriate time. Individual and group assignments, slides and power point presentations, test and summary charts should be handed out at the very point that they are needed. In case some of the materials might be used directly by the tutors (quizzes, questionnaires), so it is a good idea for the tutors themselves to have a copy of them.
- The final portion of material can be delivered **at the end of the training**, during the last class. This is typically true for training materials which are not needed to convey information, knowledge and competencies, but indeed to enable the participants to follow up and review the learning experience, to motivate self development and to increase and deepen their understanding and practice beyond the course itself.

The timing of the material provision has its own goals and effectiveness; the wrong choice of timing in sharing specific materials may end up not only in thwarting the material itself, but can also hinder the training process reducing the participants' motivation, understanding and learning. Thus even the times of the material have to be carefully planned and implemented in line with the training programme and the participants' needs.

Materials have to be presented and explained to the participants

It is of great importance that each type of material and handout used should be presented and explained to the participants both in its contents and its purposes in order to maximise its efficiency and appropriately support the training experience. The tutor should carefully check the material is complete in all its parts as well as that it is fully understood by the participants.

Special attention should be paid to on-line training material which participants can refer to once they're out of the classroom. Tutors should explain and show the students how to use this: web access, its use and how to download the material from personal computers. The tutor should be certain that every student has the chance to access PCs, that they are able to source and access delivered on-line material. On-line material cannot be run without passwords which should be timely provided in a timely fashion.

Final check:⁸⁶

- The training materials should be up-to-date.
- The materials should enable the participants to practice their own competencies.
- Documents should reflect the goals of the measure and its objectives.
- The training material should be selected according to the course content and training methods.
- The materials should reflect the specific target groups. If there are basic skills participants or disadvantaged people on the course, the institution should provide suitable documents for them (e.g. Braille-texts for blind people). One of the agreed objectives of vocational training institutions is to achieve equitable outcomes for disadvantaged groups. It is also necessary to consider the different knowledge levels of the participants and gender issues when composing the documents.

Possible questions for the production of the training materials could be:

- Do the documents reflect the language knowledge of the participants in an appropriate manner (According to their reading and writing levels)?
- Will there be participants with substantial deficits in the prevailing national language? Is it necessary to draw up the documents in a foreign language, like Turkish, Serbo-Croatian?
- Are the documents free from old-fashioned gender roles? Etc.
- The different learning approaches of participants (e.g. oral, visual, learning types) and the importance of application and practice are an important aspect of learning which is met by the chosen learning methods, training materials and learning devices.
- The materials should support the integration of the participant's experience, competencies, social and cultural backgrounds.
- The course materials should be of simple design, written in plain language, should contain no foreign words, no jargon and no abbreviations.

5.4.1.2. Exercises**Individual exercises:**

1. Remember the last training course (orientation course) you have attended. Point out and describe the course/didactic material provided to the participants. Critically name the advantages and disadvantages of the given material and argue your point of view. Your evaluation shall be based on target group, training contents, training

⁸⁶ Foster, Helga/Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, Berlin und Bonn, p.27.

methodology, learning effectiveness, motivation, achievement of knowledge and competency.

Group exercises:

1. The following list presents possible course material and handouts. With regard to every item listed give your comments on when it is delivered/used in the best way: before the training starts, at the very beginning, during the program, at the very end of the training. Specify for which content, methodology, target group your opinion is applicable:

course syllabi	case studies
course handouts	reading lists/reading prompts
course packets	duplicated notes
course lesson plans	books/editorial texts
class participation guidelines	bibliographies/"webliographies"
training facilities instructions and leaflets	transcription of classroom charts
name tags	tutorials
midcourse feedback	transparencies/slides
instruments	power point presentation
tests/quizzes	software
individual assignments	floppy disks, CD's, DVD's
group assignments	spupport material
charts	theoretical models
journal extracts	

5.4.2. Infrastructure

5.4.2.1. Theory Content

The environment in which a training programme takes place, as well as, the equipment which enables and facilitates the transmission of knowledge and competencies, are significant in terms of working climate⁸⁷, people's wellness and health, concentration level, satisfaction of learning needs and professionalism. Therefore infrastructure significantly influences the quality of the training intervention and its effectiveness.

1. Provision and accessibility of the training institution

Training institutions should take care to locate appropriate facilities in transport friendly locations; in town premises these should be easily reached – both by public transports as well as by private cars.⁸⁸ If reaching the facility presents a problem the institution should be able

⁸⁷ The infrastructure of a training institution contributes to the motivation of the participants.

⁸⁸ See: Bundesanstalt für Arbeit: Anforderungskatalog an Bildungsträger und Maßnahmen der beruflichen Weiterbildung, p. 10, in: Balli, Christel/Harke, Dietrich/Ramlow, Elke (2000): Vom AFG zum SGB III:

to arrange a shuttle service connecting the closest and most used public transport service. As much as possible training courses should be held in institutions which are easy to reach within a reasonable amount of time, commuting or driving long distances may affect the concentration of the participants resulting in fatigue.

At the entrance of the premises it should be clearly shown *when* and *where* the training is going to take place, thus enabling all the participants to reach the training room directly and easily; the associated facilities (such as WC, locker room, telephones, internet point, coffee room/machine, etc.) should be clearly indicated. In case of the lack of the abovementioned signage the location should be available through a designated person at an information desk; in any case the centre staff should have been previously informed of the training and the basic information needs to be available in case anyone needs help.

For participants with special needs facilities should be available and provided to meet their needs (e.g. elevators for wheelchair-users, marks on the floors for blind people, etc.). They should be able to move around and use the premises without any undue inconvenience.⁸⁹

2. The training classroom

There are no set types rooms for training: Rooms should be chosen by tutors and the training institution according to the different target groups, the number of participants, the training methodology⁹⁰, and the time of the intervention⁹¹. In fact there is a direct correlation between learning and the training environment during the course. This includes: level of comfort, ergonomics, safety, health, sense of belonging, impact on self image, levels of performance and recognition.⁹²

The **space and its design** should reflect the ethos of the course; the room(s) should be suitable and coherent with the training methods and the training activities, adequate for the number of participants⁹³, flexible⁹⁴, aesthetically agreeable⁹⁵, ordered⁹⁶, modern, comfortable⁹⁷ and safe⁹⁸.

Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn.

⁸⁹ See: Foster, Helga/Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, Berlin und Bonn, p. 19.

⁹⁰ Brainstorming, business game, individual interview, conference, congress, convention, in basket game, T-group, laboratory training, meeting, role playing, seminar, symposium, workshop, panel.

⁹¹ Part time training, residential training, full immersion training.

⁹² See: Bundesinstitut für Berufsbildung (1996): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geförderten Weiterbildung, Anlag 4a, in: Balli, Christel/Harke, Dietrich/Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, p. 9.

⁹³ With particular regard to their number, gender, age, professional role.

⁹⁴ A room should be modified slightly in progress for possible training needs (i.e. chairs and tables should be transferable, some of the furniture should be moveable, the lights and supplies should be changeable).

⁹⁵ Nice and beautiful rooms increase motivation, interaction and performance.

⁹⁶ Order tells people about professionalism of the institution and of the trainer, about preciseness and respect for the participants.

⁹⁷ Comfort is assured by technical tools, control over air, light and heat systems, chairs and tables, absence of external noise.

⁹⁸ Safety is assured by the dimension of the room, access and exit doors, furniture, lack of obstacles and slopes, slippery pavement, hygiene, maintenance, appliances, no inflammable furnishings, etc.

The **seats and tables** should be as ergonomic as possible to prevent fatigue, physical pain, danger; they should be movable or adjustable according to specific training needs, they should be modular, slip proof or certified to approved standards.

Seating arrangements should be considered as part of the training method since this increases and allows interaction between the tutor and the participants, as well as, amongst the participants themselves. A common and known pattern is the *school room layout in lines and rows* with all the participants facing the tutor; further patterns are: the *auditorium/amphitheatre layout* where all participants sit in semi-circular rows all facing the tutor; the *U - horseshoe lay out* with the participants facing each other and the tutor; the *circular placement* and the *rectangular placement*⁹⁹ (where the tutor sits in the circle/rectangle).

Each pattern is chosen taking into account the following factors: number of participants, desired social interaction and communication among the participants and with the tutor, the mobility of the participants and tutor, visibility, control over the participants by the tutor, length of the course session, use of other facilities and equipment.

As to the layout, the **seating positions** are significant as they influence motivation, attention and performance of the participants. The participants should be able to choose place on their own (no fixed and standard positions should be dictated, not even from one session to the other), they should decide next to whom they want to seat and in which part of the room. External or authoritative decision regarding seating position can be perceived as controlling and judgemental towards the audience.

Acoustic insulation is very important. Vocational training is most effective when held in a quiet room. People are able to concentrate better when there is no intrusive noise. Hence, it is recommended that the vocational training institution provides quiet working conditions. The classroom secluded from external interference to ensure that the room acoustics provides good communication and understanding among the participants. A good acoustic level is when everybody can hear each other clearly and without echo or noise. In order to reach this goal specific location and furniture should be carefully chosen. Sometimes noise is unavoidable, in such cases it is necessary to mediate against the noise as best one can¹⁰⁰.

Furthermore **good ventilation** is very important. People need fresh air in order for the optimum capacity to concentrate and work. Therefore the room needs an adequate number of external windows. If this is not the case, air conditioning and appropriate ventilation should be available. The recommended amount of fresh air is 35 m³ per head and per hour.¹⁰¹ Good ventilation conditions have to be carefully ensured within the training room with the attention paid to the microclimate to ensure wellbeing of the people sharing the space.

Also the **temperature** should appropriate to the needs of participants and tutors alike. In cold weather the optimal temperature is 19 to 25°C.¹⁰² The temperature and the purity of the air should be appropriate to the length of time people spend in an enclosed space¹⁰³. The level of activity – passive/active – will impact on the desirable temperature.

⁹⁹ All of these seating arrangements can be given with or without tables, or with small writing flaps.

¹⁰⁰ Building materials, carpets, tapestry, soundproof walls and pavements can be of great help.

¹⁰¹ See § 22 AschG and § 28 AstV, in: BMWA, Gestaltung von Arbeitsstätten, 2005.

¹⁰² See § 22 AschG and § 28 AstV, in: BMWA, Gestaltung von Arbeitsstätten, 2005, Page 18.

¹⁰³ Usually, what seems to be an agreeable temperature is not enough for participants who remain seated for long time (both in terms of cold and warm).

Finally, great care should be taken in the **lighting** of the training space which should provide optimum visibility and provide a pleasant environment. The room should take advantage of daylight as well as artificial light in order to ensure factors such as: intensity, direction, distribution avoiding dazzling and offering proper contrast and adequate yield of the colours. The tutors should be able to regulate the amount of light within the working room reducing it by means of screens and shades and increasing it through artificial lamps and dimmer switches; for this purpose all the switches for turning light on and off or for its adjustment should be within the room and easily accessible¹⁰⁴. The room should be equipped with additional and more intense lights for specific places such as the white board and the trainer's position. Furthermore the room should be equipped by blinds to darken the room if necessary.

The **colours of the walls** are important in terms of light and contrast; the colour should ensure an even spread of light, create proper contrasts so not to distract or to tire the participants, but also to avoid boredom and disengagement. In addition the walls should be free of pictures and posters. Free space on walls is necessary to put up posters and teaching aids for the specific course being run.

In specific cases and according to certain training methodologies one single room can not be enough. Besides the main, principal classroom, used for the plenary session, the trainer might need **other smaller rooms** to allow the participants to work privately in small groups. This enhances small group interaction and practical activities minimising the disturbance from other working groups on the same programme. These smaller rooms, which should provide the same general facilities as the main one, should be available at the same time, be easy-reachable and allow the tutor to follow split subgroups without walking long distances through the building. The availability and functionality of these rooms have to be planned in advance prior to the training start and checked each time before the session takes place.

3. Technical Facilities

Technical equipment and facilities are all training instruments and tools, therefore they are not optional for a training institution; they should be available to the tutors and participants according to the course needs.

A training infrastructure should be able to provide a wide range of technical equipment both on a general level (i.e. what is needed for generic types of training programmes) and on a specific level (i.e. training centres and professional schools coach with respect to particular technical areas which require specifically equipped laboratories and equipment).

The technical equipment should be up-to-date and comply with ergonomic and safety standards. Furthermore, the amount of technical equipment and machines must adequately reflect the numbers of participants.¹⁰⁵

Technical equipment needed for training programmes can be:¹⁰⁶

- *Audio technology:* microphone and loudspeakers, Tape - CD stereo sound system.

¹⁰⁴ A remote control can be of great utility.

¹⁰⁵ See: Foster, Helga/Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, Berlin und Bonn, p. 19.

¹⁰⁶ Some of the equipment work wireless, thus the remote control has to be considered part of the tool and be fully equipped with batteries.

- *Video technology:* video camera, digital camera, video recorder and player, DVD player, slide projector, transparency projector, video projector, camcorder, data projector/beamer, web cam.
- *Information and Communication Technology:* personal computer, lap top (with different kind of software), internet access, mail access, telephone, fax machine, video conference facility.
- *Other technology:* printer, Xerox copy, scanner, pin walls, flipcharts/white board, paper board, magnetic board with all the necessary markers.

Apart from the technical equipment (hardware) the training institutions should also provide the tutors with the **current software** (including the software licenses) at their disposal. Training institutions must be equipped with the current and most commonly used on-line tools, data bases on the labour market needs, learning software, application software (like office suites, graphic programmes, other software packages) as well as internet-access.

Tutors should be familiar with the handling of the appropriate technical tools and equipment and in case they are not, the organisation should provide specific information about the its functioning or, if possible, provide an appropriate technician.

All equipment should be in good conditions, therefore, regular and extraordinary maintenance to be undertaken¹⁰⁷; before each use equipment should be tested.

Besides the technical equipment, also all other fundamental materials should be provided. Tutors must be sure that necessary extra equipment is prepared and available for each session and in each training area. It is important to understand that the technical tools are the institution's responsibility, therefore staff member of the institution should be entitled to the supply of such materials: the provision of this equipment and fundamental materials should not be the tutor's concern, particularly in the case of external trainers, whose role is only to deliver training.

4. Other infrastructure facilities

Besides the classrooms other types of rooms should be provided by the institution to assure a comfortable and productive environment both for tutors and participants.

Social rooms for participants (coffee and tea kitchens) are necessary to stimulate "informal" contacts between participants during the measure period. Many aspects will be discussed between individual participants alone, not within the group and/or not with the tutors. Social rooms should, if possible, be separate for tutors and participants. They offer the opportunity to communicate beyond the classes in order to discuss, to rest, to enjoy some free time, to eat a snack, etc.; apart from this place a smoking zone should be available.

An area for individual counselling and guidance should also be prearranged for personal guidance, interviews and orientation sessions held by the tutors; this space should allow people to meet with course leaders and tutors, it should ensure privacy and be a safe place for the review of the participants' professional orientation.

¹⁰⁷ For regular maintenance and support a separate staff member (externally/internally employed) should be responsible for maintaining the equipment. Tutors should be able themselves to rely on it, that the existing technical equipment is operational ready with the beginning of the course and/or of the training session.

Retreat areas for tutors are of high importance. Taking into consideration the fact that a lot of training institutions have a high percentage of part-time and freelance trainers, a place and areas for “formal/informal” expertise and knowledge transfer should be allocated. A part from that, tutors need spaces for training preparation and material storage. Moreover freelance trainers should have an opportunity for training preparation within the training institutions they are working for. For all these purposes working rooms for trainers should be allocated which is set apart from the training area, as well as, from the social room for the participants.

The **toilets**, separated by gender, should be easily accessible, close to the training room and clean. A **wardrobe** or closet facility would give the participants the chance to leave coats and jackets as well as bags, which might not be necessary during the training, in a safe place.

In order to make lunch time as well as coffee breaks pleasant and not time-consuming and easily accessible, the institution should offer facilities within its own environment. A buffet service (catering or by means of a student’s restaurant), a bar/coffee room or other **refreshment facilities** such as a restaurant or buffet should be easy accessible, if not inside the institution, then outside of it.

It is recommended that the institution organises **child care** for participants and/or employees if necessary, e.g. by cooperation with a nursery.

A **library** which contains at least standard literature on the topics which are covered by the training and which is open both to participants and trainers should be offered by the institution. The library should also be a place where participants are able to undertake class preparation undisturbed.

Criteria for the selection and definition of good standard regarding institution facilities

The following general criteria should guide the training institution and tutors during the process of choosing the proper training environment while programming courses or training intervention. All of these areas should properly be addressed in order to ensure quality in provision and thereby laying the foundations for positive learning conditions.

- Safety: this covers all necessary precautions in order to prevent accidents and danger;
- Comfort (for both the participants and the trainer): this covers the ergonomics of all items which make the working/studying/learning environment comfortable. In particular with regard to the furniture, chairs, tables, working surfaces, the classroom dimensions, visibility.
- *Training room functionality: this covers all aspects which make the training space functional with regard to lighting, acoustics, microclimate, and technological/instrumental support.*
- Order: this refers to the cleanliness and the maintenance of the structure (rooms and other logistic services), the furniture and the equipment.
- Training compatibility: this refers to the layout of tutors and participants within the class room and all the relative precautions.

- Tutor's functionality: this covers the elements which can facilitate the tutor's activities and performance.
- Equipment and technology: this refers to the practical and functional availability of all the technical, instrumental and material supporting tools.
- Flexibility: provides for the possibility of varying the classroom order (see above) and structure as well as the capacity to offer varied solutions to different participants.
- Aesthetical harmony: this covers all the aspects related to the training which can make the environment and the activities aesthetically agreeable.

The equal and right balance of these different elements forms a quality foundation for an effective training environment and an enriched condition for efficient learning.

5.4.2.2. Exercises

Individual exercise:

1. Remember the last training course (orientation course) you have attended. Point out and describe the main logistics and infrastructures available practically used in the program. Critically express the advantages and disadvantages of the infrastructure and facilities and argument your answer. Your evaluation shall be based on the target group, training contents, training methodology, learning effectiveness, motivation, achievement of knowledge and competency.
2. If you were a tutor, which five most relevant infrastructural aspects would you consider necessary for training courses? Explain the reason why.

Group exercises:

1. Discuss and design an evaluation checklist to assess the quality standards of a training classroom.
2. Discuss and design an evaluation checklist to assess the quality standards of a training institution.
3. For each of the following seating patterns discuss the following aspects: target group, number of participants, communication/interaction between tutors and trainees, communication/interaction among trainees, teaching methods, teaching contents:
 - Rows and lines
 - Auditorium style
 - U-arrangement
 - Rectangular table
 - Round table
4. For each of the following training tools express and discuss the training utility and use as well as the functioning conditions:

microphone and loudspeakers	personal computer/lap top
Tape - CD stereo sound system	internet access/mail access
video camera	telephone
digital camera	fax machine
video recorder and player	video conference facility
DVD player	printer
slide projector	Xerox copy
transparency projector	Scanner
video projector	pin walls
camcorder	flipcharts/white board
data projector/beamer	paper board
web cam	magnetic board

5.5. Domain 5: Quality Assurance Measures on the System Level

5.5.1. Quality Systems of the Training Institutions

5.5.1.1. Theory content

“Quality management system” – any system providing guidelines and instruments aimed at measuring the success and improvement of a training institution. To ensure overall quality, both the individual (personnel, trainers, participants etc.) and organisational levels shall be taken into account.

QM concepts of the training institution

There are several QM-system models and frameworks available for service- (and therefore training) institutions. Among them are:

- Certificates on the basis of DIN EN ISO 9000ff¹⁰⁸
- The EFQM-Model, as well as
- AQW (based on DIN EN ISO 9001:2000, covering more services than 9000)

¹⁰⁸ The specific quality management systems of the DIN EN ISO were developed by and for highly industrialized engineering companies. The process of adapting these tools to the needs of service oriented institutions is still underway.

- Several national certificates based on quality-seal-models for service organisations (certifications as well as communities-of-practice).
- Specific certification services for providers of educational services, like EDUQUA (Switzerland)

Certifications provide a framework that makes it easier to compare quality requirements and standards. Although the implementation of quality standards does not necessarily guarantee quality “for real”, quality standards are able to serve as an “ideal” model to which participants aspire.

In order to improve the quality of a training institution it is not necessary to strive towards a quality certificate, but the quality models behind certified systems could serve as guidelines for the quality strategy of the institution.¹⁰⁹

Mission statement, philosophy of the training institution and the training program

The development and implementation of the vision and mission statements usually serves as basis for a more detailed quality approach. The vision statement pictures the organisation through a projection over the next 5 – 10 years, defining realistic and reachable but quite long-term goals.

The mission statement is used to describe the uniqueness of the organisation (what distinguishes it from other organisations with similar goals), its specific “life purpose” and (not always, but often) its significance as far as the society on the whole is concerned.

The mission statements of training organisations usually emphasise the particular services rendered by the institution. Since service-oriented organisations depend strongly on satisfied customers they focus a lot of attention to client satisfaction. Additionally, they put an emphasis on the right balance between the interests of the client organisations (contractors of training) and the clients (the participants, trainees) themselves.

The QM-oriented mission statements should (amongst other things) cover the following subjects:

- The organisation’s fundamental understanding of vocational guidance and training
- The organisation’s approach with respect to (sometimes conflicting) interests of participants and client organisations
- The organisation’s basic understanding of quality and its implementation

Organisational structure

The responsibilities within the institution must be clear and transparent. They shall be presented in the form of an organisational chart.¹¹⁰

¹⁰⁹ See also: Beywl, Wolfgang / Geiter, Christiane (1996): Evaluation – Controlling – Qualitätsmanagement in der betrieblichen Weiterbildung, Bielefeld, wbv Verlag, p. 53.

¹¹⁰ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 17.

Human resources potential of the institution

Based on the quality system requirements training institutions should regularly review the educational needs of their personnel regardless of whether they are employees or freelancers. Contractors/ training institutions are entitled to demand plans and the proof of implementation of continuous educational training from the training institutions, but not without taking responsibility for financing at least part of these activities.¹¹¹

Quality circles aimed at improvement of work on future projects

Training measures are often managed as recurrent projects. Unfortunately, project results often (at least in organisations without quality guidelines in place) don't get fed into the next project cycle. To ensure regular formation of these feedback loops they shall be firstly implemented as a part of a structured project phase approach. This means that the last work stage of every project or project cycle emphasizes a "lessons-learned" approach to ensure improvement of further projects.

This can either be done as part of a larger quality framework (like Total Quality Management – TQM) or simply by implementing project-related or even organisation-wide quality circles (QCs). QCs could be arranged on a regular basis to discuss general improvement measures for the organisation or the lessons learnt from a specific project.

Relevant quality domains and how to implement them

There are several models dividing quality measures into different domains. A classical approach to the quality of the training process is the so called "phase oriented concept".¹¹² This circular model defines the points of analysis in a training process as the following:

- analysis of the continuing educational needs of employees
- evaluation of the learning process
- evaluation of the learning outcome
- evaluation of the transfer of learned material to the workplace
- cost/efficiency analysis

While this approach can be helpful in evaluating the measure itself, it does not deal too much with quality on a systems level, which should include stakeholders outside of the actual learning process.

The following table describes possible quality domains, their forecasted outcome, quantitative indicators for success and possible data sources. In the process of the implementation of a quality management project these could be used as a framework

¹¹¹ Otherwise organisations without internal educational measures might win contracts due to cheaper labour costs.

¹¹² See: Beywl, Wolfgang / Geiter, Christiane (1996): Evaluation – Controlling – Qualitätsmanagement in der betrieblichen Weiterbildung, Bielefeld, wbv Verlag, p. 14.

quality domain ¹¹³	outcome	indicators	data source
Offers addressed to the relevant educational needs of the clients	Satisfied clients	Better employability of client	Client organisation, client questionnaires
Presentation of content and materials	Satisfied clients	Learning success and contentment	Material, client questionnaires
Sustainable learning success (return-on-investment) for the client	Satisfied clients	Better employability of client	Client organisation, client questionnaires
Balance clients and organisational needs	Satisfied client/organisation	Good relations with client organisation	Internal data, client organisation data
Effective management of human resources potential	Satisfied trainers	Overall rate of fluctuation; didactic, technical and methodical knowledge of trainers	Trainer questionnaires
Economically sound, efficient and successful performance of training	Satisfied owners	Based on a investment/ profit ratio	Internal data
Development of quality measures	All players	Successful implementation of quality measures	Documentation of quality system

Organisational questions

The training institution shall ask itself whether the institution is able or not to supply the necessary financial, personnel and further resources to make up an institutional quality management system covering all activities.¹¹⁴ For training institutions an elementary core range is fixed in the quality system conception. The following aspects should be taken into consideration in the quality system plan to cope with the expectable complexity of tasks:

- On part of the training institution all relevant people should be included in the quality management process from the very beginning. Therefore, the training institution shall include not only the freelance tutors but also the staff employees. The involvement procedure for tutors is to be outlined and disseminated before the beginning of the measure, in order to give the tutors an opportunity to make themselves familiar with all relevant aspects of the quality circle timely.
- The training institution shall guarantee that all of their tutors are appropriately qualified (description of the necessary professional suitability for the training measures and formal qualification of the tutors). The professional suitability and the formal

¹¹³ Partly taken from Burri, Thomas (2004): EduQua – Handbuch. Available at: www.eduqua.ch/pdf/eduqua_handbuch.pdf [27.06.2011], p. 12.

¹¹⁴ See: Orru, Andreas / Pfitzinger, Elmar (2005): AQW – Das Qualitätsmodell für Bildungsträger, Berlin, Beuth Verlag.

qualification must be examinable by the contracting body before the beginning of the course (proof of qualification).

- Furthermore the personnel recruitment shall be undertaken carefully (see 3.2.).
- The training institution shall provide the necessary infrastructure for the training measure (place and accessibility, available areas, rooms and their sizes, available technical equipment and facilities). The existing infrastructure shall comply with the requirements of the measure and must be available for inspection by the contracting body before beginning of the course (infrastructure proofs).

Institutions can outsource quality management services in differently configured procedures. For the provision of these outsourced services clear guidelines should be defined in both *qualitative* and *quantitative* regards. Contractors of these services commit themselves to put measures into practice with the help of the available resources: personnel and infrastructure.

5.5.1.2. Exercises

Individual exercises:

1. Name at least three quality domains leading to the clients' satisfaction with a certain vocational orientation course. What others come to your mind?
2. Name some aspects in dealing with the anticipated complexity of tasks to be covered by the quality system concept.

Group exercises:

1. Institutions can outsource quality management services. Discuss possible advantages and disadvantages of this procedure. Imagine yourself to be a manager of a training institution: would you outsource the quality management services? Argue your point of view.
2. There are several QM-system models and frameworks available for training institutions. Among them are DIN EN ISO 9000ff¹¹⁵, the EFQM-Model, as well as AQW (based on DIN EN ISO 9001:2000, covering more service than 9000) a.s.o. Which model is the most suitable? Provide your explanations on the matter in question.

¹¹⁵ The specific quality management systems of the DIN EN ISO were developed by and for highly industrialized engineering companies. The process of adapting these tools to fit the needs of service oriented institutions is still going on.

5.5.2. Analysis of the relevant internal and external key actors and their specific expectations

5.5.2.1. Theory Content

A various number of key actors and therefore a significant number of parties have tasks and interests that they pursue in the vocational training system. The role of all those actors in terms of responsibility and interests differs considerably. Each of them has a great impact on the vocational training system.¹¹⁶

Key actors and their responsibilities

The stakeholders and their responsibilities are as follows:

- External customers (contracting bodies): The customer who books a training course plays a very important role in quality establishment process. Firstly, the customer can require the training institution to implement quality measures as a part of the tender. Secondly, it can choose training institutions based on quality and sustainability rather than mainly on the cost factors. The customer is entitled to “set a standard” both for the quality of collaboration and the outcome of the institution’s training measures.
- Managerial staff of the training institution (other than tutors): These people are responsible for planning of the training courses, creation of its content and systems of its delivery (e.g. e-learning modules), responding to tenders, contacting and collaborating with customers, tutors and course participants, choosing and educating of the training staff and sometimes even choosing of participants. They are directly responsible for developing and implementing quality measures throughout their organisation and the training process.
- Tutors: Tutors are people who deliver the “product”. They are responsible for delivering (sometimes also producing) their assigned content in a timely fashion and adapting technical and pedagogic tools to the course content and clients. They are also (often) responsible (if not alone) for their own education and the quality measures of their immediate product (the training).
- Internal customers (clients) are people being trained. They also take much responsibility as the adult learning differs from classical class-room-based schooling insofar as it is always addressed to consenting adults. So it is in their responsibility to take part in the determination and implementation of the course content and complain if there are any problems.
- Social Partners: In a number of Member States of the European Union the social partners play a crucial role in the vocational training sector. They are part of the Advisory Boards as far as the reforms and other changes within the vocational training

¹¹⁶ See: Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Education and Training. Interim Report of the European Forum, p. 19. Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [27.06.2011]

system are concerned.¹¹⁷ Other Member States have more centralised decision-making processes.

According to the European Centre for the Development of Vocational Training (Cedefop) one common element of all quality approaches, although implemented to varying extents, is identification of the key actors of each level and definition of their role in the vocational training system.¹¹⁸ A quality oriented approach shall include all stakeholders of the training process by trying to build a “learning life-cycle” process.

It should be noted that the possibly differing views on vocational training is the root cause of many “dilemmas” regarding quality in the vocational training system

The expectations of key actors

Expectations of course participants:¹¹⁹

A. Each citizen is in the centre expects:

- Independence – free choice;
- Impartiality – taking an unbiased view;
- Confidentiality – protection of private information;
- Equal possibilities – for learning and work of all;
- Holistic approach – taking into consideration the personal, social, cultural and economic context in making decisions by each citizen.

B. Possibility of citizens for:

- Acquisition of competences – for choice management and planning;
- Active involvement – of the individual in partnership with all other actors in the process of guidance.

C. Access:

- Transparency of services – visible to the individual;
- Friendly attitude and empathy – provision of confidence;
- Continuity – of service during learning, work, of social and personal changes;
- Availability – of service at any point in the individual’s time at the centre;
- Accessibility – personal contact, via phone, e-mail, at a convenient time and place;
- Satisfying the needs – a wide set of methods.

D. Quality of the service:

- Adequate methodology – methods in accordance with the objective;

¹¹⁷ See: Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Education and Training. Interim Report of the European Forum, p. 17. (Developed in accordance with the Education and Training 2010 Work Program on Strengthening Policies, Systems and Practices in the field of Guidance throughout line in Europe.) . Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [27.06.2011]

¹¹⁸ See: Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Education and Training. Interim Report of the European Forum, p. 17. Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [27.06.2011]

¹¹⁹ See: 6.2.

- Continuous improvement – of the services in accordance with the objective;
- Right to express dissatisfaction – with the quality of the service;
- Competence of trainers – nationally accredited competences of the service providers.

Expectations of tutors: Tutors expect assurance of appropriate conditions for carrying out the training (sufficient space and possibility for transforming the space according to the demands of the methods used). In addition they expect employment contracts containing clear conditions.

Expectations of the contracting bodies/of the government: The expectations of the contracting bodies are focused on the contribution of vocational guidance in achieving the EU goals of economic development, labour market efficiency and occupational and geographical mobility by enhancing the efficiency of investment and vocational training, lifelong learning, human capital and workforce development.

“Effective guidance provisions play a key role to play in promoting social inclusion, social equity, gender equality and active citizenship by encouraging and supporting individuals’ participation in education and training and their choice of realistic and meaningful careers.”¹²⁰

In conclusion the different views of key actors shall be balanced and considered. Serious efforts should be taken to ensure that the training offered fits the expectations of various key actors.

Important tasks of the governments and contracting bodies

An important task of the governments and contracting bodies in the vocational training system is to overcome the following restrictions that are typical for the most European countries:

- Lack of coordination among the programmes;
- Services are mostly provided to the students through the high schools and to the unemployed, while the other target groups are neglected. The philosophy of “career guidance” is not developed sufficiently well as there is no relation with long-term learning.
- Insufficient participation of other key actors. Most services are implemented by the state services. There is almost no “guidance on the job” on the part of enterprises or trade unions (generally, they show low interest – do not perceive it as their task). Limited spirit of partnership;
- Insufficient resources;
- Lack of personnel or insufficient qualification level of personnel;
- Lack of relevant mechanisms of quality assurance;
- Insufficient coordination of vocational guidance services within a single country;

¹²⁰ Resolution of the Council of the European Union on Strengthening Policies (28 May 2004), Systems and Practices in the field of Guidance throughout life in Europe, Brüssel. Available at: http://ue.eu.int/ueDocs/cms_Data/docs/pressData/en/educ/80643.pdf [27.06.2011]

- Focusing on the immediate decisions (static approach) and not on the development (dynamic approach);
- Underestimation of individual guidance and counseling;
- The service is not provided to those who need it most.¹²¹

5.5.2.2. Exercises

Individual exercises:

1. Please describe the relation between the labour market demand and supply of training in vocational guidance.
2. Imagine yourself a tutor in a vocational guidance measure. Analyse the trainees' expectations and try to outline your strategy of communication with the group.

Group exercises:

1. Discuss the restrictions that are typical in vocational training systems in most the European countries.
2. Develop for each restriction (described in module 5.2.) a possible strategy for finding a solution and provide your arguments.

5.5.3. Exchange and communication between different actors during planning and implementation

5.5.3.1. Theory Content

Establishment of a strong and well-coordinated communication system between all actors at all stages of preparation and carrying out forms the basis for the working environment. It encourages team spirit, learning environment and assures equal opportunities and high quality of the service.¹²²

Theory of communications

According to the theory of communications¹²³ communication is exchange of facts, ideas, points of view among people by means of words, letters or symbols. The types of communication are: direct (personal or via telephone) and indirect (letter, fax, e-mail, electronic data exchange). The communication process contains:

- The emergence of the idea;

¹²¹ Resolution of the Council of the European Union on Strengthening Policies (28 May 2004), Systems and Practices in the field of Guidance throughout life in Europe, Brüssel. Available at: http://ue.eu.int/ueDocs/cms_Data/docs/pressData/en/educ/80643.pdf [27.06.2011]

¹²² See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 17.

¹²³ See: Habermas, Jürgen (1981): Theorie des kommunikativen Handelns, Frankfurt am Main, Suhrkamp. / Luhmann, Niklas (1986): The autopoiesis of social systems, in: Felix Geyer and Johannes van der Zouwen (eds.), Sociocybernetic Paradoxes, Sage Publications, London, pp. 172-192.

- The transformation of the idea into words and digits;
- The obtaining (visually, verbally) of the information by the recipient;
- The transformation of what was seen (heard) into thoughts;
- The confirmation of the communication received;
- Feedback analysis.

The principles of communication are: responsibility, efficiency and maintaining the organisation's image.

The development and implementation of communicational strategies

The development and implementation of strategies for internal and external communication are specific tasks of management.¹²⁴ Being a part of the information policy the strategies have to reflect the mission statement and the values of the institution. Internal and external communication as well as the information technologies used must meet the goals of the institution and the requirements and needs of its environment. The methods of communication mainly depend on , amongst other things, the purpose of communication, the size of the training institution and the specific organisational culture. For instance "unconventional" methods such as flyers are used for target groups which are not easy to deal with.

Communications of different actors during planning and implementation

At all stages of planning, implementation and evaluation of the vocational guidance measures there should be regular and efficient communication between the contracting body, the vocational training provider (training institution) and the trainers, as well as, the participants shall be effected.

Communication between the contracting body and the vocational training provider:

Communication between the contracting body and the vocational training provider plays a crucial role. The contracting body and the training organisation should reach an agreement with respect to the objectives, understanding that the vocational guidance measures should be efficient and are to be carried out in a timely fashion and with a properly chosen group of people in order to be effective. The objectives which should be well defined and coordinated between the contracting body and the training organisation provide a good starting point for strategy and planning and a clear starting point for evaluation.

Communication between the contracting body, the vocational training provider and the target groups:

In addition, the specific objectives of the measure defined by the training institution should correspond to the participants' needs. At the planning stage of the implementation of each vocational guidance measure the contracting body and the training institution have to ask themselves a number of signification questions: What are the typical needs of the various target groups? Are their needs met at the present time? How are the vocational guidance measures have to be organised so that they satisfy efficiently a wider range of needs?

Furthermore, the program of carrying out the measures (didactics) and the dissemination materials should be developed in accordance with the level and needs of the participants taking into account their previous achievements and experience.

An efficient **feedback-loop** between the training institution, contracting body and the trainees must be implemented to continuously improve the work of training institutions. It is

¹²⁴ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 19.

more convenient and easier to evaluate of all stages of the measures implementation and, if necessary, to reverse the direction.

Communication between the contracting body, the vocational training provider and “society”:

The vocational training system covers both the needs of the individual person and those of the society, namely: the person who understands himself/herself better will make a more successful choice with regard to work which will be a prerequisite for increasing his/her efficiency coefficient for society.

During the preparation for carrying out the measure the following questions need to be answered:

- What does the measure contain? Selection of subjects and their structuring;
- Why and for what purpose is the measure to be carried out? Pedagogical and psychological aspects and their justification;
- How should the measure be carried out? Methods, styles, place and situation of carrying out.

Communication between the contracting body, the vocational training provider and staff including tutors): On the basis of the defined objectives and content of the planned measure the training institution shall identify the personnel resources, plan the procedures for recruiting qualified and competent tutors and coordinate them with the contracting body.

Personnel management at the training institution is often thought of as the method by which the manager recruits the necessary personnel, provides information, defines rights and responsibilities, gives instructions and manages performance. In actual fact, the main task of the personnel management is to manage the further development of the tutors and other staff, thereby paying particular attention to their strengths and weaknesses and their development needs. The competences of the employees have to be monitored (assessed periodically) and developed.

Communications between regional enterprises (or: labour market experts) and vocational training provider: In addition, efficient communication between regional enterprises (potential future employers of the trainees) and vocational training providers are of great importance for efficient planning of the vocational guidance. As opposed to the generally accepted position, most of the enterprises do neither know their needs in quantitative form nor the benefit of some skills that will become necessary for them. On their part, the trainers being isolated in the training institutions have an incorrect idea of the essential needs of the enterprises. Uniting their efforts, however, the training institutions and the enterprises can utilise their experiences and work out adequate vocational guidance measures. Taking into consideration the fact that vocational training aims at the increase of individual knowledge and professional maturity, tutors are advised to be well informed of the requirements of the labor market in order to be able to help the participants to develop the most suitable career plans.

Communication between the training institution and the trainers: Systematic and regular communications between the training institution and the tutors is aimed at providing smooth running of the vocational guidance measure. Planning, implementation and evaluation should be performed systematically, the necessary changes should be announced to all actors in due time. Actually, tutors are expected to be both creators of programmes and leaders in their implementation of the vocational guidance measure. To be able to cope with these versatile responsibilities, their knowledge and skills have to be developed. The tutors often have gaps in theory or practice. The preparation they undertake during work can help them to deepen

their knowledge and skills and provide an opportunity to keep pace with the defined objectives of the measure.

Furthermore, all employees (tutors, consultants and other employees) shall be informed of their tasks, powers and obligations in due time. It is appropriate to provide for tutors a relatively free hand as well as a high level of responsibility for everything related to the programme.

The training institution is responsible for balancing the needs of the institution and its tutorial team. The performance of the individual activities has to be tracked and evaluated and the results have to be used for determining the future plans.

It is necessary to establish a culture of cooperation, sharing knowledge and mutual understanding between the tutors and their institution. On the basis of the requirements set forth by eduQua und LQW, the following aspects were summarised in relation to priority within the framework of the project¹²⁵:

- Presence of people to turn to, e.g. people responsible for the measure or the department
- Training body / tutors communication and feedback structures
- Team meetings of tutors of different courses (covering contents, methodological and didactic themes, participants)
- Availability of support and supervision (case-related or thematic)

Formal and informal communication

A distinction shall be made between formal and informal communications. Formal communication implies that a record is kept, that what has been said or written can be attributed to its originator. In informal communication no formal channels are used.

For each type of communication the possibility of a two-way flow of information, immediate feedback, exchange of information, opinions and ideas is important.

Should communication be formal?¹²⁶

- Formal communication is easier to enforce, monitor and improve.
- The institutionalisation of communications by the implementation of formal communication channels may encourage the assignment of a positive value to the communication within the enterprise culture, thereby encouraging people to communicate.

¹²⁵ See: Hausegger, Gertrude / Bohrn, Alexandra (2006): Quality in labour market policy training measures. Tutors' work situations as relevant factor of the quality of the measures? Interim report, Module 3: Learning procurement system – labour market policy services, Wien, p. 18. Available at: http://www.prospect.at/docs/improve_zwischenbericht_juni06_de.pdf [27.06.2011]

¹²⁶ See: <http://projekte.fast.de/ADDE/Guidance/Decision/MicroDec/wp5-1.htm> [27.06.2011]

- Formal communication suits the formal and stable business processes better.
- Formal communications usually increase reliability and traceability.
- A strong vertical division of work requires formal communications up and down hierarchical levels of management.

Risks:¹²⁷

- With informal or unstable processes formal communications may produce a lack of flexibility in the processes and prevent the organisation from adapting to them or being flexible.
- Formal communication may hit some psychological barriers, and may be not used. In formal communication the actor capabilities must then be assessed and possibly improved.
- Formal communication may put constraints on actors increasing their efficiency; therefore the actors would have a negative attitude towards using them.

Why is informal communication important?

A system works through personalities. A person needs to talk to people on all levels face to face, not merely through formal channels. Informal communication forms human relationships. People will be more willing to listen and to send information to each other if they know each other on a first-name basis. Informal exchanges are necessary to give an organisation a human touch that can be sorely needed when establishing vocational training.

Documentation is as important as communication

Though continuous and effective communication is vital, it is one of the major problems for many training institutions.¹²⁸ The institution should make sure that the current communication is “working”. Documentation assures comprehensibility and transparency. The training institution should make sure that the current communication/documentation is available to all members, thus all procedures can be retraced.

5.5.3.2. Exercises**Individual exercises:**

1. Describe the process of communication between the training institution and the tutors when planning, implementing and evaluating the vocational guidance measure. How effective is this communication in your institution? Argument your opinion.
2. How can the training institution implement active measures to support the tutors during their participation in the vocational guidance measure? Make a brief review.

¹²⁷ <http://projekte.fast.de/ADDE/Guidance/Decision/MicroDec/wp5-1.htm> [27.06.2011]

¹²⁸ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A handbook, BIBB (ed.), Bonn, p.18.

Group exercises:

1. Discuss the advantages and disadvantages of formal and informal communications.
2. Imagine yourself to be a manager of a training institution. The last evaluation of your institution indicated that the communication culture of your institution is very bad. There are many misunderstandings, people have a negative attitude towards using formal communication channels and a two-flow-communication takes place seldom. How would you proceed to improve the communication culture in your institution? Discuss examples and work out a communication strategy.

5.6. Domain 6: Quality in the Course**5.6.1. Selection of course participants and their access to the course****5.6.1.1. Theory Content**

Target groups impact on the learning group on the whole and thus the course participants should be carefully selected.¹²⁹

Who selects the course participants?

There are various models that take into account the type of the training institution as well as the training. In the majority of cases the participants are nominated for training and the selection process is carried out based on the agreement between the contracting organisation and the training institution:

- If participants are nominated by, for example, the Public Employment Service (PES), job agencies, companies, etc. and the training institution has no opportunity to exert influence on the selection process it should collaborate with the nominating organisation to explain the necessity of setting selection criteria to the participants and assist in defining the selection criteria.¹³⁰
- If a training institution arranges the training on its own, the responsibility for the selection process is borne by training institution in question.

The methods and instruments of the selection process should be in line with the goals and the mission statement of the institution. The method to be used is determined based on the training profile, course term as well as the number of participants. The common methods are¹³¹ examination of the application letter and curriculum vitae, tests, interviews, work samples, assessment centres and so on. In many cases the methods are combined.

The point of responsibility for the participant selection and the participants' selection criteria should be clear and transparent to all parties involved. Which methods were used for the

¹²⁹ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 25.

¹³⁰ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 26.

¹³¹ http://www.lrga.de/desite/template.asp?name=deproducts_branchen_erw_bild [03.02.2011]

selection of the course participants? The training institution should check the profile of the participants to ensure that participants are appropriately placed on the course to assure the quality of the training provided.

Selection criteria

Participants should be selected based on the criteria as follows:¹³²

- Motivation of the participants: Why do they want to attend the course?
- Formal and informal qualifications (Important: Besides the formal qualifications the informal qualifications and skills should be considered.)
- Work history and previous life experiences
- Profile/personality of applicants

If the training access is unrestricted the general appropriateness of the participants and relevance of the course to the participants should be evident. In the case of the lack of the individual relevance the gaps should be identified. If possible the applicant should receive feedback. Applicants should also get recommendations with how to address the gaps in question. The recommendations should be aimed at the applicants' self-development.

If the participants are delegated to the training institution the selection criteria should be discussed by the contracting/nominating organisation and the training institution. Both parties should adhere to the defined criteria when "false" assignments or measures for intervention are to be taken. The purpose is to establish a basis/tool for participant selection which will make the process more objective. The measure is developed based on the information acquired when selecting and responding to participants.

When does the selection process take place?

The definition of the target group is considered during the entire planning and concept-building phase. The selection/access of the participants is guided therefore by the following questions:¹³³

- Is there a definition of the target group?
- Is the definition adapted to the measures (the measure to the definition), and unequivocal and clear for all?
- Do all important stakeholders¹³⁴ have a clear understanding with respect to which prerequisites are necessary for participation in the training? (Note: This is a very important point. Potential participants should, in particular, receive comprehensive information about the intended target group of each measure. If the participants are not nominated by the contracting body but recruited by the training institution, the information provided by the training institution serves as a social marketing

¹³² See: National Open College Network, <http://www.nocn.org.uk> [27.06.2011]

¹³³ See: Burri, Thomas (2004): EduQua - Handbuch – Information über das Verfahren, Anleitung zur Zertifizierung, Thalwil, p. 43. Available at: http://www.eduqua.ch/pdf/eduqua_handbuch.pdf [27.06.2011]

¹³⁴ Contracting body, training institution, trainers.

instrument. The information on the course requirements play a crucial role when acquiring potential course participants.)

The definition and selection of the target group play an important role throughout the course. Several aspects must be taken into consideration in order to figure out the target group both for tutors and participants:

The course aim and purpose determine to whom it is addressed. It should be clear to the participant and implies creation of an appropriate environment which will enable him/her to articulate his/ her own individual aims (see below).

The course idea must also be defined in a way that makes it possible to understand the measure on its own terms, i.e. that it is self explanatory, as well as the possible implications/benefits of undertaking the course are explicitly expressed to the participant and his/her.

Learning methods, pedagogic and methodology also have an impact on selection of participants.

Time must be clearly stated; where is there opportunity for individual adjustments to timing?

Formal prerequisites should be defined so that each participant can have an opportunity to judge himself/herself whether he/she is the right person for this course.

Informal prerequisites deal with appropriate conditions and prerequisites for each individual participant.

Training institution demands should be stated as clearly as possible, so that every single individual, as well as, the training institution may decide whether it is the right target group.

Participant's demands enable the participants to express their specific wishes and needs so that the tutor can estimate if the requirements of each individual participant can be met.

Follow up/revised strategy is applicable when any problems after the course start occur, and when the participant and/or training institution may find that the participant does not fit in to "the right target group".

To enhance the course quality it is advisable to pay attention to the homogeneity of the participants. The group homogeneity is maintained if the target group definition is clear for all relevant stakeholders and if the definition was also communicated in a clear and transparent way to the assigning authorities. In practice however the "bottoms on seats" principle often dominates in the process of assigning people to the measure. Participants are often assigned regardless of their prerequisites and needs. The problem with striving for homogeneity sometimes is that it counteracts the aim of equality of chances. On this account the "homogeneity of the participants" should have a water proof-tight argument to prevent discrimination.¹³⁵

A maximum of 25 trainees should be allowed per course. According to Bundesinstitut für Berufsbildung (BIBB) this group size is recognized the most effective.¹³⁶

¹³⁵ LIMPACT – Leitprojekte Informationen compact August 2/2000, Bundesinstitut für Berufsbildung (ed.), Bonn. http://www.bibb.de/dokumente/pdf/a12ptiaw_limpact02_2001.pdf [27.06.2011]

¹³⁶ See: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, wbv Verlag, p. 20.

5.6.1.2. Exercises

Individual exercises:

1. Imagine yourself the head of a training institution wanting to implement a certain kind of vocational training. How would you proceed? Reflect on the following questions.¹³⁷

Write the answers on a sheet of paper (in catchwords):

- What were your criteria for the selection of the participants?
 - Who must be involved in setting up the selection criteria?
 - What is your selection procedure?
 - Who takes part in the selection of participants?
 - What can be done if the participants do not meet the criteria you set up for the target group pertaining to the following aspects?
 - How could informally acquired skills be checked in your opinion? Are informal skills and qualification considered and checked by your institution?
2. Upon fulfilment of the individual exercise each person presents his/her answers at the session. After that a discussion should take place (reflection process).

Group exercises:

1. Discuss possible advantages and disadvantages of the selection process of participants. Argue your opinion!
2. Discuss which advantages and disadvantages homogeneous and heterogeneous/diverse groups could have! How does the composition of the target group influence the learning process?
3. Design a tool for the selection of participants fitting the aims of the specific course.

5.6.2. Individual Expectations and Learning Goals

5.6.2.1. Theory Content

Apart from the general learning agreements of the measures (general goals) specified for the whole measure, the individual learning objectives of every participant should be taken into account. The vocational training should not intend to force the overall goals upon participants but define learning objectives that result from cooperation of tutors with the participants, as well as, the companies and experts (see 5.2.). Research shows that vocational training in which the learning objectives have been set in cooperation with all the parties (e.g. target groups, trainers and experts) is the most effective.¹³⁸ Achievement of these objectives,

¹³⁷ Adapted from Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB(ed.), Bonn, p. 49-51.

¹³⁸ See: Cedefop- European Centre for the Development of Vocational Training (eds.) (2006): Vocational training in Europe, in : Cedefopinfo 1/2006, Luxembourg, p. 17. Available at: <http://www2.trainingvillage.gr/download/Cinfo/Cinfo12006/Cinfo12006EN.pdf> [29.06.2011]

within the framework of the overall goals of the labor market policy, should be one of the main aims of the measure.

These individual learning agreements, referred to as the “detailed specification” of the leading learning agreements of the overall measure, should be formulated in the context of individual coaching and counseling sessions. But according to Siebert¹³⁹ the learning objectives and expectations cannot “be prompted” from the participants in isolation. First of all the participants should be familiar with the measure, therefore, the training institution should ensure that participants are provided with comprehensive information before the measure starts. This plays a crucial role in the quality assurance process.

Information to the participants prior to course start

It is important for the institution to reach its potential participants and to ensure that they are well informed by means of appropriate information material. Any written material including internet sites should cover the following aspects:¹⁴⁰

- statements from the vocational training provider (legal form of the provider)
- overview of the training offers
- contract terms and conditions
- qualification or certificates to be granted to the participants after accomplishing the measure
- duration of the course (number of hours)
- expenses (books, public transport etc.)
- access restrictions, required formal qualifications and work experiences as well requirements set to potential participants by a certain training institution
- planned didactic methods
- tutors' qualification
- the destination of completing participants
- any information encouraging potential participants to contact the institution for further inquiries

The course participants should receive information in a number of ways. The potential sources of information for the participant to making the decision about joining a course are:

- written material
- advertisements
- informative meetings held by the training institution

¹³⁹ See: Siebert, Horst (2003): Didaktisches Handeln in der Erwachsenenbildung - Didaktik aus konstruktivistischer Sicht, München, Ziel-Zentrum F. Interdis, p. 97.

¹⁴⁰ See: Bundesinstitut für Berufsbildung (1999): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geforderten Weiterbildung, Anlage 4a, in: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geforderten Weiterbildung – Strukturen und Entwicklungen, Bonn, wbv Verlag, p. 8.

- Public Employment Service (PES)

The Public Employment Services is responsible for providing their customers with the training details. In addition individual consulting services should be undertaken. The aim of the consulting services offered by the Public Employment Service is to assure customer's vocational decision is based on the labour market needs. If the training provider offers measures on its own it should somehow encourage the customers to get into contact with the Public Employment Service. The consultation services offered by the Public Employment Service should be linked with the information provided by the training institution.¹⁴¹

Defining individual objectives and general goals

The objectives and goals of the participants should be defined based on individual needs. At the initial stage of the measure planning should be flexible, this is the only way to ensure that the derived individual goals can be taken into account. The original design may need to be reviewed.¹⁴²

The objectives of the measure should be clear in order for the participant to be able to identify her or his own formal and non-formal aims. An individual schedule can facilitate understanding of the participant's aims. The schedule (study plan) may be used throughout the course as an important work tool.

For instance:

Pedagogic field of interest: e.g. how to learn job application strategies.

Schedule: The name of the course, the name of the participant, date.

What do I want to do/learn?	How should I do/learn it?	Why should I do/learn it?	How should it be documented?

This method is efficient as every participant takes his/her time to express his/her mind and to determine the results to be achieved as well as the methods of their achievement and analyse the reasons for that.

Before making up an individual schedule the participant should have the opportunity to discuss it with a tutor to get a recommendation on structuring his/her (yet acquired) competence, his/her expectations, resources and interests.

¹⁴¹ See: Bundesinstitut für Berufsbildung (1999): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geforderten Weiterbildung, Anlage 4a, in: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, wbv Verlag, p. 16.

¹⁴² See: Gnahn, Dieter / Kuwan, Helmut (2004): Qualitätsentwicklung in der Weiterbildung – Effekte, Erfolgsbedingungen und Barrieren, in: Balli, Christel/Krekel, Elisabeth M./Sauter, Edgar (eds.)(2004): Qualitätsentwicklung in der Weiterbildung – Wo steht die Praxis?, Bonn, wbv Verlag, p. 41-59.

Defining the criteria to be met through the aim setting process may be really helpful for the participants in achievement of their goals, as well as, providing a clear and distinct framework for the documentation of the learning results.

The participant must articulate his/her aims so that they will be measurable, realistic, and concrete and have a time perspective. Sometimes these individual aims differ from the general aims and possibilities inherent in the course.

The formal aims, i.e. study results, and non-formal aims, i.e. factors and development of a more or less individual character should not be mixed. The general objective (the learning goals) serves as a template for all people involved.

*"This adjustment of the measure to the objectives has to be clearly recognisable. They determine the selection of contents, the procedure as well as the way of the progress control."*¹⁴³

What is more, carefully analysing expectations and motives in the target group helps to steer clear of unrealistic objectives.

*What are common client expectations?*¹⁴⁴

- Career consultant's activity models: According to the European Project "The impact of career consultants on students' expectations" the tutor consultant model may seem obvious as the most appropriate model. The needs and preferences of customers vary. Some people need to be directed, some seek information, and some need approval to realise their potential. A perfect tutor is the one who is able to function under each of these models adapting to the needs of each individual customer. This attitude related orientation of the tutor is fundamental to the practice of the centralised customer consulting. The tutor should not pressure people with regard to changing or taking a certain direction, but he/she should rather help the participants to explore their needs based on their own perspective and discover their own resources.
- Expectations of a tutor: These expectations can affect not only the outcome of the process but become crucial in making decisions with regard to using of the consultant's service. The way the tutor employs his/her own skills, adopting them to the expectations of an advice-seeker has a strong impact on the quality of vocational training and their efficiency. A properly conducted investigation and a correct "diagnosis" is the basis for action planning. In order to avoid the forming of incorrect ideas with regard to the actions of vocational tutors and to answer the question of "What vocational tutors do young people prefer?" extensive empirical research has been undertaken. Galasi et al. (1992)¹⁴⁵ asked the course participants to present their

¹⁴³ See: Burri, Thomas (2004): EduQua - Handbuch – Information über das Verfahren, Anleitung zur Zertifizierung, Thalwil, p. 44. Available at: http://www.eduqua.ch/pdf/eduqua_handbuch.pdf [29.06.2011]

¹⁴⁴ See: Paszkowska-Rogacz, Anna (2006): The impact of cultural differences on students' expectations from career counsellors, Łódź.

¹⁴⁵ See: Galasi, J.P. / Crace, R.K. / Martin, G.A. / James, R.M. / Wallace, R.L. (1992): Client Preferences and Anticipations in Career Counselling: A preliminary Investigation, Journal of Counselling Psychology, 39, 1, p. 46-55.

expectations with respect to the career consultant and vocational training.

Expectations were conceptualised as preferences and anticipations resulting in the following conclusions:

- customers have a fairly clear idea about what they expect (preferences) from vocational training and what the experience they want to get out of it;
- customers are less certain about what the vocational training experience will actually be like (anticipations) and less optimistic about it;
- a number of mismatches existed between customer's preferences and anticipations;
- few differences were evident between customers who have yet had the experience of being consulted and those who have not;

5.6.2.2. Exercises

Individual exercises:

1. Discuss and design an example for a personal study plan / an individual schedule.
2. Discuss and design an example of an information sheet for one course aiming at attracting participants to the course. Which statements should the paper include?

Group exercises:

1. Design a possible marketing concept on how to find the "right" participants? Which aspects shall be taken into consideration? How would you "promote" the training?
2. How would you like to do individual discussions with the participant aimed at clarification of his specific purposes? Make a template to be used.

5.6.3. Mediation of expectations and the course planned

5.6.3.1. Theory Content

A course curriculum for the measures should be developed, revised or adapted for each specific measure according to the needs of the target groups, as well as, the needs of the labour market, the goals set and the course expectations.

The courses are based on curricula including the following aspects:¹⁴⁶

- aim and purpose of the measure
- skills and knowledge to be acquired
- prerequisites and requirements (formal and informal)
- contents of learning (including personal and social competencies)

¹⁴⁶ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A handbook, BIBB (ed.), Bonn, p. 24.

- suggestions for the structure of learning processes (modules, materials, learning methods (pedagogy, methodology), assessments e.g.)

The course coordinator, tutors, potential course participants and experts should be involved in the “mediation process” in question. The curriculum should reflect the goals and values of the training institution. In addition the individual requirements and expectations should be integrated.

The curricula generally represent the expert knowledge. Sometimes participants have completely different work histories, educational background and life experiences and do not necessarily understand the logic of the subject a priori to starting. Besides in many cases they tend to pursue their individual objectives taking not into account other prospects (as far as the labour market conditions and the experience of other participants is concerned, etc.). However, it is actually crucial that the curriculum, its content, its topics and methods are strongly adapted to the participant’s expectations and needs. Acquiring learning competences and gaining the ability to take responsibility for their own learning process is the part of the curriculum in general. In this respect the tutor should discuss different approaches with the participants without changing the final objective which should be the successful placement of the participants in the labour market. This is a rather difficult task of transferring a participant orientation into an expert’s approach requiring a lot of working experiences in this field.

Mediation of expectations and planned course curriculum

The potential target groups are recommended to meet the coordinator and the tutors to learn the conditions of the training before the training starts. The meeting should be aimed at clarifying the contents of the course and identifying the expectations of *each party*. Participants should be encouraged to articulate their needs and expectations prior the training start. The aspects included in the curricula (mentioned above) should be made clear during the meeting.

For Tutors such meetings give the opportunity to revise the contents and the methodical-didactical concepts of the planned measure in order to meet expectations of all parties involved.

The following aspects are subject to consideration:

- What kinds of participants are expected to attend the course?
- How homogeneous or diverse is the group?
- What are the expected motivations of the participants?
- What are the participants backgrounds, skills or experiences that are expected?
- What course contents will conform to the expectations of the participants?
- In which content range can expectations not (fully) be considered?
- Which “measure experiences” do the individual participants already have?

Unfortunately meetings of the vocational training providers with potential target groups prior to the training take place only rarely as the time and budget of the actors and the training institution are often limited.

In this case participants and trainers should at least exchange their expectations with regard to the planned course contents during the first session of the training. The mediation of expectations and planned course contents plays an important role in the vocational training system. The participant should have the opportunity to express their expectations regarding the content/curriculum. If this is possible there is a good chance for a mutual acceptance and recognition and a successful beginning to the course.

Conflicting or changing learning goals?

Discovering individual expectations may reveal some of the learning goals which conflict with expectations with regarding the content. The trainer may realise that pursuing some of his/her goals or pursuing some of the institution's goals may conflict with the goals of the participants. This will probably mean that the tutors, jointly with the participants, will reconsider the priority he/she gives to the great value to.¹⁴⁷

Acceptance of the content by the participants

As far as the group is concerned it is important that both participants and training institution (tutors, coordinator) agree upon the framework and guidelines of the measure. This work is indeed a process in itself and it is important that the participant can realize the connection between the overall training situation and his/her actions in group situations. The curriculum should be fair and well-balanced. Furthermore, it is important that the curriculum should be flexible and adaptable in the case of contingencies or problems that might occur.¹⁴⁸

Objectives and contents¹⁴⁹

- The contents of measure should meet the needs of the labour market, needs and expectations (for the course) of the target group, the goals set forth by the labour market policy as well as those of the training institution.
- Only measures aimed at gaining advantages when “floating” in the labour market should be offered.
- The training institution is responsible for enabling participants to acquire the measure based relevant key qualifications by the participants.
- Besides the qualification the training should be aimed at advancement of the participants' social learning.
- The measure and its content should support transfer of the knowledge and skills gained. Participants must be supported in using the learned skills (in the course of the measure) in practice.

¹⁴⁷ See: Hartz, Stefanie / Meisel, Klaus (2006): Qualitätsmanagement. Studentexte für Erwachsenenbildung, Bielefeld, wbv Verlag, p. 109.

¹⁴⁸ <http://www.bibb.de/de/23734.htm> [29.06.2011]

¹⁴⁹ See: Bundesinstitut für Berufsbildung (1999): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geforderten Weiterbildung, Anlage 4a, in: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, wbv Verlag, p. 24-25.

- The conveyance of theoretical knowledge should take a quarter of the whole time period of measure at least (This requirement does not apply to a measure with a strong practical focus.).
- The contents should be kept flexible and open for contingencies.

5.6.3.2. Exercises

Individual exercises:

1. Define the main aspects on which the course curricula based.
2. Imagine yourself a tutor of a training institution (the last measure you attended) wanting to develop a course curriculum together with the participants. How would you proceed? Describe an ideal curriculum taking into account the following questions. Write the answers on a sheet of paper (in catchwords):
 - What is meant in your institution by “curriculum”?
 - Which parts does your curriculum consist of?
 - Is the curriculum developed within your institution?
 - Is the curriculum adjusted to a target group/ to the needs of the participants?
 - Who is involved in curriculum designing?
 - How often do you revise the curriculum? How would you proceed?

Group exercises:

1. How would you proceed if the learning of the institution is in significant contradiction with those of the tutors? Make a template on the methods to be used.
2. Discuss and design a concept assuring regular revision of the developed curriculum.

5.6.4. Learning Agreements between participants and tutors

5.6.4.1. Theory Content

Learning agreements between participants and tutors encourage a positive attitude towards learning. This attitude includes an active interest with respect to the subject matter and a cooperative relationship between tutors and participants.

“Participants are enabled to take responsibility for their own learning, to set their own goals and career planning. Each participant is encouraged and supported by the tutors to take up that active approach to learning, considering the individual’s position, expectations, motivation etc.).”¹⁵⁰

¹⁵⁰ See: Foster, Helga/Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, Berlin und Bonn, p. 28.

Learning agreements ensure, particularly in the adult education, that the participants can be taken seriously in their role as adults and are not falling back into student role. The more open communication between tutors and participants (see 6.3.), the more disappointments and possible dropouts can be avoided. Siebert¹⁵¹ speaks of a promotion of a *fitting process* between the “supplier (training institution) and consumer-perspective (participant)”.

“Contract” between participants and tutors

The basis of learning agreements is the selection of the course participants (see 6.1.), the identification of individual expectations and individual learning goals (see 6.2.) as well as the mediation of expectations and planned course contents (see 6.3.).

Divergences of opinions, if existing, are documented whereupon a joint action plan is established to avoid disagreements on the possible consequences. During the training there should be opportunities to revise the individual schedule (see 6.2.) and developed curriculum (see 6.3.). The training institution has to ensure there is enough flexibility and time for considering the participants’ attitudes and maturity. In this respect the tutor has to ensure that a safe environment is established, where participants may reveal their disadvantages and weaknesses in front of trainers and participants (via rules for communication).¹⁵²

The role of the tutor should be that of a facilitator, not an instructor.¹⁵³ It is crucial that participants are encouraged to propose their expectations and questions.¹⁵⁴

Within a vocational training system, all participants take responsibility for achieving their learning goals and for meeting their expectations. These learning goals (agreements) can be specific to individual courses and activities, or can be those guiding the entire training and training institution.

The following four core ideas are general to the vocational training process:¹⁵⁵

- Shared discovery and learning. Collaborative learning activities where participants share responsibility for the learning that takes place to help the learning community to develop. Rather than relying on traditional “expert centered” training formats, tutors should include collaborative learning techniques so that trainees can see their contribution to the learning goals (“client centered”).
- Functional connections among participants. Interactions between participants must be meaningful, functional and necessary for the accomplishment of the “work” within the courses or training and learning activities. Moreover, meaningful connections must extend throughout the entire training. This means tutors should

¹⁵¹ See: Siebert, Horst (2003): Didaktisches Handeln in der Erwachsenenbildung. Didaktik aus konstruktivistischer Sicht, München, p. 205

¹⁵² See: Balli, Christel/Harke, Dietrich/Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bielefeld, p.24-25.

¹⁵³ See: Foster, Helga/Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, Berlin und Bonn, p. 29.

¹⁵⁴ See: Siebert, Horst (2003): Didaktisches Handeln in der Erwachsenenbildung. Didaktik aus konstruktivistischer Sicht, München, p. 206

¹⁵⁵ See: <http://www.cirtl.net> [04.04.2005]

help participants to feel fully connected with learning opportunities beyond the course, make the impact on the learning experience explicit and evaluate the impact of these connections.

- Connection with other related learning and life experiences. Learning communities flourish when implicit and explicit connections are made to experiences and activities beyond the course or program in which one participates. These connections help situate one's learning in a larger context by solidifying one's place in the broader campus community of learners and life experiences. These connections decrease one's sense of curricular and personal isolation.
- Inclusive learning environment. Learning communities succeed when the diverse backgrounds and experiences of learners are welcomed in such a way that they help to inform the group's collective learning. Whenever possible, the activities should help participants to reach and connect with others from backgrounds different from their own.

The following framework has been developed as a standard for program developers/ instructors as they develop the learning goals and evaluation plans for their participants in their programmes. It is also meant to guide their own practice.¹⁵⁶

Conceptualization	Well developed understanding, systematic and ongoing action
Sharing discovery and learning promotes all participants to share responsibility for achieving the learning goals.	Tutor understands the value of collaborative learning, has the skills to implement, implements them, and intentionally evaluates these activities to improve his/her approach to enhance learning.
Interactions throughout the vocational training and among participants are functional and necessary for the learning goals to be accomplished.	Tutor understands the value of, and knows how to fully integrate functional interactions between participants necessary to achieve the learning goals, implements them, and has built in a plan to evaluate the effectiveness to improve their teaching and participant learning.
Implicit and explicit connections are made to other learning and life experiences.	Tutor helps participants feel fully connected with learning opportunities beyond the course, makes explicit the impact on the learning experience, and evaluates the impact of these connections.
Inclusive learning environment welcomes the participants' diverse backgrounds /experiences and is used to help	Tutor creates an environment where all course participants based on a variety of backgrounds rely on each other to achieve

¹⁵⁶ Adapted from the Center for the Integration of Research, Teaching and Learning, <http://www.cirtl.net/LCframework.pdf> [04.04.2005]

accomplish the group's collective learning.	the learning goals by recognising how the diversity of backgrounds enriched their learning. Tutor evaluates and makes changes based on how diversity enriches learning goals.
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According to Foster and Gutschow (1999) learning agreements should be developed by taking into consideration that participants can attain the following competencies, skills and attitudes:¹⁵⁷

- learn how to learn
- find and process information
- apply skills and knowledge
- cooperation and communication
- the utilisation of new technologies
- self-organisation (e.g. confront the ideal of multifunctional activity with the need to set priorities (for own advancement))
- awareness of domination and suppression within groups, also in learning situations
- accept mistakes as a necessary step towards advancement
- accept others person's opinions, e.g. within a group
- accept values of minorities
- facilitate active participation

5.6.4.2. Exercises

Individual exercises:

1. Review in your mind the last training course (vocational training) you attended. Point out and describe learning agreements which were developed (if any were developed).
2. If you were a tutor which do you feel are the five most important points relevant to learning agreements for vocational training courses and explain the reason why.
3. According to your point of view as a participant determine the five most important points relevant to learning agreements for vocational training courses and explain the reason why.
4. In conclusion compare your answers given in the second and third point. Discuss the results (see group exercises).

Group exercises:

1. Discuss and design a concept of learning agreements (at least eight) between tutors and participants. Carry out step-by-step analysis and evaluate advantages and

¹⁵⁷ See: Foster, Helga/Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, Berlin und Bonn, p. 29

disadvantages of each learning agreement and give the respective explanations of the reasons.

2. Discuss the main ideas of the vocational training process.
3. Discuss the role of a tutor in a vocational training.

5.6.5. Dropout Prevention

5.6.5.1. Theory Content

There are both personal and societal costs to 'dropping out'. Usually – if the dropout is not due to finding a new occupation - the participants will lose the right to claim unemployment payments. The societal costs of dropping out include the loss of taxes that make high dropout-rates an issue for every taxpayer.

The difference to measures of further educational trainings lies in sanctions on the part of the assigning authorities. Normally, in measures for further education, where participants decide to attend completely voluntarily, participants are entitled to dropout whenever they want. If they had to pay course fees, the participants will usually forfeit their money.

How big is the problem?

Calculating an accurate dropout rate is nearly impossible, since vocational training providers differ in their definitions of a dropout, their counting methods, and their methods of following a participant who drops out and re-enters, or those who leave the city or those who take up an employment.

In case of a premature course dropout Siebert¹⁵⁸ speaks of a special case of "disengagement". According to Siebert the fluctuation of the participants is also a way of dropping out, or the passive participation can be seen as "internal dropout".

Reasons for dropouts can be attributed to the following aspects:

Factors within the measure:

- Too large groups
- Meeting times are not fitting with everyday life routines
- Place of the training is difficult to reach by public transport.

Tutors and course objectives:

- Lack of new input
- Learning progress is perceived as too small

¹⁵⁸ Siebert, Horst (2003): Didaktisches Handeln in der Erwachsenenbildung - Didaktik aus konstruktivistischer Sicht, München, Ziel-Zentrum F. Interdis, p. 251.

- Relevance of learned contents is too small for the life accomplishment or for the desired occupation
- “Connection-learning” is not possible - the participants cannot link new contents with prior knowledge
- No positive social contact to the group and to the trainers

Load:

- External loads such as diseases, care and support obligations for families or other relatives.

Motivational factors¹⁵⁹:

- Information about the measure is insufficient
- Individual expectations are not in agreement with the institution's or tutor's goals
- Participation is primarily external motivated – the participation is arranged involuntarily
- The obtained knowledge/information remains outwardly

Social contact:

- Participants feel isolated in the group or the participants are put under pressure by others
- Tutors give no positive feedback and give no attention to the participants
- Participants are criticised at home because of their participation

What can be done to prevent 'Dropout'?

When a participant drops out of the training it is easy to blame the participant for his or her failures. While assigning blame for the “unsuccessful” participant (except those who drop out due to finding a new occupation) may feel good to the blamer, it doesn't address the most important problem: What can be done to prevent the participant from ‘dropping out’? There are a number of methods:

- **Focus on participant goals:** The participant has to identify what he or she wants to get from the training experience. The tutor should have the participant list training and personal barriers to reaching that goal. Sometimes talking about reaching a goal helps focusing efforts.
- **Encourage training involvement:** The tutor should encourage his or her participant to attend the vocational training regularly. This makes the participant feel part of the group, important to the training institution and more motivated to perform in order to participate. In addition, the tutor (or the training institution) has to guarantee that the participants feel comfortable at the institution and in the training itself. Participants

¹⁵⁹ Course participants with low motivation tend more likely to drop out of vocational programs than others.

must have something positive to look forward to. The participants should be able to meet their needs in the training setting.

- **Active Participation:** It must be guaranteed that participants obtain the possibility to participate actively by means of group work throughout the whole training measure. Active participation enhances the motivation of the participants and, above all, effective of learning.
- **Involvement of companies:** Career and vocational programmes have been shown to be more successful in keeping participants from dropping out if the training is highly interactive and actually involves relevant key actors such as tutors, participants and potential entrepreneurs in the processes of defining the goals and decision-making. In particular, the partnership between companies and the training institution is important in case of vocational training. If participants are matched with representatives ("mentors") from cooperating companies who volunteer to spend time with participants (e.g. in order to take participants to their companies to expose them to the world of work etc.), the chance that participants do not drop-out the course increases.
- **Consider alternative training settings:** The tutor should speak with the participant to figure out how the participant's goals can be reached. In the ideal case other career counsellors and further education providers should be consulted. The training institution has to identify ideas for alternative settings, if necessary. If adequate alternative settings are investigated, the tutor should support the participant in making the contacts, completing forms a.s.o.
- **Consider realistic goals:** The tutor should not get 'stuck' on the issue of the participant placing in the labour market. The more important questions are: "What does the participant find interesting?"; "What is the participant good at?"; and "Which of these skill areas is marketable?". If attending an educational institution is the way to reach the vocational goal, the tutor should foster the participant in setting steps in place to get there. If placing in the labour market is the "right" way to reach the individual goal, the tutor should support placement during the measure. This means: If the drop-out occurs as a result of "job finding" of a participant, the trainer should be flexible enough to foster placement during the measure.
- **Identify special needs:** The participant should determine if the participant might have a specific learning or behaviour problem interfering with successful placement or successful career (education) path. Low achievement, retention in grade and behavioural difficulties are highly predictive of dropping out of school. Assessment of possible learning and behaviour problems might help to identify special services to help your student find school more successful.

One of the main reasons for 'drop-out' is when the course programme fails to meet expectations of the participants (see motivational factors).¹⁶⁰

What possibilities exist to adapt the course programs in case it does not meet expectations of the participants?

If measures only get adapted after "wrong" outcomes this could promote a blame culture inside the organisation. Instead of this approach the organisation should use every outcome of monitoring and evaluation and feed this back into feedback-loop to constantly improve the quality and goal-conformity of the training measure (adaptation of all the measures as part of a continuing quality circle, see: domain 7).

Continuous improvement can be considered, in general, in relation to:¹⁶¹

- Improving external customer satisfaction
- Improving the quality of suppliers (i.e. tutors, content creators)
- Improving internal supplier-customer effectiveness
- Improving flow of information to and from customers
- Improving internal communications
- Preventing causes of unwanted variation
- Reducing random causes of unwanted variation
- (BUT) promoting wanted variation (i.e. identify change for the better and implement it into the syllabus)
- Quantifying quality costs
- Improving methods of producing and developing content and training programs
- Improving internal systems
- Improving overall flexibility and adaptability
- Reducing "waste"

What is more: Dropouts should be accepted as methodological-didactical challenge. Appropriate considerations have to be carried out:

1. Sufficient information on the measure in advance
2. Specification of the contents of the measure – which contents can be honoured with the participant group - which contents not?

There should exist opportunities for each teacher and participant to find the learning style that is most appropriate for the participant together, and if possible, to adjust learning

¹⁶⁰ See: Cedefop – European Centre for the Development of Vocational Training (ed.) (2006): Vocational education and training in Austria, in: Cedefop Panorama Series, 125, Luxembourg, p.15. Available at: http://www2.trainingvillage.gr/etv/publication/download/panorama/5163_en.pdf [29.06.2011]

¹⁶¹ Adapted from Thomas, Brian (1992): Total Quality Training, McGraw Hill.

situations to this learning style. It is recommended that vocational training be as client-orientated as possible.

5.6.5.2. Exercises

Individual exercises:

1. Have you in fact ever considered 'dropping out'? What were the reasons?
2. Review in your mind the last training course (vocational training) you have attended. Point out the most significant factors that influenced your motivation positively.
3. Taking into account your point of view as a participant identify which factors support the learning process most strongly and explain the reasons why.

Group exercises:

1. Discuss different dropout preventive measures and determine the best ones suitable for a certain target group.
2. Discuss the personal and societal costs resulting from dropping out.
3. Discuss how tutors and training institutions should deal with 'dropout'? Identify the scope of the problem in question.
4. Discuss why involvement of companies appears to be effective in keeping participants from dropping out.

5.7. Domain 7: Feedback and Evaluation

5.7.1. Feedback and Reflection

5.7.1.1. Theory Content

Training institutions have to guarantee that the professional, methodological-didactical and social competence of the tutors is regularly examined and ensured. The tutors are also interested to know about the impact of their training.

Definition

Feedback can be defined as the sending (or "feeding") back of information regarding the "output" to the controller of "input". By feedback it can be determined if the sent information was understood correctly and if actions led to the intended results. In the context in question feedback is interpreted as a method of learning the participants' impressions and the perceived benefits of participating in vocational training and as such a method of establishing a cycle of communication.

The overall objective in terms of quality management is learning. In order to ensure quality, institutions (and tutors) should learn how their services are perceived by participants. Did the measure help them in their vocational orientation? In what ways? Which part was helpful and which was not? What was missing? Only through obtaining feedback with regard to these issues can institutions and tutors learn how to improve their services. Therefore institutions should establish a system of feedback. Feedback has to be "institutionalised".

Several studies indicated that asking for feedback is (one of) the most important measures of quality assurance from the vocational training providers' point of view (44,5 %).¹⁶²

Generally there are four types of feedback¹⁶³: participant's feedback (1), peer feedback (2), 360° feedback (3) and supervision (4).

- 1. Participant's Feedback

Participants' Feedback (or *course feedback*), feeds back information about the participant's perceptions of the measure to the trainers and institutions. There are different methods of receiving this feedback: informal or formal, verbal or written (e.g. by means of standardised questionnaires), during or after a measure, once or on a regular basis, etc. The "best" method of receiving feedback does not exist: the method needs to be determined individually according to the purposes of the people requiring the feedback in question.

One important aspect to be taken into consideration is who requires feedback and to whom trainees give feedback.

- Feedback directly to tutors

It is essential for tutors to seek feedback from participants about their training. Because they are in face-to-face contact with the participants on a daily basis, they have a wide variety of feedback possibilities which they can use according to target group, group size, group phase, interventional intention, information need and time resources.

Depending on these factors the trainer needs to make decisions on the following issues:

Data collection vs. intervention – What is the goal of the person requiring feedback? Is it designed to simply collect information of the beneficial elements of the training, or is it an intervention in the group forming process? To some extent feedback will always have an intervention character because it forces people to reflect what has been happening so far.

Private vs. public – Feedback can be sought from every individual independently or in an open group discussion. Advantages of individual feedback is that the trainee's opinion is not dependent on the that of the leaders and that the output is higher (including that, which in group feedback, may have been left out "because it was already mentioned by someone else"). Public feedback has a stronger interventional character, runs the risk of being influenced by the opinion of leaders but brings the chance of being built in a brainstorming manner. An intermediate approach is aimed at allowing the participants to work together in small groups and present it at the session.

Getting feedback (face-to-face) in this way could be uncomfortable for the addressees. Hence, feedback should be presented in open-minded and positive atmosphere. The tutor should to keep this in mind. Working out some sort of "rules" helps to achieve a productive working environment. The tutors should provide clear guidelines with respect to the feedback system. The following guidelines for gaining feedback should be taken into account (The tutor should

¹⁶² E.g. Öibf (ed.) (2004): Qualitätssicherung und –entwicklung in der österreichischen Erwachsenenbildung. Eine Studie im Rahmen des Projekts „Instrumente zur Sicherung der Qualität und Transparenz in der Erwachsenenbildung in Österreich“ (INSI-QUEB), Wien, p 21. Available at: <http://www.oebf.at/db/calimero/tools/proxy.php?id=13306> [29.06.2011]

¹⁶³ See: Rabenstein, Reinhold / Reichel, René / Thanhoffer, Michael (2001): Das Methoden-Set. 5 Bücher für Referenten und SeminarleiterInnen. 3. Gruppe erleben, Münster, Oekotopia Verlag.

inform the participants about the feedback rules at the beginning of the training. The participants should abide the rules).¹⁶⁴

1. Listening instead of excusing and arguing.
2. Fairness and honesty in the response.
3. Subjectivity instead of generalisation of valuations (People should say "I", not "We".).
4. Communicate, what processes have been perceived during the training, what consequences might they have had and how have the processes have affected the individual. (Beware: It is important to split perception, interpretation and impact)
5. People giving and the ones getting feedback within the group should do this voluntarily.
6. The tutor should give feedback after all participants have given feedback. When the participants continuously breach the guidelines, the tutor should not force them to abide the guidelines, but ask them for reasons for their behaviour.

Structured vs. open questions - Participants can give feedback to the tutors making remarks against lists of specific activities; marks are based on a 5 point scale (from "helpful" to "not helpful"). The tutor can also ask "Which of today's activities did you find helpful?". Structured questions are useful if the tutor is interested in very specific information or if the group needs a lot of guidance. Open questions more likely lead to unexpected answers because participants are free to think of factors that have not yet been considered.

Verbal – visual – kinesthetic – Feedback can be given in different modalities: Participants can talk about their perceptions (in front of the group), they can write them down or draw them on a paper or even express them with body language. This decision should be taken considering the expressive abilities of participants and the current group situation. Usually a verbal group discussion of the results will follow.

Material usage – Feedback can be aided by the use of various materials. The materials are intended to help participants in the process of giving feedback, to enable further analysis or also to document the results of feedback. This can be any object symbolizing a microphone that is passed to the person talking at the moment (drawing the attention to this person and discouraging interruptions). Frequently moderation cards are used: the individual perceptions are written or agreement or mood is indicated (e.g. traffic light feedback: green for positive, yellow for neutral and red for negative). Also lists/handouts are frequently employed in feedback providing guidance and documenting the results.

Time requirements – Feedback can be given in 5 min ("Flashlight" – every participant says one sentence) or 5 hours (multi-stage interventions – collecting, reflecting, structuring, reflecting, summarizing...). This decision should be based on time resources but also on the respective interventional intention.

Metaphor usage – Many feedback methods use metaphors to inspire participants. This varies from portraying the group in a group-statue to building analogies to e.g. food (describing elements of training as "tasty, vitamins, fiber, hard to digest...").

- Feedback to training institutions

¹⁶⁴ See: Rabenstein, Reinhold / Reichel, René / Thanhoffer, Michael (2001): Das Methoden-Set. 5 Bücher für Referenten und SeminarleiterInnen. 3. Gruppe erleben, Münster, Oekotopia Verlag.

It is common practice that not only the tutors but also the institution asks for participants' feedback on the measure. This is done based on two motivations: to learn about and improve the measure and also to control the tutors' work. Therefore participants' feedback to institutions is a delicate matter: tutors might be scared of an evaluation of their work and the participants are likely to know that their feedback might produce consequences for the tutor. Therefore, a couple of issues should be clarified and transparently communicated to avoid such situations:

- **Why?** What is/are the goal(s) of feedback?
- In **whatway** is it to be obtained? Most likely with a questionnaire.
- **When** is it to be collected? During the measure or after it ended?
- **Who** will collect the feedback? The tutor him/herself or the administrative personnel?
- **Who will analyse** the data and how? Are the tutors involved in the process?
- **Who gets access to the information?** Quality manager? Senior tutor? Tutors? Participants? The commissioning agency?
- **How are the results communicated** to the tutors? It is important that tutors also get the chance to learn from feedback that was not given directly to them.
- **What are the consequences** of "good" or "bad" feedback? Who decides that?

These questions should be answered, stated in the internal quality management system and communicated transparently especially to the trainers and also to participants. It is an important part of "institutionalising" feedback.

- Feedback to the commissioning agency

Commissioning agencies are also asking participants for feedback. When reporting back to the agency after completing the training participants have to fill in a questionnaire about the completed measure. In an ideal situation these data are analysed by an independent institution and reported to the commissioning agency. The goal of this form of feedback is to gain independent information about the quality of the services delivered by the training institution. Still the results of this feedback should be communicated back to the institution and the tutors. It is important information in enabling institutions and trainers to learn and improve their services.

- Peer Feedback – Support and Hospitations

The tutors should have the opportunity within the institution to deal with the information fed back. The institution has to provide opportunity for *professional* reflection. One way to do this is to establish *support* structures. The institution needs to provide space and time for collegial counseling or reflection. Tutors need to discuss their individual experiences with colleagues and receive feedback from them.

Working in a team is a way of inspiring informal feedback and discussion; formal structures like an in-service training day or a prescribed (and remunerated) number of "*hospitations*" (tutors take part/watch each other's trainings to learn from each other) should also be established.

To support constructive feedback among colleagues as well as between the participants and tutors the attention should be paid to the following feedback rules:

- **Constructive:** Feedback should leave possibilities for change
- **Descriptive:** It should be actual, not attaching values to the facts, without making accusations
- **Precise:** Feedback should be as precise as possible, specific and not general
- **Subjective:** People should say “I” instead of “you” or “we” instead of “they”
- **Not only negative:** Not only criticism should be given, feedback is easier to accept if it is balanced.

There are also some rules for taking feedback:

- **Let the other person finish**
- **Do not defend or justify** your actions, feedback is about how the other person perceives one’s actions. It is important that people should be encouraged to ask questions if anything is not clear.

To ensure the people to follow these rules it is recommended that a handout on feedback rules is given to participants and tutor colleagues.

- 3. 360° Feedback

360° Feedback refers to feedback from all sides, from a variety of sources of different hierarchical levels. It can be seen as a combination of the abovementioned techniques. For example, a tutor can receive feedback from participants, colleagues and his/her supervisors. It leads to a more differentiated picture of the impact of one’s actions and to a more complete understanding of one’s place and how that is embedded within the organisation.

- 4. Supervision

Regular *supervision* of tutors (including freelancers) as well as goal-oriented consultation and support structures from the team leader internally in the training institution is an important mechanism for dealing with experiences and of learning lessons from them in a constructive way.

Conclusion: Tutors commonly use personal feedback (e.g. at the end of a course or course part) to monitor their personal success and improve their own performance. Some monitoring models split the paper based feedback so that statistically relevant material gets fed into the organisation while qualitative monitoring results are processed solely by the tutors. A good tutor discusses qualitative results of evaluation and monitoring with his/her trainees giving them a chance to explain what they meant and therefore using it as a learning experience.

5.7.1.2. Exercises

Individual exercises:

1. Define feedback as much precisely as you can in 3 sentences.
2. List the different types of feedback you know and describe each in 2-4 sentences.
3. Design a feedback intervention from participants to tutors with the following characteristics:
 - a. **Goal:** Learning about participants' benefits from the measure, knowing about what training elements are especially beneficial
 - b. **Target group:** 15 long-term unemployed manual workers, between age 35 and 55, some of which have impaired hearing
 - c. **Time:** In the middle of a blocked 6 week training measure
4. Imagine yourself a quality manager in a training institution wanting to establish a standardised feedback system about individual courses with the goal of assessing the individual tutors. How would you proceed? Set up a proposal to include the following aspects:
 - a. When and how will feedback be collected?
 - b. How and by whom will data be analysed?
 - c. How and by whom will results be interpreted?
 - d. What will be the consequences?
 - e. How will the results and consequences be communicated to the tutors?
 - f. How can you gain acceptance of this instrument by the tutors?

Group exercises:

1. Design a feedback intervention from participants to tutors with the following characteristics:
 - a. **Goal:** Learning about participants' perception of the tutors' qualifications
 - b. **Target group:** 8 women re-entering the labour market after the baby break
 - c. **Time:** After the 3rd day of a (blocked) 8-week measure
2. Give feedback to one of your colleagues following the feedback rules and ask for feedback for yourself.
3. Imagine yourself a quality manager in a training institution wanting to establish a standardized feedback system about individual courses with the goal of improving the measure quality. How would you proceed? Set up a proposal including the following aspects:

- a. When and how will feedback be collected?
- b. How and by whom will data be analysed?
- c. How and by whom will results be interpreted?
- d. What will be the consequences?
- e. How will results and consequences be communicated to the tutors?
- f. How can you gain acceptance of this instrument by the tutors?

5.7.2. Internal evaluation

5.7.2.1. Theory Content

Evaluation is the systematic determination, analysis and appraisal of processes in organisations and systems. Evaluation studies could refer to different levels of a training institution:

1. evaluation of overall results of the organisation (compared to the mission, concept, short and medium term planning etc.)
2. evaluation of management, administration and infrastructure
3. evaluation of training:
 - evaluation of the context (e.g. preconditions, frameworks)
 - evaluation of the process (covering all stages including the preparation of a course, delivery of training and the follow up) or/and
 - evaluation of the training outcome.

At vocational training centres all three areas listed above should be actively involved in the evaluation process.

Many of the existing evaluation evidence relates to learning results¹⁶⁵ (outcome). There are two main reasons:

- It is appropriate. Learning results directly represent the aims of career guidance interventions. Mostly, career guidance is aimed at not telling people what to do but helping them to acquire knowledge, skills and attitudes which will help them to make better career choices and transitions.
- It is fairly easy to do. Since learning results are immediate they are relatively easy and cheap to measure. Studies of longer term results are more complex and expensive to mount, and more subject to contamination from extraneous factors.

¹⁶⁵ Such as precursors (attitudinal factors which facilitate rational decision-making such as reduced decision-anxiety), self-awareness, opportunity-awareness (learning about opportunities and options), decision-making skills (learning rational decision-making skills and strategies), transition skills (learning skills for implementing decisions, incl. job-search skills and interview skills) and certainty of decision.

Sometimes evaluation is a controversial proposal. There are several reasons for this, including:¹⁶⁶

- Who will carry out the assessments?
- What evaluation criteria will be used? There is no simple and clear definition of quality. Criteria may vary according to objectives and disciplines and assessment is often carried out in tough conditions. Moreover the quality changes along with the development of disciplines, educational activities and environments, while different stakeholders pay varying attention to different aspects of it.¹⁶⁷
- Will the cost of external accountability reach unacceptable levels thereby reducing the institution's ability to invest in quality improvement?

Nonetheless, evaluation is very important. Evaluation serves as self-examination. If it is missing, it is likely that the institution fails to reach its goals. On-going quality evaluation helps to keep an eye on the institution's targets and therefore helps to achieve and review quality. The permanent comparison of current state and target state by the means of qualitative and quantitative methods enables the institution to improve itself.

Internal versus external evaluation

Quality evaluation may be undertaken internally or externally. External evaluation is a process of evaluation carried out by a third party. Internal evaluation is an internal way of reviewing quality or standards, undertaken by the institution (or the actors of the institution) itself. Each, internal and external evaluation, has its own advantages and disadvantages. E.g. an external expert is more expensive but has the advantage of an independent and professional position. Internal evaluation refers to the fact that it is planned, conducted and reported by the internal staff of an institution. As a consequence it runs the risk of being biased by an internal perspective or a lack of the professional methodology and objectivity required by commissioning agencies. Whichever of the abovementioned methods is chosen, the results should serve as the basis for further action to improve quality. Both strategies can be combined to achieve the best results.

Rossi, Freeman and Lipsey¹⁶⁸ underline the position that internal evaluation must be given more prominence than external evaluation: internal evaluation can be considered as a form of empowerment of the employees, it encourages them to think about the quality and reflect on the actual status of the measure/ training. This contributes to organisational learning and the development of a learning organisation. Due to the frequent contact of evaluators and decision makers within the institution, internal evaluation quite often has a higher impact on

¹⁶⁶ See: Green, Diana (1994): What is Quality in Higher Education, Society for Research for Education, Buckingham, Open University Press, p. 22.

¹⁶⁷ <http://www.nokut.no> [29.06.2011]; NOKUT: Criteria For Evaluation

¹⁶⁸ See: Rossi, Peter / Freeman, Howard / Lipsey, Mark (1999): Evaluation – A Systematic Approach, London, Sage Publications.

actual decision making.¹⁶⁹ Internal evaluation therefore helps to develop a strong culture of quality in the institution. The system must clarify the internal tasks and responsibilities within the general quality framework.

According to Rossi, Freeman and Lipsey training institutions are therefore well advised to continuously submit their training measures to internal evaluation procedures. If no in-depth knowledge of research techniques is available within the organisation, advice from external experts should be obtained when developing an evaluation concept.

Before the beginning of an evaluation the institution has to specify a number of important facts and to answer to the following questions:¹⁷⁰

- What is the purpose of the evaluation? Why is it being undertaken?
- What are the goals of the measure? How can they be measured? Which aspects are an integral part of evaluation?
- Which groups of people will be taking part in the evaluation (tutors, administrative staff, participants)?
- What instruments for data collection will be used?
- What will the results be used for? (e.g. quality improvement, benchmarking – comparison with other institutions/partners/networks)
- What are the consequences for the measures that will be derived from the results?
- How are the results used? Who will drive and organise the processing of the results? Will the results be published for the participants and/or tutors and communicated to the contracting bodies?

Purpose of the evaluation

The purpose of evaluation procedures is to improve output and processes.¹⁷¹

Defining the measure's goals and making them measurable

It should be intended that through means of continuous evaluation the quality assurance system will embrace all the significant processes, from the quality of access to potential applicants to the quality of the course. This also includes systems for the evaluation of teaching by participants of the course, self-evaluation and follow-up of evaluations by the institutions, documentation of the institution's work in the learning environment and the processes for quality assurance of new course provision.¹⁷²

¹⁶⁹ See: Rossi, Peter / Freeman, Howard / Lipsey, Mark (1999): Evaluation – A Systematic Approach, London, Sage Publications, p. 424.

¹⁷⁰ Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Education and Training – Interim Report of the European Forum, p. 23. Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [29.06.2011]

¹⁷¹ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 31.

¹⁷² www.nokut.no [29.06.2011]; NOKUT: Criteria for Evaluation

A good quality assurance system is both a management instrument for the institution and a practical tool for regular improvement of day-to-day activities. The system should therefore be founded on systems closely associated with the learning processes themselves and the learning environment and should motivate staff and participants of the courses and involve them in the work. Work on quality through evaluation should not be reduced to purely system of inspection and control.

The training institution should develop its own concept of an evaluation procedure which can orientate itself along the quality cycle¹⁷³ of the measures (planning - implementation - evaluation and reflection of the results). With the help of the evaluation concept the processes behind the implementation of a measure can be methodically collected and evaluated.

Internal and external evaluation, formative and summative evaluation follow all the same logic in the sequence of processes which leads from the definition of the global goal of the measure to breaking it down into action-goals and in the end to the definition of precise indicators.

1. Definition of global goals

Employability of the labour force: In general the concept of employability reflects the attempt to comprehend the relationship between vocational training and employment. In one respect employability refers to the individual and to his/her responsibility to help bringing about the conditions necessary for participation in employment. But it also refers to the system of employment relations, including business practices, which provide incentives and raise expectations concerning the prerequisites of the workforce. Cedefop's working definitions refer to the individual and includes particularly two components of willingness: to be mobile and to develop occupational competences.¹⁷⁴

Matching training supply and demand of the labour market: With the increasing need for vocational training in recent years, it is important that the training systems match supply more closely to demand of the labour market. Thus matching mainly refers to the adaptability and responsiveness of the vocational training system to the changing demands of the labour markets. The main factors of improving matching is through information and dissemination procedures, including forecasting mechanisms and a responsive provision of vocational training on the part of the training system. The degree of utilisation of acquired skills should be seen both from the point of view of the employee and of the employer.¹⁷⁵

Access to vocational training, in particular vulnerable groups on the labour market: Access refers to the right to, and the actual possibilities of an individual to participate in,

¹⁷³ See: Burri, Thomas (2004): EduQua – Handbuch – Information über das Verfahren. Anleitung zur Zertifizierung, Thalwil, p. 31. Available at: http://www.eduqua.ch/pdf/eduqua_handbuch.pdf [29.06.2011]

¹⁷⁴ See: Cedefop: Glossary on identification, assessment and validation of qualification and competences; and transparency and transferability of qualifications.

¹⁷⁵ See: Cedefop: Glossary on identification, assessment and validation of qualification and competences; and transparency and transferability of qualifications.

vocational training whenever needed. This need could be a personal motivation or due to the actual situation of the individual society. In general its permeability, the validation of prior learning and the availability of individualised training will influence the accessibility of the vocational training system.¹⁷⁶

2. Definition of strategic goals

The first and most important step of an evaluation is the definition of the measure's strategic goals. Which goals is the measure aiming at and in what hierarchy do these goals relate to each other? Examples of strategic goals:

- Vocational orientation of participants
- Motivational activation of participants
- Developing participants' personality
- Stabilisation of participants (Debts, Housing, Substance abuse,...)
- Integration into labour market

If an internal QM concept exists, the goals have already been defined. It is recommended to continuously review the goals stated in the QM concept though, as goals also change as time passes.

3. Definition of action-goals

What is done or planned to achieve these global goals? Which actions are taken? With what intentions are certain activities planned? To whom is every individual course addressed? There should be more than one action goal defined for every strategic goal (SG).

As an example the strategic goal "Vocational Orientation" is broken down into action goals:

- Identification of participants' strengths and weaknesses
- Identification of participants' needs and resources
- Information about labour market
- Information about (further) qualifications
- Individual development plans
- Internships

4. Definition of indicators

How can the success of the actions that have been undertaken be made visible? How can you see that it works? Each "action goal" has to have defined a possible indicator; if possible one that captures all aspects of the specific action goal. These indicators have to fulfil many demands: in short they should be SMART.

S – Specific They have to refer to a specific target, not a global goal

¹⁷⁶ See: Cedefop: Glossary on identification, assessment and validation of qualification and competences; and transparency and transferability of qualifications.

M – Measurable They have to be measurable (which implies observable in some way)

A – Acceptable There has to be a minimal consensus that the indicator is necessary

R – Realistic It can be measured with available resources

T – Timed It has to have a reference to time which has to fit the time perspective of the project

Indicators are intended to support the achievement of certain objectives, i.e. they always have to be linked to clearly defined objectives. To support the achievement of the three policy priorities (better employability, matching and access) set by the Member States of the European Union, it is proposed that the indicators used for quality development in the vocational training system reflect these policy objectives. Furthermore, the indicators should not stand in isolation. They should be related to each other. When deciding on a system of indicators, different starting points, goals and objectives in both initial and continuing vocational training should be taken into consideration. It is recommended that all indicators referring to the level of trainees should provide information by gender. Important: social partners should participate in the definition and selection of indicators. The relevant actors in the vocational training system should be included in the development of a coherent system of indicators and in the development of a corresponding implementation strategy. The use of indicators should not be restricted to the assessment of previously set quality objectives, but should be included in, and be a substantial part of, a broader learning process in the vocational training system.¹⁷⁷

As an example the action goal “Identification of participants’ strengths and weaknesses” has the following possible indicators defined:

- At least 3 of participants’ strengths/weaknesses are filled in by tutor on participant’s record after the first week of the course.
- If the question “What are your personal strengths and weaknesses” (e.g. in an evaluation interview) is set the participant should be able to name at least 3 strong 2 weak features within 5 min.
- Tutor’s judgment of following statement (in an evaluation questionnaire at the end of the measure): “The participant is applying to the positions where his personal strengths can be applied” is either “true” or “completely true”

Input and process indicators supply important information about why a certain output was reached or not. In a comprehensive (and learning oriented) evaluation all three categories should be fitted with indicators.

¹⁷⁷See: Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Training, Interim Report of the European Forum, p. 33. Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [29.06.2011]

Preliminary proposal for a set of indicators on quality according to Cedefop¹⁷⁸:

- Indicators measuring employability

Competences	participation rates (according to groups to be defined) basic skills (literacy, numeracy, social skills) proportion of training measures providing ICT skills relationship of training to relevant work environment
Completion	proportion of failures and drop-outs ¹⁷⁹ completion rates by type of vocational training
Transition	transition rates by educational attainment (for initial vocational training only) effectiveness of transition proportion of bottlenecks broken down by type of vocational training
Employment	proportion of former trainees still in employment after 12 months

Indicators measuring the match between supply and demand

Information	existing mechanisms to produce and disseminate information
Responsiveness	reduced mismatch through vocational training utilisation of acquired skills (from the perspective of employer and employee) existing policies to promote new provisions
Adaptation/ Innovation	proportion of courses reviewed in the light of demand proportion of new offers in vocational training according to demand

Indicators measuring access to vocational trainings, especially for disadvantaged people

Broadening Access	accessibility (differentiated according to certain groups to be defined) existence of information, motivation and guidance systems
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¹⁷⁸ See: Cedefop – European Centre for the Development of Vocational Training (2002): Quality Development in Vocational Education and Training, Interim Report of the European Forum, p. 34. Available at: http://www.trainingvillage.gr/etv/upload/projects_networks/quality/archives/conf_docs/en/report_qdevelopment_draftforum_en.doc [29.06.2011]

¹⁷⁹ It must be considered that people leave measures, if they find a job. These people should not be included in the drop-out-rates.

	existence of (financial) support schemes
Disadvantaged groups	existence of outreach activities proportion of enrolments to special offers completion rates by group
Permeability	existence of mechanisms to validate prior learning proportion of individualised pathways for certain groups

Only after these indicators¹⁸⁰ have been defined a decision about the methods of data collection can be taken. Only now information about who shall be asked or what is to be measured is available.

People to be involved in evaluation

Another important aspect to be considered is which people will be involved in evaluation. It is recommended that all key actors of an institution (e.g. participants, customers, tutors, managers, staff personnel, local authorities etc.).¹⁸¹ Evaluation easily inspires fears and resistance among the employees, as they anticipate a judgment about their achievements and probable consequences for their employment (e.g. loss of job). A viable way to deal with this issue is to let employees participating in the definition of goals make the decisions about data collection methods and use of results. If employees cannot for any reason not be included in this process, institutions should at least aim for maximum of transparency to ensure cooperation. Anonymity has to be guaranteed for participants if unbiased opinions are wanted.

Data collection

In the process of data collection different instruments can be used: document analysis, questionnaires, interviews, tests, check lists, observation lists, etc.¹⁸² The choice of instruments depends on the size of the institution, its resources, on the topics and target groups. Usually, the choice will have to be a compromise between precision and completeness on one side and time and financial resources on the other.

In any case whichever methods of data collection are used, this represents an indispensable element of the evaluation. The training institution has to define and state this methodological procedure in its evaluation concept.

¹⁸⁰ Some of these indicators are based on quantitative data; others are based on soft information. This mixture of hard and soft indicators seems appropriate for quality, which in itself is a complex concept.

¹⁸¹ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 31.

¹⁸² e.g. Lamnek, Siegfried (1993): Qualitative Sozialforschung – Methoden und Methodologie, Bd. 1 u. 2, Weinheim, Psychologie Verlags Union. Or: Bortz, Jürgen / Döring, Nicola (2005): Forschungsmethoden und Evaluation für Human- und Sozialwissenschaftler, Heidelberg, Springer Medizin Verlag.

Analysis and evaluation

Analysis should be carried out by someone with an in-depth knowledge of statistics and social research techniques. Ideally the plan values should be defined for every indicator before the actual collection of the data and made transparent as early as possible. Defining the plan values only, when data are already available, could lead to huge biases.

In the process of evaluation the collected data (actual values) are compared to the planned ones (plan-values). The difference between these two values tells if the actions were successful and if goals have been reached.

Consequences of the results

Results and developments should be recorded and compared with the initial objectives. Deviations are then identified, analysed and new objectives are set.¹⁸³

To ensure the evaluation consequences, a couple of questions should be answered (if possible beforehand) and stated in the evaluation concept.

- What does it mean if certain goals are not reached? What is the implication? This question should be answerable referring to the hierarchy of goals described above. It states inferred causal relationships e.g. measure A leads to achievement of goal xy.
- What has to be changed?
- How can it be changed?
- Who is responsible for changing it?
- When and how will changes be evaluated?

Explanations and reasons should be communicated in a comprehensible way, so that they are also understood by external interested parties. The evaluation should be transparent, clear as to why in the long run certain results have led to a certain judgment (Transparency is a vital component of a quality management system.).

Furthermore as experience shows that in order to improve the processes, evaluation of specific fields which are then subjected to improvement brings better results rather than trying to solve all problems at once.¹⁸⁴

¹⁸³ See: Reischmann, Jost (2003): Weiterbildungsevaluation. Lernerfolge messbar machen, Neuwied, Luchterhand Verlag, pp. 18-20.

¹⁸⁴ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p.31.

5.7.2.2. Exercises

Individual exercises:

- Give a precise definition of evaluation in 3 sentences
- Contrast internal and external as well as formative and summative evaluation against each other. What are the differentiating factors? Can an internal evaluation be summative?
- Plan an internal evaluation project with the goal of assessing the tutors' competences. Structure it according to the typical phases of evaluations and define critical milestones.
- One strategic goal of a vocational orientation measure is to have a good outplacement phase. Define at least 5 action goals to achieve that.
- Choose 2 of the action goals you just defined and find at least 3 SMART indicators for each of them.

Group exercises:

- Plan an internal evaluation project with the goal of improving your service. Structure it according to the typical phases of evaluations and define critical milestones.
- One strategic goal of a vocational orientation measure is to integrate participants into the labour market. Define at least 5 action goals to achieve that.
- Choose two of the action goals you just defined and find at least three SMART indicators for each of them.

5.7.3. External Evaluation

5.7.3.1. Theory Content

External evaluation processes are essentially based on the same principles as internal evaluation processes. The main difference is that they are conducted by external experts instead of internal employees. The main goal of an external evaluation is that, with the aid of external expertise, strategies for quality improvement are developed. Another goal is the control of success.

As already mentioned in 7.2., external experts have the advantage of a neutral and objective position. Another advantage is their expertise on evaluation design and techniques, which might not be available at the organization. An important aspect is therefore selection of an external evaluator.

Selection of external evaluators

The central question in selecting an external evaluator is who selects the evaluator and based on which criteria?

- Who selects external evaluators?

The institution responsible for the implementation of the training measures should select evaluators. Usually it is rather the training institution than the contracting body.

One of the basic principles of external evaluations is that external evaluators should be neutral, objective and have no conflict of interest with the training institution (or with the contracting body). The evaluators should be independent in their activity and support the goal of the evaluation in an unbiased way (as well as possible) aiming at the optimisation of the measures and all actions associated with them (planning, implementation of the measures).

- Which competences, qualifications and abilities should the external evaluator possess? There is a list¹⁸⁵ of necessary qualifications:

- **Content-wise expertise:** special knowledge of the evaluation subject and its context conditions (labour market, vocational qualification, training, target groups)
- **Methodological expertise:** Knowledge and experience regarding the design and instruments of applied and scientific research, comprehensive method knowledge (research design, instruments design both quantitative and qualitative, sampling, interviewing practice, statistical and qualitative analysis)
- **Project Management skills:** Administrative organisational knowledge, practical experiences outside the scientific community
- **Social competence:** Role-taking capabilities, communication skills, interpersonal skills, diplomatic skills, work experience (best on management level in a comparable institution, if possible international)
- **Reporting competences:** presentation skills, reporting, social-psychological techniques, (expert/within the range of methodology didactics)

Another quality criterion of evaluation is the **use of evaluation quality standards**. Lists of such standards are published, for example, by the German society for evaluation (Deutsche Gesellschaft für Evaluation - DeGEval) and are also available in English¹⁸⁶. They deal with the issues of utility, feasibility, propriety and accuracy. Before commissioning an external evaluation the structural implementation of these (or comparable) standards should be verified.

External evaluators are somehow dependent on the organisation they evaluate:

First they need the overall support and backing of the institution: external evaluators should be commissioned by and have the support of high management, at least by the level accepting and working with the results of the evaluation. Otherwise it runs the risk of being ignored if results are not up to the expectations of management. Also the distribution of roles has to be stated as clearly as possible: Who is responsible for the collection of data? Who for evaluating the results? Who is responsible for defining consequences?

¹⁸⁵ See e.g. Wottawa, Heinrich / Thierau, Heike (1998): Lehrbuch Evaluation, Bern, Huber, pp. 50-51.

¹⁸⁶ See: <http://www.degeval.de/calimero/tools/proxy.php?id=72> [29.06.2011]

External evaluators need data and materials and all the documentation required should be provided to them during the evaluation process. Relevant documents are for example the self evaluation reports, the concept, measure description or QM-system reports.

Project cycle of external evaluation projects

After an external evaluator has been selected the actual process of evaluation begins. This is typically done in the course of a goal workshop where the external evaluator moderates the definition of program and evaluation goals and brings them into a goal-hierarchy. This clarification process usually greatly contributes to the development of shared conscious and explicit expectations thereby uncovering any contradictions or goal conflicts.

There are a number of very typical conflicts arising at this stage:

- **Conflict of interest between the commissioner of the evaluation and the institution** - The commissioning agency usually wants hard facts to judge the success of the measure while the training institution wants detailed and soft information to improve the measure. *eg. in an activation and qualification measure the commissioning employment agency wanted a concise picture of the measure's performance preferably on one printed page of facts while the partaking institutions wanted a substantial qualitative description of participants' benefits.*
- **Role-conflict of the evaluator** – institutions would like to be positively evaluated as far as their services are concerned to get funds while the commissioning agency wants an objective view to decide about future funding. *E.g. as institutions have substantial control over the data needed for the evaluation (e.g. participants' addresses), they frequently try to pre-select the data handed over to evaluators.*
- **Conflict of interest of different departments of the institution** – If measures consist of different modules, their goals are often conflicting. *E.g. in an activation and orientation measure concentrated on an artistic performance of the participants, modules strongly disagreed about the question whether preparation time for the artistic performance or time for an outplacement phase after that performance were more important.*

After the goals have been defined the evaluator develops an evaluation design stating the core characteristics of the evaluation project. The design defines which instruments will be used (interviews, questionnaires, etc.), at what time and which stakeholders will be interviewed (e.g. participants, employees, external stakeholders...).

Then the process of data collection takes place within a defined time period. During this on-site visit the external evaluators conduct detailed interviews with different persons within the institution (like: tutors, participants of measures, staff members of different levels – administration, management level...). They should continuously report results of different investigations conducted.

After finishing the on-site visit the evaluators should give a first feedback to the institution. The evaluation process is finished by the writing up and submitting of an evaluation report. The evaluation team will also submit a defined set of follow up recommendations

(improvement measures).¹⁸⁷ External evaluation assesses also the internal quality assurance system.

Criteria for evaluation

The quality assurance system of the whole institution should be covered by the evaluation process - activities related to educational quality and the total learning environment. It must include all provision, external or internal, for which the institution is responsible. In evaluating the quality assurance system, the following aspects and functions of the system¹⁸⁸ should be clarified in particular:

1. The ways in the quality assurance became an integral part of the institution's strategic work.
2. Objectives of the quality assurance for the institution.
3. How is quality assurance linked to steering and managing at all levels of the organisation?
4. How is quality assurance routinely organised? Which measures ensuring broad participation with defined distribution of responsibility and authority at various stages of the work are used?
5. How does the institution retrieve and process such data and evaluative information necessary in order to make satisfactory assessments of the quality of all training units? How is this information accumulated at higher levels, including the top level of the institution?
6. In which way and how systematically is the analysis of the information and assessment of quality assurance goal achievement carried out?
7. How does the institution use the quality assurance results as a basis for making decisions as well as measures aimed at securing and further enhancement of the training quality?
8. How does the quality assurance work contribute to resource management and priorities at the institution (human resources, infrastructure, service)?
9. How does the system ensure the focus is on the total learning environment and active participation of students in quality assurance and learning environment?
10. Does the regular Quality Report submitted to the board of the institution give a coherent overall assessment of educational quality at the institution and an overview of plans and measures for continued work on quality?

¹⁸⁷ A further concrete operational of the external evaluation process is not given here.

¹⁸⁸ See: NOKUT: Criteria for Evaluation; www.nokut.no [29.06.2011]

5.7.3.2. Exercises

Individual exercises:

1. What are the advantages and disadvantages of external evaluation? Make a list.
2. You get the task to select an external evaluator for your institution who will be hired to optimising the services. Compile a detailed job description.
3. Set up a project plan for an external evaluation defining critical milestones.
4. Imagine you are an external evaluator going to the 'kick-off' workshop with a new customer. Representatives of the institution and the commissioning agencies will be present. What will you do and what should you bear in mind?

Group exercises:

1. You get the task to select an external evaluator for your institution. The assessor is supposed to evaluate your institution and report to you as well as to the commissioning agency (Who will make a decision with regard to further funding for your institution on basis of the report?). Compile a detailed job description.
2. Imagine you are an external assessor going to the 'kick-off' workshop with a new customer. Only representatives of the commissioning agency will be present. What will you do and what should you bear in mind?

5.7.4. Control of Success & Placement

5.7.4.1. Theory Content

1. Control of Success

Control of success is one of the main goals of evaluation. Commissioning agencies demand to control not only the qualification but also the *success* of an institution in providing qualitative vocational-training. Their orientation is shifting from **controlling the input** (e.g. financial, qualifications) to **controlling the output** (e.g. placement quota of participants).

Which success criteria exist?

The success criteria used for monitoring training success depend on the part of the training process which is being monitored and/or the thematic framework of the monitoring (i.e. pedagogy versus workplace-related versus controlling focus).

Success criteria of the training process relevant for monitoring are:

- Upfront educational needs (i.e. whether the content fit with the needs of the clients)
- Evaluation of the learning process as it is
- Evaluation of the learning outcome
- Evaluation of the transfer of learned material to the workplace (or everyday life) of the participant
- Cost/efficiency analysis (i.e. whether the outcome justify the costs)

- Specific goals of the client organisation (like a certain percentage of trainees finding a job)

Future funding often depends on the success of the activities carried out in the past. In addition, knowledge about success is also relevant for the training institutions (When holding a course the definition of success has to be frequently examined.).

Indicators

Control of success is based on a small number of indicators. Generally it appears to be necessary that precise success indicators should be defined by the contracting body and the training institution at the beginning of the course in accordance with the objectives of the measures.

To guarantee **sustainable effects** the potential of the trainee success and the ability of every individual trainee to transfer the vocational *success* to everyday life shall be clarified during the course planning and implementation. How can it be ensured that knowledge acquired in the course can be used in the daily life? Are there any measures for the promotion of the learning transfer present? Is knowledge transfer considered in terms of contents and methods? The following questions should be answered during the planning phase and the implementation of the training course:¹⁸⁹

- Is there any connection between theoretical knowledge transfer and practical application?
- Does a certain variety of both exist?
- Are there any offers and structures planned for the participants after the completion of the training?
- Is any continuous assessment of the learning success of the participants envisaged?
- Are the goals defined in a way that will allow continuous assessment?

The control of participation success should be started at the course planning stage. One problem one that often occurs is that **changing of goals**. Frequently innovative measures are set up for “new” target groups about who’s needs little is known. Therefore it frequently occurs that action goals change during the course of a measure. As change and adaptation are integral parts of innovation this should not be prevented. Still it is important that these changes in the goal-hierarchy are made explicit, documented and communicated to all involved stakeholders, especially the people responsible for the evaluation.

Another problem frequently encountered is **finding an adequate comparison group**. To arrive at the success of a measure the effects of the measure have to be compared to a similar group of people that did not participate in the program. Even when people are not participating in a vocational orientation measure they may still be looking for jobs, qualifications etc. Neglecting this fact would lead to an overestimation of the measures effects. One possibility is to compare participants “behaviour” to that of the basic population targeted by the measure (in short, all people that could have participated in the measure i.e. that would have been eligible after selection criteria used by employment agencies). Ideally

¹⁸⁹ See: Burri, Thomas (2004): EduQua – Handbuch – Information über das Verfahren, Anleitung zur Zertifizierung, Thalwil, p. 48f. Available at: http://www.eduqua.ch/pdf/eduqua_handbuch.pdf [29.06.2011]

this should be people that would have wanted to participate but maybe due to limited capacity of the institution couldn't. Waiting lists are a good source for group comparison.

Another possibility is to compare the measures success indicators to that of similar measures (**Benchmarking**). These comparison projects should be as close to the measure in question as possible (regarding target group, duration, method...).

The most essential evaluation criterion is the **matching of the targeted group** of people with the actual participants of the measure. Still this criterion is often not paid appropriate attention: after all it is the fundamental prerequisite of the measure-concept work. The best concept for one target group may not suit any other. With no proper target group other indicators of success become secondary. What is the conclusion of finding out that a measure designed for young drug addicts does not work for lengthy unemployed adolescents? It certainly doesn't tell you anything about whether the concept would work for the target group.

Also the target and actual **distribution of participants' gender** might be an interesting success indicator.

The **drop-out quota** (quota of participants that started as opposed to those who also finished a course) are another important success indicator. Interpretation has to carefully determine who dropped out because of joining an inappropriate course and those who drop out for other reasons (e.g. relapse into addictive behaviour, medical reasons, find a job...).¹⁹⁰ One way of doing this is through the institutions documentation system: the reasons for leaving a course should be recorded as precisely as possible, based on, for example, the following categories:

- employment (1st labour market)
- employment (2nd labour market)
- further training/ qualification
- medical reasons
- therapy
- pregnancy
- other reasons (specify if further analysis is possible)
- reasons unknown (i.e. participant left without further notice)

One of the principal purposes of vocational orientation/job counselling and activation measures can be seen in the successful integration of the participants in different employment conditions. Therefore **job finding rates** are a frequently employed criterion for the success of a vocational training/counselling measure. Almost as frequently, the period of time this in which this integration has to take place is not defined. This is alongside the lack of examination of the kind of employment participants find their way into (Did they find a job in the primary or secondary labour market? Have they found a job according to their qualifications and competences? Which kind of contracts did they receive? Full time, part-time or freelance conditions?).

Not only the job finding rates should be examined. Success also means that the measure **meets the expectations of the participants** (participant satisfaction).

Additionally the **time that former participants stay in their jobs** is very important factor and is a good indicator for the sustainability of vocational orientation and activation. A possible segmentation may be used for former participants who:

¹⁹⁰ Sometimes people find a job during the measure. These persons should not be included in drop-out quotas.

- are still in the same job
- switched to another job – How often have they switched?
- had a job but have become unemployed again
- have alternating phases of employment/unemployment

The analysis of **job changing behaviour** can lead to important conclusions about different types of participants (e.g. frequent changers).

Also the **enrolment into (further) qualification measures** and whether participants finish or not in the due time can be good indicators of the vocational orientation measures' success.

Internship as a consequence of the measure can also serve as an indicator of success.

Beginning a therapy, related to mental health or substance abuse, could be considered an indicator, especially if it can be linked to the success or time spent in therapy.

The learning input, acquired knowledge, abilities and competence which are beyond the framework of the measure, can also be employed in the everyday life and in a possible new job. A relevant success definition (indicators) should cover all of these topics/issues.

Main problems

The main typical problem arising when evaluating these criteria is **contacting participants after they have left the measure**. The data on specific characteristics of the participants' jobs are usually not a part of standard monitoring systems. Therefore it is necessary to contact former participants to ask about these details some time after they completed the course. It can be carried out within the range of a couple of months to a couple of years after the course completion. Typical problems at this stage are the unavailability of contact addresses ((E-)Mail, telephone) and the "self-selection" of respondents:

- Registration, storage and protection of data privacy usually limit the possibilities of making contact with former participants. To solve this issue, participants should be informed of the forthcoming evaluation and be asked to participate in it while they course is still underway. The data privacy issues should be clarified prior to the evaluation process to assure its smooth running.
- The other problem typically faced is of the "self-selection" of respondents. Only a certain group of people respond the interview invitations or send back filled in questionnaires based on which it is almost impossible to determine whether the results are representative. One possible way to resolve this problem is to oblige participants to take part in the evaluation, linking it to payments/benefits.

Who is responsible for monitoring the course success?

Basically (practically) it is the responsibility of the managerial staff of the training institution. They should provide clients and tutors with necessary material (questionnaires, or maybe even an ombuds-person) to facilitate the monitoring process and they should process the results to inform all stakeholders. On the transfer level it is also the responsibility of contracting bodies to monitor the success of measures they initiated. For this kind of evaluation there should be specific, measurable goals incorporated in tenders and contract papers (see [2.1.](#)).

Follow up

Staying in contact with former participants and collaborators, especially participants and companies or the labour office, is useful and should be an integral part of the committing processes on part of the training institution. These contacts provide information used for evaluation as well as for detecting new economic or organisational trends and training needs.¹⁹¹

Placement

After course completion it is important that the participants are accompanied along their further career paths by the institution which provided the vocational training; otherwise it is possible that the acquired vocational orientation is lost.

Placement is defined as an effective instrument of labour market policy. It facilitates the transition from the vocational training system to education and consequently to work by means of special services and support. Placement means successful employment of unemployed people by an appropriate company.¹⁹² If the participant has a shortage of further qualification, in order to become employable, it is necessary that to ensure that the participant attends his/her specific educational training before placement.

Placement shall therefore pursue the following objectives:

- "Supply-to-demand" matching (Which job corresponds to which qualification profile of which participant?)
- Information for companies and job-seekers
- Analysis of qualification demand (Which further qualifications are needed by the participants?)
- Organisation of further education possibilities if necessary
- Support in the transition from unemployment to working conditions (coaching, work placement)

In this respect at the stage of placements the training institution develops a set of rules concerning:¹⁹³

- contact with companies offering internships and job vacancies
- description of goals/tasks for the participants
- cooperation/guidance during the period of placement
- placement – whether it meets the participants' requirements: an individual educational plan developed by the company together with the training institution supports the matching.¹⁹⁴

¹⁹¹ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 31.

¹⁹² See: www.move-ment.at [29.06.2011]

¹⁹³ See: Foster, Helga / Gutschow, Katrin (1999): E-Quality in Vocational Training. A Handbook, BIBB (ed.), Bonn, p. 25.

The training institution should consult and support the company offering placement before, during and after the placement.

Placement should embrace the following steps:

- **Identifying work areas of participants' interest**

It is important to look for evidence of interest, in order to guarantee that the participants are motivated to find an internship/a job. Generally, the participants have identified the skills that they enjoy using and which they would like to use at work during the vocational training. The participants with the tutors' support should then determine whether their interests involve contact with people or not, whether they like to be in a large or small group of people. The participants should also analyse past jobs and roles they have led to get an understanding of what captured their interest over the years. Afterwards it is necessary that the participant with the tutor's support thinks broadly and asks him-/herself: What organisations/ companies exist to support those interests, issues and concerns? It is recommended to put down every one they can think of against each of the participant's interests, even if it does not concentrate exclusively on his/her interest. E.g., What do they do? What support networks do they have? Can they use the participant's skills, interest and knowledge?

- **Which qualifications are required for that job?**

Employers seeking people with certain qualifications may set a standard for new recruits so that they could know if they have sufficient knowledge and skills to do their work with competence. The next stage is to find out more about the areas of work of the participant's interest. Of key importance will be the job opportunities in the participant's local area. There are plenty of places to look for information about a company which attracts the participant. Through literature research (company literature), internet research, press research and review of professional or trade magazines the participant as well as the tutor will keep up to date with current trends in the chosen career area. Furthermore reading job listings in newspapers is important for knowing the required qualifications well, because then the participants will be in a better position to spot which qualification is missing. There maybe several competitors hunting for a job. It's worth doing thorough research (analysis of job vacancies). If the participant would like to undergo a certain course to make a career in a certain field, it is necessary to find out whether the college sets any restrictions (age, level of education, etc) for that particular course or whether the costs are too expensive. Participants should be counselled in looking for an appropriate course. It is recommended finding an appropriate time for special discussion of the matter with the supervisor or counsellor.

- **Getting qualified** (matching of qualification)

If there is a lack of certain qualifications, the participant should undergo a qualification course after accomplishing the vocational training. When the time period between vocational training and further education is too long, dissatisfaction starts to creep in – boredom, frustration. To avoid this the participants should act decisively before their performance is affected.

- **Job placement**

At this stage the supervisor or counsellor tries to find a suitable candidate for an employer. Training institutions may have a lot of people on their training programmes, who may suit the

¹⁹⁴ See: Bundesinstitut für Berufsbildung (1999): Anforderungskatalog für die Qualität der von der Bundesanstalt für Arbeit geförderten Weiterbildung, Anlage 4a: Balli, Christel / Harke, Dietrich / Ramlow, Elke (2000): Vom AFG zum SGB III: Qualitätssicherung in der von der Bundesanstalt für Arbeit geförderten Weiterbildung – Strukturen und Entwicklungen, Bonn, wbv Verlag, p. 31.

position available. Either the training institution will get in touch with companies directly or the companies get in touch with a recruitment agency which tries to connect vacancies and unemployed people. Many small and medium-sized companies may involve a recruitment agency in the search for suitable staff, partly because recruitment agencies know all about employment laws and will help them avoid many legal pitfalls associated with recruitment.

Besides this personal initiative is required. By talking to people the participant learns who works in the field he wants to work in, he can use the own network, read job listings, make use of the local press – as source of information on the jobs available – and even take the initiative in contacting employers, which is an effective method of job hunting. The supervisor should point out that there are many ways to find a job. Furthermore the counsellor should mentor the participants in which aspects they should focus on when seeking and applying for a job. E.g. Perfectly written letters can impress employers and are more likely to create a response. Can you make up a winning CV? etc.

Conclusion: Participants should not be left on their own when looking for an adequate (further) educational course and hunting for a job. Placement needs support.

5.7.4.2. Exercises

Individual exercises:

1. Contrast control of success against external evaluation in 3 sentences.
2. Name at least 5 indicators for control of success of a vocational orientation measure. Which others can you name?
3. Imagine it is your task to evaluate the success of a vocational training measure. What problems are you anticipating and how would you deal with them?
4. What kind of steps should placement embrace?

Group exercises:

1. The “self selection” of responding participants is a problem when assessing the success of a course. What could be done to guarantee a higher reflex of questionnaires or higher interview compliance?
2. Think of “Matching of targeted and actual group” as an indicator of success. What problems do you anticipate in measuring this indicator? And how can they be avoided?
3. In practice the most important aim of training institutions is often to place as many people as possible on the labour market. Another important aim is to meet the expectations of the participants. Sometimes these goals conflict with each other. Discuss in which way. Which problems can arise in this connection? Discuss the main points and argument your view.

5.8. Glossary

Assessment Center

This term names an employee selection method for assessing aptitude and performance of potential employees. It is applied to a group of participants by trained assessors using various aptitude diagnostic processes in order to obtain information about applicants' abilities or development potential.

Assessment Criteria

Call for tenders guidelines shall meet several requirements and tasks. For this purpose a quality criteria catalogue for the contracting bodies has been developed. These quality criteria are a mandatory framework for the tenders. The verbalised criteria should provide and facilitate an objective and transparent comparison and examination of different offers. Assessment criteria are a guideline for the assignment - and orientation process for the contractor and provider, offering an arrangement structure for the content, determining the implementation process and are at the same time an assessment tool to evaluate the success of a measure.

Benchmarking

Benchmarking is a concept improving an enterprises opportunities by comparing several enterprises, programmes or processes. This approach should discover strengths and flaccidities of an enterprise, a project or programme by assessment of certain indicators, which are applicable to measure the respective activities. Subsequently it is possible to initiate an improvement in quality and performance.

Best practice

Are programmes and processes that come off best after a success control (e.g. benchmarking). Consequently best practice models could be adopted to achieve a quality protection or enhancement in similar projects or programmes.

Competence analysis

Competence analysis is dealing with the question, how participants could systematically be urged to transform abstract requirements into concrete competences. The intention is to analyse the competences that are acquired outside of formal qualification and to elicit their potential for development. Primarily the competence analysis should give information about social competences (e.g. conflict management) and accordingly methodical skills (e.g. communication skills, presentation skills) of the participant.

Competence balance

In reference to Ruedi Winkler "competence balance" contains both informal and formal competences and describes them clearly arranged.¹⁹⁵ Because the acquirement of competences is often occurring unconsciously (particularly if not accredited), the competence analysis wants to collect all competences that are acquired in the course of life (e.g. mediation, organisation, creativity, etc.).

¹⁹⁵

http://www.abif.at/deutsch/news/events2005/Erfahrung_einen_wert_geben/erfahrung_einen_wert_geben.asp

Connection-learning

The goal of connection-learning is to adapt contents of learning in that effect that newly learned contents can connect with existing contents and could be used in a way relevant for daily practise.

Control of success

Control of success is the main goal of evaluation. Next to the control of qualification of an institution (mostly fixed by criteria of tender) the contractor claims for a direct control of the success of an institution. Thereby the input (finances, qualification) as well as the output (placement rate) will be checked.

Delphi-method

The Delphi technique is a scientific method for obtaining forecasts from a panel of independent experts over two or more rounds. Thereby experts give interviews on their valuation and forecasting of specific problems. In the first round the experts opinions are collected and summarised to an average, which is put forward for discussion in the next round. The conclusions contribute to scientific founded forecasts, decisions and planning. The anonymity of the experts is appropriate to prevent interacting of experts during the expression of their opinion.

Demand and Needs analysis

The planning of training measures has base on an analysis of the local and national labour market demands, of the demands within branches and/or of certain enterprises. Conclusions of demand and needs analysis should be used to develop adequate training measures for target groups and to provide access to different or new occupational fields.

Dropout and failure rate

This rate is calculated by the number of participants that started a measure divided by those who finished the measure.

Educational structure

The educational structure provides information about the educational background of the population. Subdivided into different characteristics the educational background on international, national, regional or local level can be analysed. Statistically surveyed characteristics are highest educational level, state of employment, branches, age, gender, etc. Educational disparity mainly arises in the context of unequal access to cultural, social and financial resources. Statistics of the educational structure could be pulled up as basis of decision-making in the labour market and educational policy measures.

Employment structure

The employment structure provides information about sectors and conditions under which groups of the labour force are working. Criteria containing the analysis of employment structure are the sector, national and local distribution of employment to the different branches, age cohorts, income groups, educational backgrounds, belonging to gender, etc. Need for action in economy, labour market policy, budget policy (e.g. social insurance) and in other labour market connected fields could be deduced from the analysis of these criteria.

Ethical codes

The moral responsibility when conducting a training rests with the conducting bodies. Ethical codes in this context mean an esteeming position towards participants. The social and

vocational equality of people with different level of living (gender, origin, etc.) has to be at the centre of moral responsibility.

Evaluation

Evaluation is a process using empirical research methods for a systematic analysis and appraisal of processes, measures and interventions in an organisation and/or a system. The evaluation of measures and goals can take place at different levels of a system. It can be targeted to the management, but can also be concerned with the training or the overall results. It can be realised by third parties (extern) or by institutions and parties directly involved in the training measure (intern). Evaluation can also be adopted to accompany a programme or process (formative) or at the end of a specific programme or process (summative) to provide information on the product's efficacy.

Feedback

Feedback is used to mark the difference between self-perception and intercultural perception in order to reduce "blind spots" regarding the own person.

ICT- skills

ICT is the short term for "Information and Communication Technology". Thus ICT-skills refer to new media like computer and internet. These skills are almost belonging to cultural skills of our time like reading, writing and arithmetic and should therefore also be encouraged broadly. This can be achieved through targeted use of information and communication strategies.

Informal acquired skills

Informal acquired skills are qualifications not normally accredited by education or occupational qualification. The informal skills of an individual could get acquired in different fields (e.g. workplace, family, trade union, youth organisation, etc.). The learners don't notice these skills as enhancement of knowledge because the learning process happens along the way of their everyday life and is recognised as natural concomitant.

Intern and extern key personalities

Intern key personalities are those parties involved that are directly participating in a measure and responsible for the execution (e.g. managing staff of the training institution, trainers and participants). Extern key personalities are those persons that are acting in the environment of a measure. This means that they commission the measures, provide standards for the realisation of measures and/or assist the executing institution at the infrastructure (e.g. contractor, social partners, enterprises). Because of the big number of key personalities acting within a measure, the interests could sometimes be inconsistent with one another.

Intervision

"Intervision" is naming a cooperative form of consulting that provides the opportunity for trainers to interchange their individual experiences. Intervision is a form of group and team supervision without professional supervisor and without hierarchical differences. The coequal colleagues are looking for the best strategy solving a problem.

Job changing behaviour

Job changing behaviour means the transition between different phases in the labour market. Persons could be occupied (full- or part-time), they could be out-of-work or in an atypical work arrangement (marginal employment, fake/false self-employment, etc.).

Key personalities

The system of vocational orientation contains key personalities who have substantial differences in their interests and goals but together exert big influence on the system of vocational orientation and activation and contribute to the maintenance of the system. Key personalities could be classified in external clients (contractors), internal clients (participants), managing staff of the training institution, trainers, and social partners. The role of these parties involved has to be defined precisely to conduct appropriate quality management.

Key qualification

Key qualifications are naming universal qualifications playing a role in human resource development (e.g. linguistic competence, computer literacy, etc.). Key qualifications could be divided in four competence fields: social competence, methodical competence, self-competence and action competence. Key qualifications should facilitate a professional and active dealing with knowledge. They are reflecting the ability to adopt and transfer professional competence.

Labour market demands

Previous to the identification of labour market demands we have to analyse the current situation of the labour market. Quantitative and qualitative descriptions and analysis of the relevant enterprises industries/cluster/branches as well as national, local and sectoral studies and data on the labour market are essential in order to provide an overview of economic and technological trends for the exploration of labour market needs.

Labour market hierarchy

Labour market hierarchy means social inequality that is noticed in a societal context and carried forward to the labour market. Attributes like gender, age, nationality, etc. are possible indicators of labour market hierarchy.

Learning agreements

Learning agreements affect different levels in the (further) vocational and educational system. Learning agreements could treat conceptual goals and measures, defined by the contractor. At the same time they are necessary to pick out the individual learning goals of participants as central themes and to enable the participants to take responsibility for their own learning process. The aim of learning agreements is the determination of individual learning goals for both parties (trainer and participants). So the participants are enabled to take responsibility for achieving their aims and for delivering their expectations.

Measurable goals

Are those goals that are featured with measurable indicators to allow quantitative measurement of objectives. They are used as measuring instrument and as fundament for a marking and evaluation policy.

- "Hard" Goals

Measurable indicators of hard goals could be placement rate or drop out rate of participants and the number of participants with improved qualifications (certificate).

- "Soft" Goals

Soft Goals are aiming at social and individual competences of participants. Competence fields like self-perception and conflict perception, self-assessment and reflection are possible soft goals.

Measures of vocational orientation and activation

Are containing all measures aiming at the (re-)integration into the labour market. Specific target groups (e.g. long-term unemployed, re-employed, older unemployed, migrants) are positive encouraged by providing training measures. This includes information about existing jobs, tutorials for job interviews, familiarisation with a daily routine, etc.

Monitoring

Monitoring is standing for observation and control of enterprises, projects and processes. Data collection is occurring via technical instruments (e.g. questionnaire, interviews, computer inquiry, etc.). Accordingly data get evaluated – mostly with quantitative methods. If a process doesn't take the favoured course, it is possible to correct this development by means of monitoring.

Needs of target groups

Related to the several target groups of participants within a training measure, the existing needs can differ a lot. The goal is to consider the different starting positions of participants (e.g. older employees, migrants, low qualified workers, etc.) with the aid of an aimed analysis of needs.

Parties involved

Parties involved in the system of vocational orientation are all persons who take part actively in realisation and success of training measures. For example: contractors, providers, trainers and participants but also entrepreneurs and labour market experts.

Placement

Placement means the integration of participants of training measures into the labour market after or already during a measure.

Quality management

Quality management (QM) aims at improving continuously intern and extern communication processes, work sequences as well as products/services of enterprises. Furthermore vocational training of employees, the employees' satisfaction with the workplace, etc. are also ranking among internal quality management. All over Europe standards of QM were established (ISO and EFQM) to guarantee universal quality assurance standards.

Quality systems

The quality system is standing for a system delivering guidelines and instruments for performance measurement and enhancement of measures in training institutions. This could occur on an individual level (staff, trainers, participants) or on an organisational level (e.g. premises, time management, etc.) as well. Quality assurance programmes follow the aim of changing sequences of a system by intervention and consulting. The quality assurance programme of education and further education system is treating with planning, implementation and management of training institutions.

Sitting in on lectures / Hospitation

Originally the term "hospitation" means sitting in on lectures of qualified employees at the end of their pedagogic education. In the vocational training and further education the term is used to name a process of expanding knowledge and reflect one's own methods. The consulting aspect takes the centre stage.

Skill management

Skill management is terming a targeted human resource development policy that provides long-term professional development of employees by systematic use of further educational measures.

Soft Skills

Soft Skills or “social competencies” are covering a complex of personal abilities and settings that facilitate the transfer from individual to collective orientations of action (e.g. ability to deal with conflicts, compliance).

Standardised quality assurance programme

A standardised quality assurance programme enables to compare by the use of a scheme of analysis and measurement and to be geared to quality standards at the system level.

System level

A system’s characteristic is that it is stabilised by numerous factors. In a system parties involved are interacting within structural basic parameters. In the field of vocational orientation and activation system- and meta-level is responding to the level of the scheduled trainings institutions. QUINORA also includes the ordering party (e.g. employment agency) in the system- and meta-level of vocational orientation and activation. Cooperation at system level refers to cooperation between important parties involved in the overall system: participants, trainers, scheduled trainings institutions and ordering parties. The quality of this cooperation, which in practice often turns out to be difficult, is affecting – so the hypothesis of QUINORA – the quality of an accomplished measure as well.

Training Design

The Training Design should include content, legal and organisational criteria of a training measure defined by the contracting bodies. The goal is to describe concretely the appearance of measures appropriate to the requirements of the contractor.

Vocational orientation

Vocational orientation is a process of weighing occupational alternatives against the background of one’s own facilities, competences and preferences. The decision for a profession is influenced by the labour market, the family situation, gender concepts, etc. Vocational orientation doesn’t happen at a selected point of life, but is a process which could take years and does not have a natural end.

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