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Attwell + Baumgartl [ ed.s ] = Creating Learning Spaces | 9 |

Graham Attwell + Bernd Baumgartl [ ed.s ]

# Creating Learning Spaces: Training and Professional Development for Trainers

This book reports on the findings of a six country European project on the training and professional development of trainers.

The project looked at who was delivering training, at the practice of trainers and how their work is changing.

It examined opportunities for training and professional development and support for trainers in their everyday work.

The project went on to develop a flexible framework to support the different needs of trainers for professional development.

The framework is based on a series of principles and commitments for individual trainers, for groups, for enterprises and for other stakeholders involved in training.

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**Graham Attwell + Bernd Baumgartl (ed.s)**

*with*

**Magda Balica; Eduardo Figueira; Philipp Grollmann; Pekka Kämäräinen;  
Ineke Lam; Äli Leijen; Eileen Lübcke; Nikitas Patiniotis; Lianne van Elk**

## Creating Learning Spaces: Training and Professional Development for Trainers



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## INTRODUCTION

### TTplus

**TT+ (2007 – 2009)** is a EU Leonardo Reference Material project on vocational education and training (VET) to examine the issues involved in the **training and professionalisation of trainers** in the European Member States. The key actions of the project are to examine the contexts in which training takes place in enterprises, present policies and provision for the training of trainers, **develop a framework for the continuing professional development** of trainers, examine different measures and mechanisms for implementing the professional development framework, develop a series of portraits of training roles and professional development pathways, and explore articulation and linkages between the Framework for **Continuing Professional Development and the European Qualification Framework**.

The book presents short essays with TT+ findings from a number of different research methodologies including literature analyses, study and meta-analysis of regional, national and European studies, projects, reports and initiatives, surveys, consultation with experts, institutions and other organisations, research seminars, case studies and use cases. In particular, a learned-centred approach has been chosen. Rather than collecting information via the usual national case studies, the innovative project method investigates **cases of practice** in several EU countries, which allow for the identification of **instances of change**, for the description of **examples of innovation**, for the abstraction of **scenarios of practice**, and for the development of **use cases**. This is being undertaken in parallel with innovative conceptual work on **visualisation of experience, practice and policies**. A variety of outputs emerged during the duration of work, culminating in a proposal to formulate a Europe-wide **framework for professional development of trainers**, based on the current practice, on the trends emerging, and on the desirable role of EU policies in VET.



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# CHAPTER 1 - THE CONTINUING PROFESSIONAL DEVELOPMENT OF TRAINERS

## Graham Attwell, Pontydysgu

The developing impact of Lifelong Learning has led to ever wider contexts and processes of learning, including the increasing focus placed on non formal learning, work based learning and e-learning. It may also be surmised that such changes in the forms and processes of learning are leading to new and changing roles for trainers. Despite considerable research at European and national level into the role and training of vocational teachers (see for instance, Cort, Härkönen and Volmari, 2004), there have been few studies into trainers, outside vocational schools.

The European Commission, Lifelong Learning Programme funded, TT-Plus project has examined the changing role and practice of training with the aim of developing a Framework for Continuing Professional Development for trainers.

The project was based on a number of initial hypotheses.

The primary hypothesis was the diffusion of the training process, with increasing numbers of people taking some role in training as part of their occupational profile. At the same time, professional trainers have gained new roles and responsibilities.

Secondly, the project suggested traditional structures and systems for the training of trainers have failed to keep up with these changes. Previous studies have shown that training of trainer provision is inconsistent and fragmentary (Brown, 1997). There exists no European framework for the training of trainers. Present provision fails to take account of people who may have a responsibility as experts for coaching novices or for peer coaching etc.

The growing recognition of the importance of lifelong learning places an increasing focus on training and the development and recognition of work based learning. E-learning offers new opportunities for the training of trainers. At the same time the adoption of the European Qualification Framework may offer opportunities for the development and implementation of a common European intercultural Framework for Continuing Professional Development for trainers and those with responsibility for training as part of their job.

The main aim of the project was to develop a Framework for Continuing Professional Development for trainers. However before developing such a Framework, research was required both to validate the hypotheses and to explore further the changing roles and practice of trainers. Prior to the project there was little verified knowledge of the extent to which the training function is presently spread especially within the workplace. Neither was there knowledge of the effectiveness of existing training-the-trainer provision.

One major challenge for the TT-Plus project was to develop a methodology for the transnational study of the changing practice of trainers. Previous studies in this field had adapted four approaches (or combinations thereof):

- a) Comparative studies based on training of trainer programmes and measures (e.g. CEDEFOP 2006)
- b) Questionnaire based surveys of training roles (e.g. Van Nijhof and Rijk, 1997)
- c) Attempts to develop common competency bases for trainers
- d) Case studies of trainers.

All these approaches have their strengths. However they are also problematic. Much (if not all) of the previous work has focused on full time trainers or those with training as part of their job title or official role. If our hypothesis that the training function has spread and includes many for whom training is only one part of their work was true, then these studies are likely to have missed these trainers. Furthermore, most surveys have been based on mailing lists from various organisations responsible for the recognition or registration of trainers - e.g. the Chambers in Germany or Professional Associations such as the CIPD in the UK. In neither case would such mailing lists be likely to include 'part time' trainers.

Furthermore, attempts to develop (transnational) competency bases or taxonomies for trainers are very likely to rely on 'expert' opinion as to the role of trainers and once more are based on the expertise of those from professional or sector organisations, examination and validating or regulatory bodies. These are focused on formal learning and curricula.

Most comparative studies are based on the comparison of paradigms. As such they seek out what is different in different countries. In terms of training the trainers this leads to a focus on regulatory and qualification systems.

Alternatively case studies have been used to investigate a particular aspect, or paradigmatic element, of the practice or work of trainers. For instance there have been studies looking at different pedagogic approaches to training or the differing use of ICT by trainers (see, for example, Jung, 2005).

Whilst paradigms are interesting in an international context, they may conceal different trends and developments, particularly changes within the existing systemic paradigm.

The European Centre for Vocational Education and Training, Cedefop, has recognised the complexity of studies into training. Challenges for comparison include:

- multiple stakeholders,
- diverse and complex working areas, and
- similar linguistic terminologies but different understandings of key concepts (for instance who is a trainer?)

(Schmid, 2005).

Yet none of these different approaches to exploring and comparing the work and role of trainers look at what the trainers do - at the practice of training. In order to explore the hypotheses advanced in the initial TT-plus project application, it was necessary to focus on the actual practice of training. This both allowed us to develop an understanding of the meaning and different dimensions of practice and the development of a shared (meta) language to describe such practice.

The empirical work undertaken by the project also allowed us to analyse what we called the 'dimensions of practice' and the 'instances of change', capturing the dynamic of development of practice by trainers in enterprises in the different countries represented by the project partners.

This work was followed by an analysis of existing policy frameworks and practices in the Continuing Professional Development of Trainers. What policies were being enacted, what provision was presently available, were there national or sector frameworks and what future developments were being planned?

In our original project application we had stated that a Framework for Continuing Professional Development was intended to be both flexible and inclusive. It should be possible to adapt and implement such a Framework in different cultures and sectors. The Framework would be based on a series of commitments addressed to all those involved in the training of trainers, including the trainers themselves, enterprises and social partners.

The project partners developed a series of different commitments for these involved along with exemplars of actions which could demonstrate progress toward such commitments. It also produced a proposed accreditation scheme for the Framework. This resulted in the development of a consultation document.

In spring and summer, 2008, project partners undertook extensive consultation through focus groups and interviews with trainers, enterprises, professional organisations and policymakers over the appropriateness, desirability and possible implementation of the framework. The results of the consultation were overwhelmingly positive.

A number of further studies were undertaken by the project. These included a report on equal opportunities for trainers, driven by our desire that any Framework be inclusive. A second study looked at the possible articulation between the TT-Plus Framework for Professional Development and the proposed European Qualification Framework (EQF).

The final activities undertaken through the TT-Plus project were the production of a roadmap and sustainability report. These documents outline possible future developments and ways forward in testing and implementing the Framework in practice.

The results of the project have been published on the project web site and presented at a number of national and international conferences. This book is designed to pull together the major outcomes of the project within one publication. It is hoped it will be of interest to researchers, training managers and practitioners and policy makers concerned with the training of trainers and the quality of education and training.

Chapter two of the book examines the outcomes of the empirical research. Chapter three presents the results of the analyses of existing policies for the training of trainers. Chapter four provides the Framework for Continuing Professional Development produced by the project. Chapter five reports the results of the consultation process. Chapter six examines articulation of the framework with the European Qualification Framework. Chapter seven looks at Equal Opportunities for trainers. Chapter eight sets out our roadmap for future development.

The book is a collaborative development by the project partners. Although different chapter editors are indicated, in truth the work is the results of a collective effort in discussion, reflection, research and development.

## CHAPTER 2 - EMPIRICAL STUDIES IN THE PRACTICE OF TRAINING

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### 1. Understanding Practice

In contrast to the advanced and detailed knowledge that exists about the work of teachers, training practice (in work processes) is still an under-researched black box. The TTPlus project based its empirical research on a central hypothesis: that the contexts in which training takes place are becoming more dispersed and accordingly, more workers are taking responsibility for the training function, although often this does not form the main role in their job description, neither is it their main work role. The central aim for the project was the development of a framework for the continuing professional development of trainers. This Framework was intended to be inclusive and flexible and open to all those with some responsibility for training, whatever their official job designation. The empirical exploration of the practice of trainers was seen as a key element in making informed suggestions on such a framework.

In seeking to focus on practice it was necessary to consider what dimensions of practice that would include. We were particularly concerned to focus on the routines of professional work, of the embodied knowledge of day-to-day work.

We can distinguish 3 different meanings or understandings of practice:

- Practice as embodied knowledge;
- Practice as a skilful performance with artefacts;
- Practice as implicit knowledge, as the implicit logic of doing things (Reckwitz 2003).

A further consideration was how to capture such practice. The project adopted an approach which has been called the "informant ethnograph" (Kalthoff 2003) focused on the verbal explanation of the person who performs the practice. We also adopted an approach based on gathering participant narratives through storytelling of their practice and designed a semi structured interview procedure for this purpose.

However, we were also aware that there are multiple narratives in the process of training. The narrative of a trainer around an aspect of their practice may be very different than that of a trainee. For that reason we decided to interview not only trainers, but also trainees and managers in enterprises. We were particularly concerned not only to capture possible

tensions in these narratives, but also to focus on the instants or dynamics of change in practice by trainers.

Whilst we had stated in our project design that we would examine the practice of training in 18 enterprises in six countries – the UK, Germany, Romania, Greece, Portugal and the Netherlands - we did not specify in what sector these companies would be based nor the size of the enterprises. After some discussion, it was decided that rather than target any particular sector, we would rather aim to have a wide spread of case studies in different sectors and with different models of organisation of training. Our approach was not that of undertaking a comparative study, but rather to gather as rich a picture as possible of the diversity of training practice. The case studies did indeed provide us with extremely rich empirical data. This led to a further issue of how to organise and report on our findings, especially bearing in mind our aim to develop a common Framework for Professional Development. This chapter looks at some of the considerations in analysing our findings and then goes on to examine some of the results of the case studies.

## 2. Some basic constituents of the practice of training – a double practice orientation

Whilst ethnographic paradigms often do justice to the complexity of practice, they can end up in a doubting of reality. Thus the project needed an analytical framework that could to bring the strengths of the ethnographic approach to the forefront. The connection between methodology and the overarching questions and hypotheses had to be established in order to show that the empirical findings had more than anecdotal or phenomenological value. Such a framework needed to provide criteria for the selection of empirical instances as well as for their interpretation. At the same time it needed to be lean enough to acknowledge the local contexts in our transnational and cross sector design and actual problems and strategies for how to cope with them. This is not seen as conflicting with the desire to focus on actual practice. But it does require some further elaboration.

'Practice' carries two meanings with regard to the reality of trainers. On the one hand the trainers themselves can be regarded as experts on learning and training at the workplace. On the other hand workplace trainers are experts on the 'local knowledge' of work processes, tasks and functions. Trainers exhibit, develop, transfer and convey the knowledge useful at work, the so-called work process knowledge (Boreham, Fischer and Samurcay, 2002).

This double practice orientation of training has repercussions for the way we can look at the question of to what extent the existing mechanisms and content of training-the-trainer provision, professional development and support are aligned with the needs of those supporting learning within the workplace. How far do existing training-the-trainers provision, policies and practice and processes of recruiting trainers correspond to the 'internal logic of training' at the workplace?

Based on these overarching questions we need a common understanding of the elementary constituents of the process of professional development. In principle, it can be analysed according to different stages and with regard to different levels of analysis.

A generic model of stages would distinguish at least the following elements:

- Pre-training biography/experiences;
- The everyday practice of learning support;
- Changes and developments with regard to this role (expansion in terms of content or time; promotion etc.).

In order to be able to make later use of the different case studies across the project, the project adopted this generic model. In order to develop the project findings into the direction of a framework for professional development it was necessary to focus on individual trainers' competences, attitudes, skills and abilities to support the learning of workers. However, since training takes place in the immediate context of work organisation and its constraints, it would be wrong to only look at the individual trainers' dispositions, skills and abilities. Thus, an examination of organisational practices and the interaction with learners is also needed (Eraut, 2004). This is the context in which those individual determinants can be accentuated. The focus on the trainers' role and practice and its development is necessary, since otherwise we might risk merely producing general findings on the quality and processes of learning in work processes or on organisational developments as regards to learning at work, where others already have done better (e.g. Argyris and Schön, 1999; Boreham, Fischer & Samurcay, 2002; Fischer, 2000).

Ultimately, the goal for our project was to identify typical problems and challenges (across the different contexts of our study) that workplace trainers encounter during their professional development. Such problems can be seen as the major incidents in stimulating professional development. Strategies for how to cope with these problems could then be taken as indicators to be looked at in a later stage of the project as elements of a professional development framework.

The preliminary findings of the project indicated that despite the various possible reasons for national, sector or other kind of differences, such problems had many common features. This was especially so with the dynamics of change in the practice of training.

### **3. The findings of the case study: an overview**

#### *3.1 Pre-training biographies and experiences*

We have drawn attention above to the dualism in the role of trainers as experts on learning and training at the workplace and as experts on the 'local knowledge' of work processes, tasks and functions

It was remarkable that of few companies studied required formal qualifications in training for new trainers. Two companies, both German, did demand formal certification in didactics from their trainers. In other companies, also German, there were full-time in-company trainers who are skilled workers with a formal training for trainers certificate (the AEVO certificate) or for the industrial Meister qualification.

In eight of the cases, mostly training institutes, competence in didactics or pedagogy was seen as important and four of the companies expected that their trainers have an educational (pedagogical or didactical) background and experience in providing training.

Education or qualification in a specific occupational area was seen as important in eight of the cases. In one case, the company made no distinction between skilled workers and trainers. All skilled workers are expected to take over some training functions as mentors supporting trainees. There is no pedagogical training to support them in this role. In three other cases the trainers are managers who undertake training as part of their job.

Some of the trainers had participated in a training-the-trainer seminar programme prior to taking up their job. Others had prior experience of teaching. But some were simply selected by their employers who saw them as capable of fulfilling the role of a trainer. In some instances companies had hired occupational specialists with prior experience of undertaking training in order that they might provide training if necessary.

### *3.2 The everyday practice of learning support*

We will firstly look at teaching and learning practice in those companies which were not specialist training providers. The main method of training in these companies was workplace learning. Every company used workplace learning for the induction of new workers. Trainees are integrated into the process of work and they are given real working tasks (or support tasks) as their learning assignments. Some companies organized a rotation system requiring the trainees to move between different teams or departments. This could be for short periods or for a longer period of time. In one enterprise, trainees changed from one team to another every half year. Following experience in each department, trainees could request which team they wished to join to complete their training.

In other cases initial training was restricted to one team or department. One manager explained the process as follows: "we place a mentor next to our new employee. This mentor is the person who will actually adapt him in the department he will work". The mentor is responsible for a long period for the new employee and he "tries to instruct all the subjects of values, concepts and culture of the company and the tools the employee will need in order to complete his job tasks successfully".

In some cases workplace learning was used for continuing vocational training for experienced workers. Team leaders organised meetings to discuss work related issues. In one case, informal team meetings were organised daily with more formal meetings on a weekly basis. In another case, the team leader met each team member individually on a weekly basis.

In three of the case studies, internal courses were provided for prospective and permanent employees. One company offered extensive training course provision, mainly focused on financial administration. This theme had some 12 topics and for one topic there were between 60 and 80 training courses available at different levels. Training was provided by part-time trainers employed as professional experts. Each training course uses different methods including e-learning and face-to-face meetings. The training is based on learning objectives and the trainees have to apply the learning content in a real situation. Trainees also develop case studies.

Three companies offered external courses for workers. In one of the case studies, technicians can either participate in training courses in their own country or in courses in other countries suggested by international partners. The company also offers scholarships for two employees a year to study for a Masters at university. Both group and individual problem-oriented training is provided.

A further group of case studies were focused on training providers, in both the public and private sector. Three of the four public sector providers offer broad and largely traditional training courses. One provider admitted that its training was very theoretical but planned to increase the practical element to 40%.

One of the private training organizations provides training on personal and organisational development. This is available for companies and for free public enrolment. Every course has a “comeback day” in which the transfer of the training in practice is an important subject. Several courses have been accredited for Bachelor and Master degrees; others are accredited by international organisations. Recently, a Virtual Learning Environment (VLE) was incorporated in the training courses.

Six of the training organisations provide courses in specific subjects or to specific target groups. Four provide subsidised training courses including for unemployed people and for community development. One provides training courses for civil servants and another to professionals in healthcare.

One of the courses was based on informal learning, observation of behaviour and mentoring with trainees using log-books to report about their learning experiences. In another, also based on informal learning, the training course is organised through an action learning set, individual coaching, and mentoring. Others were more focused on traditional formal training.

One training provider was offering online training courses using a blended learning environment and another accredited seminars.

### *3.3 Changes and developments*

The case studies revealed a picture of dynamic change and development. This section looks at the main changes discussed in the case studies.

#### **Lifelong learning**

Many of the companies included in the case studies were seeking to extend their training provision. In some cases this included extending access from just technical staff to all workers. In other cases it included extending from initial vocational training to providing continuing vocational training. These plans had implications for trainers as resources were often limited and was partly responsible for a move towards more work based learning.

#### **Broader learning pathways and work based learning**

There was a marked trend in a number of the case studies towards broader learning pathways. This was leading to a reassessment of traditional forms of training. One trainer said: “Most training assumes that there is a gap of knowledge and filling that gap is a pointless exercise. I can move from incompetence to mediocrity, but it cost far less effort to take the things I am good in it and move them to become excellent. Normal training is based on the wrong model, it is based on a deficiency model”. The answer, he felt, was to provide mixture of group learning, coaching and project work.

Another trainer said: "Training is not always the solution. We have to think of broader learning paths in which trainers are also facilitators and guides of learning processes. To what extent is a trainer a type almost vanished? A trainer needs to be versatile".

Some of the trainers felt their role was changing. One talked of a trend towards "more long lasting and flexible training courses", going on to say that "therefore, the function of a trainer is changing more to a guide and coach".

Another explained that broader learning paths are needed to develop closer relationships between the employees, to understand the company's culture, and for better integration into working groups.

Six of the case studies raise the issue of the transfer of theory into practice. In all the case studies undertaken in Germany, respondents emphasised the growing importance of learning in real work contexts and learning from real working experiences. In some cases, the growing importance of work-related learning may lead to more intensive cooperation between different learning venues. In other cases, the same driving forces may lead to the marginalisation of such cooperation.

The issue of transfer to practice arose both at the level of the individual (what does this mean for me in practice?) as well as the organisation (what does this training mean for the organisation?). Trainers are trying to relate to the context and workplace of the trainees. One trainer formulated the problem with training courses outside the workplace as follows: "It is away from work context, HRD people pay to get people into a classroom and afterwards, the knowledge will be used or not, but everybody comes from a different work culture even within the same company, and what is taught in the course might be from another and different culture". In this case, they are now attempting to link the training back to work practice and to stimulate organisational and cultural change. Line managers and executive managers are also to be invited to participate in the first workshop on the course and to write a report at the end of the training programme.

### **Mentoring and informal learning**

In some cases mentoring is seen as a basic part of a training programme. But for others it was a new activity.

In two of the organisations studied, managers provide mentoring for employees.

Mentoring was also linked to informal learning and to just in time training activities developed by skilled workers. In two cases. These approaches were said to be based on informal communication, common sense solutions and 'fit for purpose' training, delivered when needed.

In one organisation, with a strong training culture promoting non-formal learning, the organisation is developing a cascade training strategy through training unit managers who then train the workers in their team. The company has developed a pool of unit managers able to provide training when and where is needed. The policy is to reduce the importance of the training department, and devolve training activities to unit level. They believe this approach will reduce costs and increase the effectiveness of training.

## **E-learning**

Many of the companies in the case studies talked about e-learning and distance learning, even if they were not all yet implementing it. One organisation was using blended learning - a mix of different learning methods including e-learning. Distance learning was described by one company as a 'selling point'. It was also seen as being environmentally friendly and avoiding traffic jams. One trainer talked of developing 'carbon neutral courses'. Parts of the course will be offered on-line through a VLE and through coaching using the internet.

In other cases the integration of ICT in courses was seen as important, especially as it is being increasingly used for communication in business processes. Online courses could also provide training on a large scale and to geographically dispersed learners. For the trainers, this not only involved learning about technologies but also new approaches to facilitating learning.

## **Self-directed learning**

Another significant trend was the growing importance of self-organised learning. Whilst in the past, training was more focused on organisations and companies there was now more focus on individuals. Individual employees were being given more responsibility in companies and were asking for more learning support.

Shorter, faster just-in-time training

Shorter training courses and more intensive programmes were seen as a response to heavy work loads and shortage of time. One response was 'block seminars' designed to provide intensive learning over a period of a few days. Some companies were providing training in the evenings to reduce costs. Training was being more closely targeted with shorter programmes around tightly defined objectives. There was concern on the part of trainers that such provision would be more targeted at company aims and less at the needs of workers.

## **4. Conclusion**

We hope that with the theoretical framework and with the overview we have developed the first step towards a "pattern language"<sup>1</sup> that helps to make informed decisions about the design of a professional development framework for trainers based on the actual practices of training and the needs of the community of practice of trainers.

In applying a clear focus on actual practice, we assume that we are closer to the needs of practitioners in training than in previous comparative studies of trainers. The majority of these

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<sup>1</sup> The initial considerations on this methodology chapter were very much inspired by the notion of a "pattern language" for training as was developed by Christopher Alexander and his colleagues in architecture and urban design. In brief, a pattern language is a network of patterns of varying scales; each pattern is embodied as a concrete prototype, and is related to larger scale patterns which it supports, and to smaller scale patterns which support it. The goal of a pattern language is to capture patterns in their contexts, and to provide a mechanism for understanding the non-local consequences of design decisions.

have focused on systems and overarching structures for training-the-trainers. In our ongoing research, we have found that the problems in the contexts of our case studies are much more alike across countries than could be expected by applying a comparative design based on such formal policies and systems and structures of training.

Instead – the other way around – we want to reveal those factors which explain the relationship between practice and the different contexts in which practice takes place. In order to further understand the context of the case studies we have carried out interviews and focus group meetings to learn about developments at a system and policy level. The results of this work are reported in the following chapter..

Of course national training systems are an important factor in shaping training practices, but only one amongst others. Others may include changing technologies, work organisation, requirements for skills and knowledge in the workplace, quality requirements and occupational profiles.

The TT-Plus project is focused not on research as an aim in itself but rather on developing a Framework for Continuing Professional Development. We did not have a fixed pre-conception of the form in which the Framework should take. However we were convinced that any such Framework should be both inclusive of the different forms and practices of training in different European countries and dynamic to support changes in that practice . To that end we have been concerned to develop a methodology that can capture and represent practice in forms in which we can both develop a generic framework that transcends national boundaries and focus professional development of areas of actual practice, rather than abstracted task analysis.

## CHAPTER 3 - EXISTING POLICIES FOR THE TRAINING OF TRAINERS

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### 1. Policy mapping – what are we seeking to discover?

The aim of the policy analyses undertaken by the TTPlus project was to provide background material to help further the development of initiatives to promote the professional development of trainers. The project used a simple mapping instrument to gather information on responsibilities for education and training policies, the role of public bodies and other stakeholders and on emerging issues or change agendas that are being debated. However, this information as such was of limited use for exploring the possibilities for launching new initiatives or for promoting effective measures. Therefore, there was a need to change the perspective from simply mapping policies to grounded policy analyses centred on the problems and concerns of trainers.

This transition required an awareness of the limits of current policies in shaping the boundary conditions for training and the work of trainers and the development of policy scenarios capable of taking into account a number of tensions which had been identified in the project's empirical research. These included:

#### a) *System-oriented versus market-oriented development of training provision*

Training can be seen as part of the public education and training system or as being provided by a private sector dominated market. Accordingly, the trainers are treated as systemic actors or as service providers to the market. Depending on the system-orientation or market-orientation of the policy climate, public policies may play an active or marginal role in training-the-trainers and in promoting their continuing professional development.

#### b) *Professionalisation versus incremental competence accumulation*

The second tension refers to different social dynamics regarding the professional development of trainers. The perspective of professionalisation links trainers to similar career models such as teachers and HRD professionals and requires similar opportunities for career development and recognition. The perspective of incremental competence accumulation emphasises the heterogeneous learning needs of trainers and context-specific interests in using the outcomes of professional development.

#### c) *Regulative measures versus incremental intervention*

There are different options for government intervention in the development of training (and the professional development of trainers). In addition (and as an alternative) to regulative

measures, recent policies are to some extent characterised by interventions which may support market oriented developments in the training culture.

d) ***Targeted measures versus spill-over effects***

The fourth tension refers to the somewhat ambiguous position of training provision (and the professional development of trainers) as a target area for policy or as grey zone between different policies. Therefore, it is not clear to what extent training (and the position of trainers) is mainly influenced by targeted policies or by spill-over effects from other policies, either through deliberate measures or via unintended consequences.

The tensions should not be taken as mutually contradictory, but rather as a continuum of options that can be linked to each other. Therefore, a picture of current policies can at best be presented as a complex policy landscape in which the key measures may have a limited impact on the work of trainers whilst an effective support environment for promoting professional development of trainers may require new policy initiatives.

## **2. The role of critical issues and generative themes for grounded policy analyses**

For grounded policy analyses, the identification of the main characteristics of the policy landscape is only the first step that narrows down the range of possible policy choices to the range of most likely developments. However, scenarios that are drawn only with the help of such macro-characteristics would give a one-sided picture of policy processes. In addition to such general characteristics, it is necessary to pay attention to critical issues and/or generative themes that are more closely related to the development of particular training contexts and the interests of trainers.

In the light of the policy mapping and the empirical studies of the TTplus project, it is possible to identify some critical issues and/or generative themes that are essential for linking the trainers' concerns or interests to policy agendas:

1) ***The role of mandatory qualifications and certification for trainers confirming trainers***

In some countries trainers or supervisors of trainers are required to have acquired qualifications. What kind of merit value do these certificates have? What kind of basis do they provide for further professional development as training-related specialists? What kind of basis do the related courses provide for the curricular and pedagogic expertise of trainers?

2) ***The role of quality control systems and quality monitoring***

In some countries government bodies or umbrella organisations of training providers have developed quality control systems including registers of approved training. What kinds of training activities are covered by such registers and what are not included? If there are parallel registers, are the quality criteria compatible with each other? What is the importance of such registers for the professional development of trainers?

### 3) ***The role of specific measures for upgrading trainers' competences***

Some countries are developing specific curricula or accreditation programmes for upgrading trainers' competences. To what extent are these measures at an early stage of piloting and to what extent are they becoming established? In what way are the related curricula creating a balance between subject areas and work process-oriented knowledge? In what ways can the accreditation models create an awareness of learning in terms of subject areas and work process knowledge? How can these measures be related to frameworks for formal recognition?

The list of critical issues or generative themes is not exhaustive. Equally, it is worth noting that in different participating countries (and in the training contexts that have been examined) the issues and related initiatives have different relevance.

We have attempted to develop pictures of country-specific policy landscapes and to explore evidence they provide of the impact of general policies for the position of trainers and the specific implications for the professional development of trainers as well as the prospects of initiatives targeted at trainers of gaining wider policy support.

## **3. The context for the development of training policies**

The project has developed detailed analyses of the contexts for the introduction of training policies in different European countries. The full version of these analyses can be found on the TTPlus project web site ([www.ttplus.org](http://www.ttplus.org)). In this chapter we will provide a summary of this work.

### *3.1 The context for the development of training policies in Germany*

It is possible to characterise the German training policy context as a constellation of mutually complementing training policies.

The policy analyses and the expert interviews as well as the case studies undertaken by the project indicate that the dual system of VET is the main systemic framework for training activities in Germany.

Despite different regulatory frameworks for Vocational Education and Training, Continuing Vocational Training the main qualification for all trainers is the AEVO (Trainers Aptitude Certificate).

Whilst there are criticisms of the current AEVO model and attempts to introduce new training models for advanced training professionals, there is still a concern to involve the main stakeholders of the dual system in developmental initiatives. Experts interviewed by the TTplus project also favoured the participation of universities and enterprise training departments.

Altogether, it appears that the key actors in the field see the future of training policies in terms of renewal and improvement of the dual training system. Therefore, (at least in the short term)

the review of the current AEVO certificate is seen as the first step in the renewal of measures for the training-of-trainers. The more far-reaching initiatives tend to gain support in as much as they provide new learning opportunities and stronger recognition for trainers and training specialists who otherwise would fall between the systems.

### *3.2 The context for the development of training policies in Greece*

Greek training policies are characterised by parallel government policies to promote the quality of training with the help of central monitoring arrangements. For public and private training centres, there are umbrella organisations that have launched quality processes and registers or measures for self-certification. However, the distribution of authorities and the patterns of monitoring reproduce a patchwork like system and a dispersed mode of policy development. Therefore, enterprises that develop their own training activities seem reluctant to develop closer cooperation with government bodies. Moreover, the commitment of the enterprises to organise training (and to promote the professional development of trainers) varies strongly from case to case.

Greek focus group meetings considered the TTplus framework and the proposed awarding body as a possible new starting point for policies that bring together different public bodies and stakeholders. In this respect, the policy for promoting the Information Society serves as a model. In addition, the Greek focus groups drew attention to the need to analyse more closely how different sectors influence the organisational commitment to training and to the utilisation of learning outcomes.

### *3.3 The context for the development of training policies in Portugal*

VET courses can be developed by education and training providers in Portugal and are integrated in the SNQ (System of National Qualifications). All organisations that are entitled to deliver VET training have to be accredited by a national agency (the IQF – Institute for Training Quality).

There is also a network of training centres directly linked to the IEFP (Institute of Employment and Vocational Training), a national agency that coordinates and supervises all the VET programmes offered as employment promotion measures. The IEFP is responsible for the certification of the trainers' pedagogical ability (CAP). In order to offer a 'Pedagogical Vocational Training Course', the training provider must be accredited by the IQF and examined by the IEFP. The approval by the IEFP is given if the training provision meets the necessary quality criteria and the current requirements of the labour market in the particular sector. Training providers cannot offer publicly supported and recognised training without CAP certified trainers. However, internal training schemes by private companies are exempted from the formal requirement of the CAP certificates for their trainers.

The Portuguese focus group meetings viewed the role of the CAP certificate as a critical issue. At present, the CAP certificate is appreciated as a basic measure to ensure certain pedagogic quality in publicly supported training. However, the current methods of delivery of training for CAP courses tend to restrict the dissemination of new pedagogic and curricular models. Therefore, the use of the TTplus framework was discussed from the perspective of introducing new pilot activities that would make the CAP more open for pedagogic innovations and for professional development of trainers.

### 3.4 *The context for the development of training policies in Romania*

Romanian training policy is characterised by the distribution of powers and by the emergence of new agencies after the transition period. In this context the development of a National Qualification Framework (based on the European Qualification Framework for Lifelong Learning) plays a major role. Furthermore, the introduction of major pilot projects funded by European Social Funds provides a basis for promoting new training initiatives.

In the Romanian focus group meetings, central attention was given to the potential of the TTplus framework to support these developments. In this respect, the two groups set different priorities regarding the role of the Framework as a support tool for pedagogic development initiatives and/or as support tool for quality assurance and related monitoring.

### 3.5 *The context for the development of training policies in the United Kingdom*

The UK studies and focus groups were undertaken in Wales. Education policies are now being devolved from the London based government to Scotland and Wales and at the time the project was carried out it was difficult to assess the direction and impact of these measures. Central government policies of training have been based on the promotion of the National Vocational Training System (NVQs).

Consequently, the focus group meetings in Wales considered how to develop their own professional development and how to gain appropriate support. This led to a further reflection on the possible role of professional associations, industrial bodies and government bodies as promoters of new initiatives.

### 3.6 *The context for the development of training policies in the Netherlands*

Information provided by the mapping instrument in the Netherlands suggests the distribution of powers between public bodies and the division of labour between operative agencies.

The expert interviews that were organised in the Netherlands drew attention to the possibilities for organisations involved in the Dutch case studies to make use of the TTplus framework. In this context the organisations considered themselves as free players in the training market. Thus, the expectations on the usability and future development of the framework were related to benchmarking and quality assurance at an organisational level.

## **4. The contribution of policies to the Professional Development of Trainers**

Although the TTplus project had neither the time nor resources for detailed policy analyses in all participating countries, it is possible to draw some preliminary conclusions on the role of current policies as support for (or an obstacle to) the professional development of trainers. The following questions are of central concern in this respect:

- In what way are current policies addressing the issue of the professional development of trainers?

- To what extent do the organisations interviewed perceive that their needs and interests regarding the quality of training or the development of trainers are considered?
- To what extent do the organisations bring forward needs for intervention (or points of interest concerning their own participation) in further policy development?

It is possible to identify the relative distance between public policies and the training contexts identified in the empirical research undertaken by the project:

In Greece public policies were perceived as fragmented interventions that did not address explicitly the training activities that were developed by individual companies (based on their own initiatives). Emerging initiatives to support the professional development of trainers would have to overcome the current particularisation.

In Portugal public policies have an impact through mandatory training certification and through public monitoring activities (IEFP). Emerging initiatives to promote pedagogic and social innovation in training would require changes in the mandatory certificate and in the pattern of monitoring.

In Romania the role of public policies is being reshaped alongside the introduction of European Qualification frameworks and the European Social Funds. There are some expectations of the integration of training-the-trainers within national qualification frameworks and interest in launching pilot projects on training (including professional support for trainers).

In the Netherlands the potential for the TTplus framework was discussed from the perspective of the specific companies (and their interest in developing benchmarks for training).

In the United Kingdom (and in particular in Wales) the relation between public policies and the training contexts was considered more distant due to devolution, lack of policies regarding training (within companies) and due to the mode of intervention (focus on assessment). Thus, the emerging initiatives were discussed as matters for professional communities and networks.

## **5. Change agendas and policy development**

The main point of the grounded policy analyses has been the shift of emphasis from policies as such (that may or may not have an impact on training) to training-related policy contexts. By changing the perspective of the TTplus project has been possible to analyse the role of policies as a support environment for training related measures and initiatives. The starting point is clarification of the relative distance between training-oriented policies vis-à-vis the field and of the responsiveness of key actors in training vis-à-vis policies. This provides the basis for specifying the role of emerging change agendas and key issues for actors in the field. This makes it possible to anticipate the need for policy interventions and the readiness for participation.

Table 1 (below) brings together the preliminary results as a contextual map for analysing current policies on training and for promoting the professional development of trainers.

Table 1: Contextual map of policy environments for professional development of trainers

Country	Policy context(s)/ Responsiveness	Change agendas/ Key issues	Need for interventions / Case for participation
<b>Germany</b>	National alliance for training opportunities; Temporary suspension of the mandatory trainers' certificate (AEVO)  <b>vs.</b> continuity of AEVO-based <i>training of trainers</i> and related training cultures in companies that provide dual training.	Re-introduction & partial renewal of the AEVO.  <b>vs.</b> local piloting with complementary training models: - horizontal integration (diverse training functions), - vertical integration (progression to higher position)	Re-establishment of the AEVO agreed by key stakeholders; Designed umbrella project on higher trainers' qualifications  <b>vs.</b> lack of concept for recognition of prior learning within trainers' career models.
<b>Greece</b>	Fragmentation of public training policies & monitoring of trainers' quality (registers)  <b>vs.</b> adaptation of training centres and 'opting out' strategies of private companies.	Concerns of public bodies on the EU-compatibility of parallel registers  <b>vs.</b> concerns of associations of HRD professionals' and trainers.	Overarching body & stakeholder support needed to overcome fragmentation  <b>vs.</b> sector and organisational expertise needed to involve the private companies.
<b>Portugal</b>	Trainer's certificate (CAP) and monitoring by the employment authority (IEFP) as key instruments of public policies  <b>vs.</b> use of CAP precondition for public support and EU-funding	CAP and the monitoring pattern are stabilised; no policy debates and major change agendas  <b>vs.</b> interest to pilot with new pedagogic approaches.	Revision of CAP and the patterns of delivery and monitoring needed for curricular initiatives  <b>vs.</b> interest to launch new regional pilot projects
<b>Romania</b>	Public policies models shaped with external policy advice during the transition period  <b>vs.</b> organisational and sectoral training cultures have been shaped with diverse ideas.	Current policies are being mainstreamed on the basis of the EQFs and NQFs  <b>vs.</b> regional and educational actors willing to launch ESF-funded pilot projects.	Policy makers' interest in following the EU models and related policy advice  <b>vs.</b> training-related actors' interest to gain free space for innovations and piloting.
<b>Wales</b>	Devolution of government powers, policies mainly targeted to school-based settings and to assessment of outcomes  <b>vs.</b> companies' interest in outsourcing training functions and in assessing the service providers.	Current policies focus on assessment processes and on accreditation of the awarding bodies  <b>vs.</b> trainers' interest in shaping support services for their own professional networks.	Difficulties in addressing trainers' professional development via public education and training policies  <b>vs.</b> trainers' interest in finding context-specific platforms for innovations and piloting.
<b>Netherlands</b>	Particularisation of public powers, policies mainly targeted to monitoring/benchmarking of educational institutions  <b>vs.</b> companies' interest in outsourcing training functions and in assessing the service providers.	Current policies focus on accreditation of educational institutes and accountability of training services  <b>vs.</b> companies' and training providers' interest in benchmarks that are usable in the training markets	Ongoing pilot schemes for continuing professional development of teachers without teacher education  <b>vs.</b> difficulties in addressing <i>trainers</i> professional development via public education and training policies.

The contextual map draws attention to the interplay between policy contexts, emerging key issues on trainers' professional development and possible interventions or initiatives. In this respect, the instrument helps put questions of trainers' professional development into the centre and to consider the policy contexts, change agendas and interventions as possible support environments. Equally, the instrument helps to create a comparison between different country samples and related policy environments – not between system architectures and policy frameworks as such.

In addition, it is worthwhile noting that the instrument does not present the policy contexts as linear chains between policy preparation, decision making and policy implementation. Instead, the instrument makes it possible to portray the relations between policy contexts or policy processes and activities and initiatives. On the basis of empirical material it is possible to highlight mutual adjustment, conceptual tensions and eventual conflicts of interest.

## **6. Cross-cultural issues, tensions and contradictions**

The grounded policy analyses undertaken by the TTplus project have identified a number of cross-cultural issues, tensions and conflicts of interest.

### **1. Training as a domain of its own or as an interface area**

In many cases current policies tend to treat training competences as a separate domain of expertise. However, the empirical studies demonstrate that training expertise is often linked to interfaces between domain-specific knowledge, work process knowledge and pedagogic know-how in developing context specific learning processes.

### **2. Training for professional trainers or for all those involved in training**

In many cases current policies tend to treat 'training competences' as the exclusive competences of established and recognised 'trainers'. However, the empirical studies of the TTplus projects demonstrate that training activities are often based on cooperation between trainers and skilled workers and managers and that many different people may have some role in the training process.

### **3. Trainers' certificates as minimum requirements or as milestones in continuing professional development**

In many cases current policies require some formal qualifications or certificates as entry qualifications working as a trainer. However, the empirical studies undertaken the TTplus project bring suggest a number of contradictions in such certification. Equally, the studies suggest different people may be involved in training and learning activities.

### **4. Quality development via external control or via internal learning activities**

In some countries policy measures have been introduced to develop databases and registers for monitoring the training competences of organisations and their staff members. The empirical studies have suggested other ways of promoting the quality of training and work-related learning with the help of peer learning and related knowledge sharing.

### **5. Ownership of training expertise by external authorities or by the actors and organisations involved**

In many cases policies tend to highlight the role of external authorities as owners of training expertise and as competent bodies to recognise trainers' qualifications and competences. The empirical studies bring forward the need to take into account the context-specific requirements for learning, facilitation and related feedback.

### **6. Implications for the common framework**

Two critical questions were raised by the policy analyses for the further development of a common Framework for Professional Development.

The first is whether 'teachers and trainers' can be considered as a homogeneous target group for European policies or whether there is a need to develop a specific approach for 'trainers'? The second is whether common European frameworks can be used effectively to promote the training-of-trainers or the continuing professional development of trainers in different training cultures?

The results of the policy analyses suggest European policies for teachers and trainers would not successfully cater for the specific needs of trainers. The results of the grounded policy analyses provide a picture of a dispersed landscape of policy contexts with different critical issues and with different preconditions for successful interventions and initiatives. Thus, the picture is clearly different from the policy landscape for improving the quality of teacher education or for promoting the professionalisation of teachers.

Likewise, the policy analyses suggest that present European policy frameworks are unlikely to effectively support the training of trainers or continuing professional development of trainers. This issue will be further explored in Chapter Six of this book.

The TTplus project has drafted a proposal for a common developmental framework, outlined in the following chapter, with a view to different training cultures and policy environments opportunities. Instead of setting fixed target groups, competence profiles or minimum qualifications the project has outlined an open space for learning and professional development. In this context the framework invites trainers, companies, trade unions, intermediate bodies and public authorities to specify their commitments to the development of training. This proposal tries to open a new avenue for European cooperation.

## CHAPTER 4 - SUPPORTING AND IMPROVING THE CONTINUING PROFESSIONAL DEVELOPMENT OF TRAINERS: A FRAMEWORK FOR RECOGNISING LEARNING

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### 1 Improving professional development

The European Commission sponsored TTplus project aims to support and improve the continuing professional development of trainers. The project has been examining the context in which training takes place in enterprises and the effectiveness of present policies and provision for the training of trainers.

The project is developing a framework for the continuing professional development of trainers and examining different measures and mechanism for implementing the professional development framework. This Chapter introduces our key findings and proposed framework and mechanisms for its implementation.

We are aware of the difficulties in creating shared understandings and meanings around key concepts and vocabulary. Wherever possible, we have tried to explain the intended meanings of key terminology.

The research undertaken by the project showed that the number of trainers in Europe has increased. These 'trainers' include full time trainers, people with a formal training responsibility and all those for whom supporting the learning of others is part of their job. It also concluded that many of these people do not have effective or adequate access to continuing professional development opportunities or support or recognition for their own learning.

It is clear that if the standards of training are to be raised, improving the training of trainers must be a priority. However, given the heterogeneous nature of the group and the range of sectors and occupations in which they work, it is difficult to see how this could be standardised, or indeed whether it is desirable to do so. Certainly some sort of common framework would have advantages. It would provide a degree of coherence to what is a very fragmented field. It would increase the visibility of trainer training and in so doing, increase awareness. It could also stimulate the establishment of communities of practice between trainers.

Previous attempts at solving this problem can be roughly divided into two.

a) *Competence framework approaches*

An output based solution that depends on disaggregating the skills and competences that have been identified as necessary for skilled performance. It is often used as a way of providing recognition for the skills already possessed by the trainer, typically through the compilation of a portfolio of evidence. It will also

highlight missing competences so that the trainer can see which areas they need to develop. The disadvantages are:

- It is essentially a backward-mapping exercise – recognizing and rewarding competences rather than providing opportunities for new learning.
- There are invariably problems with granularity and with designing a credible classification system.
- It identifies gaps in skills and knowledge but does not fill them.

b) *Qualifications approach*

An input based approach that depends on increasing the professionalisation of trainers by providing accredited training-the-trainer opportunities, which lead to formal qualifications, hierarchically arranged. The assumption is that the provision of higher levels of trainer training and thus higher-level qualifications for trainers will push up standards of the training they deliver. The major problems with this approach are:

- This can only operate on an individual level and is not transferable to organizations
- There is an issue around occupational identities. Many 'trainers' do not see themselves as trainers per se, their occupational identity being based on being a skilled worker or manager but who still have some responsibility for facilitating the learning of colleagues.
- It implies that progression for trainers is 'vertical' whereas in practice many of the trainers' learning needs will be lateral. That is, they may want more knowledge or skills at the *same* and not a higher level.
- The assumption that if qualifications are higher and harder then standards somehow go up, is unproven. In countries with a formal training-the-trainer framework (e.g. UK) there is little research evidence to suggest this.

This is not to suggest these approaches are not useful. But, on their own, the project research suggests they are inadequate for the task of raising the standard of training through professional development for trainers.

## 2 The challenges in designing an accreditation framework

The Framework detailed in this Chapter is an accreditation framework. Educational accreditation is a type of quality assurance process under which an organisations' services and operations are examined by a third-party accrediting agency to determine if applicable standards are met. Should the facility meet the accrediting agency's standards, the facility receives accredited status from the accrediting agency. Such accreditation often takes the

form of a 'kitemark' or quality mark designed to show that the organization has met the standards.

The challenges in designing an accreditation system for trainers are three-fold:

Firstly, how can a framework reflect the TTPlus project research findings and be:

- Inclusive enough to accommodate the diversity of people labelled as 'trainers' and the diversity of contexts in which they work;
- An instrument for improving the quality of practice;
- A process to improve and increase access to training opportunities for trainers?

Secondly, how can a framework incorporate the best features of previous approaches whilst minimising their disadvantages. Specifically how can a framework:

- Identify 'gaps' in organizational or individual trainer 'performance' AND simultaneously facilitate the learning necessary to close the gaps;
- Provide recognition and reward for both individuals and organisations;
- Be relevant and sensitive to a range of occupational identities?

Thirdly, how can a single framework be flexible enough to allow sectoral, local, regional and national variation whilst still maintaining transnational coherence and a shared European approach?

In short, how can standards be improved without standardization?

### **3 A possible framework**

This Chapter outlines a possible solution based on a set of common or shared elements and another set of elements where there are choices or divergences to be made at country, organizational or individual level.

There are probably six 'components' of the framework that can be identified together with linking mechanisms:

- A set of principles
- A set of standards
- An infrastructure
- Processes and mechanisms for applying them and documentation.
- Tools and materials to help those engaged in the process
- Exemplars of evidence

### 3.1 *A set of principles.*

The framework should set out the principles and a priori assumptions on which it rests and which defines its purpose and will determine its direction.

Part of the work of the TTPlus project has been to identify these principles, which have been framed in terms of the 'Principles' on which the framework rests. These include

#### **Recognition of the importance of**

- *trainers in facilitating learning and the role of learning for individual competence development and organisational development*
- *different modes of learning and different modes of assessing learning*
- *different roles people play in training and learning*
- *opportunities for initial and continuing professional development*
- *opportunities of opportunities to practice*
- *networking*
- *partnerships*
- *the development of tools and platforms*
- *ongoing research and monitoring*

### 3.2 *A set of standards<sup>2</sup>*

The core standards against which individuals and organisations may be judged, will be common across countries. Achievement of these standards will be the basis on which the 'kitemark' is awarded. Kitemark is a term for a process of approval of a product or service – in this case the professional development of trainers.

Some organizations and individuals may want to have their training *accredited* using the core standards as an external benchmark.

Other organizations or individuals may find that some of the standards are not relevant to their work or they may want to amend some or include some of their own to reflect their own context. In this case, a separate but similar process can apply whereby their training can be *endorsed* or judged as fit-for-purpose against their own standards.

The TTPlus project is proposing that these standards are expressed as a set of 'Commitments'. For example individual trainer commitments may be as follows:

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<sup>2</sup> The standards are a set of statements against which achievement can be judged. This does not imply standardisation. Whilst the project is putting forward a set of generic standards, organisations may wish to amend these, or to develop their own standards for endorsement as explained in the consultation paper. The Framework has been designed to allow flexibility in the processes of adoption, development and implementation in different contexts.

### **Commitments by individual trainers**

- 1. To recognise the importance of their own continuing learning and professional development*
- 2. To produce their own goals for professional development and to review those goals on a regular basis*
- 3. To contribute to the continuing professional development of colleagues*
- 4. To undertake activities to support reflection on personal practice, through for example, the development of e-portfolios or interaction with other trainers*
- 5. To evaluate and review training practice in order to improve that practice*
- 6. To identify opportunities for personal learning and development*
- 7. To review – formally or informally – their own competences and consider what further competences they wish or need to develop*
- 8. To support and promote the framework for professional development of trainers”*

### **Commitments by teams**

Through our research it became obvious that teams are playing an important role in the professional development of trainers as well as in initiating organizational change. The following are proposed commitments for teams of trainers to the Framework.

- 1. To recognise the importance of the continuing learning and professional development of each individual member*
- 2. To recognise the importance of its own continuing learning and professional development as a team*
- 3. To produce their own goals for professional development as a team and to review those goals on a regular basis.*
- 4. To contribute to the professional development of each team member.*
- 5. To undertake activities to support reflection on team practice*
- 6. To evaluate and review training practice within the team*
- 7. To review the competences of the team and consider what further competences they wish to develop*
- 8. To support the dialogue between the trainers and the organisation*
- 9. To support and promote the framework for professional development of trainers*

For employers and trade unions these would look slightly different:

## **Commitments by employers and trade unions**

Why employers and trade unions? Although, in some countries trade unions have little to do with training, in others they are extremely influential. The following are proposed commitments for employers and trade unions to the Framework.

- 1. To recognise the importance of training and learning and the role of trainers in facilitating training and learning.*
- 2. To provide opportunities for the professional development of trainers.*
- 3. To provide opportunities for trainers to practice in order to develop their professional competence.*
- 4. To support reflection on practice, through for example, the development of e-portfolios.*
- 5. To support and promote dialogue with trainers and other interested parties on the improvement of training practice.*
- 6. To examine training activities and adopt actions for the professional development of trainers.*
- 7. To consider the different competences required of trainers and examine opportunities for professional development of these competences*
- 8. To review progress in implementing the framework on a regular basis*
- 9. To support and promote the framework for professional development of trainers”*

## **Commitments by intermediary bodies**

Interestingly, the TTPlus project has also identified 'Commitments' for intermediate bodies and for governmental bodies. This is important as, possibly for the first time, it is proposing that all those involved in training should adopt a common set of standards. It reinforces and binds together the partnership approach and demonstrates that all are equal within the partnership with different but equal responsibilities. It also moves intermediary and governmental bodies nearer to practice by moving practice into their organisations. These include a wide variety of different intermediary bodies including regional economic development organisations, sector organisations, Chambers of Trade, examination boards etc.

- 1. To recognise the importance of training and learning and the role of trainers in facilitating training and learning.*
- 2. To support social partners in providing opportunities for the professional development of trainers.*
- 3. To support social partners in providing opportunities for trainers to practice in order to develop their professional competence.*
- 4. To support social partners in facilitating reflection on practice, through for example, the development of e-portfolios.*
- 5. To support social partners in promoting dialogue with trainers and other interested parties on the improvement of training practice.*
- 6. To support the development of actions for the professional development of trainers.*
- 7. To consider the different competences required of trainers and examine opportunities for professional development of these competences*
- 8. To review progress in implementing the framework on a regular basis on a sector or regional basis.*
- 9. To support and promote the framework for professional development of trainers*

## **Commitments by governmental bodies**

The TTplus project has also recognized that governmental bodies have an important role in promoting and supporting professional development for trainers. These commitments are designed for governmental bodies at different levels. This may include national, regional and local bodies, or even the European Commission.

- 1. Support and promote the Framework to employers, trade unions, intermediary bodies and all those with an interest in learning and training.*
- 2. Promote an understanding of the importance of training for competence development and lifelong learning*
- 3. Support the development of tools and learning materials for trainers*
- 4. Promote opportunities for professional development for trainers.*
- 5. Promote flexible access to qualifications for trainers and promote the recognition of those qualifications*
- 6. Support activities by intermediary bodies to support the professional development of trainers*
- 7. Commission and support research in learning and training and the professional development of trainers*
- 8. Examine employment structures and how these structures effect learning and training.*
- 9. Support the dissemination of examples of good and effective practice in learning and training and the professional development of trainers.*

## 4 The infrastructure

### 4.1 Awarding bodies

In order to implement the Framework an awarding or regulatory body would need to be established in each participating country, sector or region. There may or may not be a need to set up a transnational body with representation from the national bodies.

The constitution of the awarding bodies may vary from country to country. There may be a permanent secretariat or it may be done on a voluntary basis. It may be tied in with an existing umbrella organization or it may be a stand-alone body. It might be externally funded or income generating and self-sufficient. Also, the internal structures will vary.

The only thing that unites the 'Awarding Bodies' would be a common set of functions.

#### The Awarding body will:

1. Have an **executive group** that will oversee the operation of the framework in that country and agree national variations. It may be composed of representatives of relevant organisations or sectors or it may be composed of elected 'experts'.
2. Have a **technical / training** group that will be responsible for the design and development of content. This group may be co-terminus with the executive group, a sub-set of the executive group or independently constituted. Again it may be composed of representatives or individuals, with positional or with personal expertise
3. Be responsible for **liaison** with policy makers, other interested organizations and facilitators.
4. Be responsible for establishing and registering a **kitemark or award** and defining its purpose, scope and status in that country. There should be at least two awards – one for individuals, one for organizations. Maybe there will be a need for more to reflect different types of organization, for example companies and trade unions. There will also need to be decisions about the 'shelf-life' or time duration of the award – is it a once-and-for all or something which has to be repeated or updated
5. Be responsible for **marketing and dissemination**
6. Be responsible for the **delivery and implementation** of the framework in that country
7. **Identify and train peer facilitators or mentors** who will be key agents in delivering the framework in the field.

## 4.2 Processes and mechanisms for applying the standards and documentation

Whilst the actual mechanisms may vary in different countries, regions, sectors or organisations, a typical process may look like this:

### Stage 1

- i) An initial enquiry by the organization or individual to the Awarding Body (AB)
- ii) A brochure or small pack of material explaining the kitemark / award sent out by AB. This describes what it is, what sort of criteria, what sort of process, what sort of focus etc.
- iii) Formal expression of interest by organization or individual
- iv) Arrangement made for representative of AB to meet personally (or on-line) with individual or organization. The purpose of the meeting is to explain process in detail, the nature of the commitment, timescales, calendar of events, resources, help applicant determine and whether to elect for the *accreditation* or *endorsement* procedure.
- v) The applicant is provided with a list of the information they will need to supply to the AB before the next stage and the preparation they will need to make for a visit by a panel of peer mentors. This documentation should be 'light' as so often similar processes become document driven and end up as a series of hoops to be jumped through.

Crucially, the applicant is provided with a *set of tools* to help them through the process including one for carrying out a training 'health-check'. This is the process of *internal validation*.

They will also be asked to assemble *evidence* to demonstrate and substantiate their Commitments. Evidence can include but should be more than documentation and a list of *exemplars* have already been produced by the TT+ project mapped onto the Commitments. Additionally, a set of materials will be provided to applicants which represent exemplars of rich 'evidence' from *case studies* elsewhere.

A peer mentor will be assigned to the applicant to support them through this process.

There may be a case for an interim or first stage or lower level award at this point as some applicants may feel that they have already put a lot of work into the process, gained skills and knowledge and improved their practice.

This award could be on the basis of a recommendation by the peer facilitator or mentor in conjunction with the applicant.

## Stage II

When the applicant feels ready the second stage of the process will be the organization of a panel of peer-mentors who will meet with the applicant on one or more occasions. The number of people and the length of the meeting will depend on whether the applicant is an individual or on the size and complexity of the organization.

The team of peer-mentors will be determined by the AB and agreed with the applicant. Typically, it will include a person working in a similar context, one who can bring an 'outside' perspective and maybe another who is working in a field in which the applicant is interested in developing.

Typically the meeting (s) should include (for an organization)

- An opportunity to meet *collectively* with representatives from management, training specialists (e.g. HRD representatives), trainers and learners to address the commitments, the evidence and issues arising and to gather any additional information. This meeting should be designed to help and support the organizational learning process.
- Observation of practice
- A meeting of the peer mentor team to generate some conclusions
- A meeting of the applicant team to generate some conclusions
- A final review meeting designed to reconcile the conclusions (if necessary) and to negotiate on whether the award should be made or whether additional evidence or actions are appropriate and useful. If this is the case, an action plan should be drawn up and agreed.

### Some tools and materials to help those engaged in the process

These are too numerous to detail but should include, at the very least, a How-to-do-it type handbook which will guide applicants through the process as well as being a valuable learning resource in its own right. This could be extended to include videos of parts of the process or 'simulated' interviews. The tools should also include materials to help them undertake the internal validation process described above. These could include checklists, data gathering tools, data analysis tools etc

### Some exemplars of evidence

This was referred to in 4.1 above. This will have two functions. Firstly to stimulate ideas on how their training-the-trainer practices could be improved and secondly to encourage them think of innovative forms of generating 'rich evidence.' The following exemplars should be extended:

### **Exemplar actions by trainers**

1. To develop an e-portfolio or web log
2. To undertake training with a colleague and to peer review that work
3. To attend a conference or training event
4. To develop and implement new tools or learning materials
5. To pilot new pedagogic approaches or methods within training activities
6. To actively participate in a face to face or on-line network or community or professional association of trainers
7. To undertake research in their area
8. To read a book or articles related to their professional field
9. To participate in a project or pilot development activity

### **Exemplar actions by employers and trade unions**

1. Support and facilitate peer and team working and review between trainers – inside or outside the organisation.
2. Support the establishment of a forum – face to face, on-line or both – for all those involved in training.
3. Establish a review body including managers, trainers and learners to undertake a formative review of training activities.
4. Support the involvement of trainers in conferences, seminars and other external professional development events
5. Encourage the development of training diaries or e-Portfolios
6. Promote the use of different tools for analysing workplace learning potential.
7. Encourage the participation of trainers in communities of practice or in professional organisations for trainers.
8. Allow trainers a budget for professional development activities.
9. Support trainers in following courses to gain further qualifications.

### **Exemplar actions by intermediary bodies to implement the framework**

1. Support the establishment of networks between trainers in different companies.
2. Support the recognition of prior learning and activity as the basis for qualifications
3. Promote regular professional development events for trainers
4. Commission and support the implementation of tools to help with workplace training
5. Establish web sites and other collective and shared resources for trainers
6. Offer e-Portfolio applications for trainers
7. Collect and promote exemplars of good practice in training and the professional development of trainers.
8. Provide advice and guidance to members and local organisations in implementing the Framework

### **Exemplar actions by governmental bodies**

1. Incorporate the Framework in policy initiatives and developments whilst recognising the voluntary nature of the Framework
2. Commission projects which can support the development of the framework
3. Support the recognition of prior learning and activity as the basis for qualifications
4. Promote the Framework at government sponsored conferences and events
5. Promote the Framework to agencies and other intermediary bodies
6. Promote the Framework through web sites and publications
7. Promote policies to support the development and establishment of e-Portfolios
8. Implement the Framework for trainers employed by governmental bodies as exemplars of good practice
9. Provide advice and guidance to members and local organisations in implementing the Framework

## 5. The accreditation / endorsement process as a learning process

For the framework to be useful, attractive and consistent with its own principles, it should also be a learning process for trainers. The following grid attempts to map the learning process against the process outlined above.

Process	Learning
Expression of interest	Raises awareness of issues around improving trainer performance and standards. Increases realisation that the potential to do this exists.
First visit by AB representative	Challenges their commitment to training the trainers – how do you value training the trainer in your organization? Are you serious?
Validation process – Health Check	Internal audit and review – where are the gaps? Learning about capacity, capability and potential.
Documentary evidence	Recognising and articulating what they are doing. Consultation with - and inclusion of- stakeholders. Making assumptions concrete and transparent.
Examples of evidence	New ideas for 'filling the gaps' Enhancing provision
Preparation for formal visit	Establishing shared understandings between stakeholders Team building Conflict resolution
Formal meeting	Critical reflection Reviewing evidence Giving and receiving feedback
Decision on awarding	Negotiating outcomes Action planning

## **6. Where next for the development of the framework?**

This Framework was the subject of a wide consultation process. The aim was to ascertain whether the outline we have produced was felt to be a valid and useful approach to the professional development of trainers.

We also wished to identify organisations interested in working with us in the further development of the framework and organisations that would be prepared to pilot the framework.

The results of the consultation are described in the following Chapter.

## CHAPTER 5 - A COMMON FRAMEWORK FOR PROFESSIONAL DEVELOPMENT OF TRAINERS IN EUROPE: A PERSPECTIVE FROM FINDINGS OF THE FOCUS GROUPS

**Eduardo Figueira, Academus**

### **1. Focus Groups**

In order to see how training practitioners would react to the idea and development of a common Framework for the Professional Development of Trainers in Europe, the TT-Plus partnership organised focus groups with training practitioners and other training professionals in the different participating countries. The focus groups were intended to elicit feedback on the Framework.

In terms of methodology, focus groups can be seen as a social research method through which several individuals get together and are, simultaneously and systematically, questioned about one or several issues. The questioning is facilitated by a moderator, usually the researcher, who poses to the group several questions related to his/her hypothesis in order to test them or to get new insights, opinions and thoughts. In order to reach the intended purpose, the focus group has to be composed by individuals with an interest in the issues which are discussed.

The focus groups conducted by the project partners included training professionals, trainers, training researchers, experts from public training support structures, representatives from training regional authorities and from social partner organisations. This chapter provides an overview of the response from the focus group meetings.

### **2. The Relevance of a European Framework for Continuing Professional Development for organisation, trainers and training teams**

The development of a European Framework for Continuing Professional Development to guide the continuing professional development (CPD) of trainers was, in general, considered relevant not only for trainers' organisations but fundamentally for the CPD of the trainers themselves and for the CPD of training teams. However, some training experts and practitioners considered that the European Framework for Continuing Professional Development is not relevant for organisations since, in most cases, they are only interested in the reputation of trainers, leaving responsibility for professional development to the trainers themselves. So, the potentially greatest value of a common Framework for Professional Development of Trainers in Europe is for individual trainers and, probably, for their professional associations.

*The Framework was felt to be comprehensive in addressing the practice, reality and context of training. It also addressed the importance of the CPD for Human Resource development, in*

*general, and for the development of 'trainers' qualification standards', in particular. Defining qualification standards for trainers is important for the professionalisation of training activities and, as a consequence, raises the status of trainers. In this line of reasoning, some experts considered that anything is better than having no system at all for the professional development of trainers. The European Framework for Continuing Professional Development has to have a 'real' value for the training sector, especially for the professional development of trainers, and should avoid being just a charter or a list of competences.*

In some countries, the European Framework for Continuing Professional Development was considered to be important for professional organisations of trainers. In countries with existing formal training of trainers systems, these systems are not able to keep up with changes in terms of new roles and responsibilities that trainers have acquired. In addition, in those same countries, the systems of training of trainers have paid little heed to the importance of individual skill acquisition from work or through informal learning and through the use of ICT for learning.

A European Framework for Continuing Professional Development was also considered to be relevant when training organisations and teams and trainers are aware of the importance of improving quality of the training delivery for company and trainers competitiveness in the market. This is also so when trainers are concerned with their performance and the role it could play in a competitive world. However, the European Framework for Continuing Professional Development may be less relevant to very specialised training organisations because clients are most interested in the specific subjects the organisation is able to train in, rather than in the question of how trainers gain their professional development or whether or not they are certified.

The European Framework for Continuing Professional Development makes no distinction between trainers in public and private sector organisations. However, given the characteristics of the two types of organisation, the implementation of the European Framework for Continuing Professional Development may be carried out differently. For example, in the public sector it could be introduced by a regulatory norm while in the private sector there will probably be the need for raising managers' awareness of the role of the CPD of trainers in the productivity and competitiveness of enterprises.

In summary, it can be said that a common Framework for Professional Development of Trainers in Europe (CPDFW) was consensually considered relevant mainly for individual trainers' CPD. However, there were some reservations about the format of the Framework, with concerns that content need to be available specialist trainers.

*Almost all of participants in the focus groups considered that the development of an accepted common Framework for Professional Development of Trainers in Europe will facilitate trainers' mobility within EU Member States.*

### **3. Issues around the continuing professional development of trainers**

Continuing professional development for trainers is as important as for any other professional occupation. The issue is how trainers may pursue their continuing professional development? Do they need a common framework to guide their professional development? Would they prefer a continuing training programme developed for their particular professional development goals? Do they require an academic degree? Answers to these questions varied among participants in the focus groups.

*For instance, some focus group participants argue that trainers should be judged by their peers and on reputation and their ability to design and deliver training and not on qualifications dreamed up and implemented by bureaucrats, university staff and researchers! It was also pointed out that there is a huge variation in the quality of courses on offer. It was felt that many courses delivered by universities have little relevance for the private sector. In some countries, trainers require certification by a public body. Certification is gained by taking an initial certified training course delivered by an accredited training organisation. In addition, to retain accreditation status a trainer must deliver, in a period of 5 years, a certain amount of training hours. In other countries that type of certification is not needed. The main concern of the focus groups was how to develop high quality trainers. At present some trainers do not have pedagogic or andragogic competences to facilitate the learning of others. The focus groups also drew attention to the role of prior formal and informal learning and networking and partnerships in professional development.*

One question is how the system, or the market, in general, and clients, in particular, know how good trainers are at delivering training or facilitating the learning of others. A strategy (system, standards, indicators, patterns or standards) is needed for describing how good a trainer is. That could be based on indicators or standards to assure that trainers are fit-for-purpose. But this idea brings with itself the 'competence' issue. For some participants, the competence approach is too simplistic and by definition must be based on the idea of what being 'competent' means. Being competent may either mean that everything is reduced to the level of lowest common denominator or imply that particular characteristics are reflected in the training activity. Besides this, there is a strong distinction in terms of skills, competences and learning strategies between trainers and facilitators.

All these issues lead to the question of "Should training be a regulated profession or occupation?" There is not a consensus on that issue. Some participants were of the opinion that trainers should, like teachers, constitute a regulated profession but others were opposed. It was pointed out that most training is delivered by part-time trainers who have another occupation.

#### **4. Promoting, disseminating and applying the European Framework for Continuing Professional Development**

In general, the focus group participants were not only interested in promoting and applying the European Framework for Continuing Professional Development on an individual basis for their own professional development but were also interested in promoting it in their organisations. However, the way they would apply the framework varies from individual to individual and organisation to organisation depending on the nature of the organisation and the context of training practice.

*It was recognised that the European Framework for Continuing Professional Development is an innovation and may be seen a threat to some individuals in the organisation. For instance, managers in SMEs with less than 10 employees (micro-businesses) are not aware or do not believe in the role training plays in business competitiveness.*

*In each of the participant countries, focus group participants have identified organisations that may be interested in further developing and piloting Framework.*

*Among those organisations are Trainers Associations, Trade Unions, and public bodies responsible for training certification and accreditation, Chambers of Trade, Commerce and Industry, Colleges of Further Education, professional bodies in the training and teaching sector, public sector organisation training departments, municipalities, private training companies, universities and other Higher Education institutions, among others.*

## **5. The approach to European cooperation for the Professional Development of Trainers**

*Most of the focus group participants agreed that in order to promote European cooperation in the Professional Development of Trainers a universal model is needed. The European Framework for Continuing Professional Development was felt to be a very good instrument to promote and develop cooperation. However, while the model provides evidence of commitment to a staff development process, it does not appear to guarantee the quality of the trainer.*

In some countries, training in the private sector training is far better than in public sector education. In others, this is not so. This led to the question of how the Framework could be used to transfer standards from one sector to another? Should the Framework have considered different commitments for private and public sectors, rather than different commitments for different actors?

The levels in the Framework should reflect the reality that different types of trainers do different things, and, in consequence, need different types and amounts of professional development. For that reason, the fact that the model may be scaled up or down appears to be a good feature. This area required further analysis. Although the idea that many people are 'trainers' in different situations may be considered good, one should not forget that there is still big differences in terms of training between a person who coaches another person for a few minutes at a time and the top level trainer / facilitator who runs a five day residential course for top managers!

European cooperation could also consider the two main previous approaches to developing European frameworks:

- The input-oriented approach of the Bologna process for creating common degree structures in higher education, and
- The outcome-oriented approach of the Copenhagen process for relating contextually different vocational qualifications to a common meta-framework (with common levels and performance criteria).

In addition, two corollary approaches were mentioned regarding the integration of "teachers and trainers" into such frameworks:

- The European Commission approach to develop common principles for teacher education;
- The approach by Cedefop sponsored studies to develop common European competence requirements for different training-related professions or functions.

*Participants in the focus groups in some countries, such as Germany, were critical of the European Commission and Cedefop approaches. They were concerned that the hierarchical nature of the EQF does not consider the development of verbal and communicative competences in the context of vocational and professional learning*

*careers. The German experts were much less critical of the Bologna Process. In general they supported the European Framework for Continuing Professional Development as an appropriate approach to developing occupational competence.*

## **6. Developing and Implementing the European Framework for Continuing Professional Development**

There were a number of common points which arose from the focus groups concerning the future development of the European Framework for Continuing Professional Development:

1. The participants from non-native English speaking countries were not comfortable with the word 'Framework' which would appear to have different connotative meanings in different languages. The term 'Reference Guide' was suggested.
2. The European Framework for Continuing Professional Development should be open in its development. Weaknesses and strengths will only be detected during its implementation.
3. The European Framework for Continuing Professional Development should be primarily oriented towards training practice.
4. The European Framework for Continuing Professional Development should be flexible by nature and accessible to all trainers.
5. The European Framework for Continuing Professional Development should be used for the accreditation of training companies and the certification of trainers.
6. The European Framework for Continuing Professional Development should be used to promote the mobility of trainers between EU Member States.
7. The European Framework for Continuing Professional Development should consider trainer's experience (measured in number of training hours).
8. The European Framework for Continuing Professional Development should integrate evaluation ratings from trainees and trainers' self-evaluation;
9. List of competences and skills should be avoided, but inclusion of 'clusters' of essential competences and skills would be valuable.
10. The European Framework for Continuing Professional Development should facilitate trainers' professionalisation;
11. The European Framework for Continuing Professional Development should recognize prior, non-formal and informal learning and the importance of networking and partnerships
12. A programme should be developed for piloting the Framework.

## CHAPTER 6 - EUROPEAN QUALIFICATION FRAMEWORKS AND THE TRAINING OF TRAINERS

**Pekka Kämäräinen, Institut Technik und Bildung**

### 1. Introduction

In the 2004 the European Commission (DG EAC) commissioned a monitoring study on the attainment of the Lisbon goals in the field of VET.

This was followed by initiatives to promote the professional development of teachers. A working group prepared a draft document on common European principles for professional development for teachers and the principles were included as key elements in the Communication from the Commission to the Council and the European Parliament “*Improving the quality of teacher education*” (COM (2007)392).

However, there has been no equivalent initiative for vocational trainers.

There have been a number of studies and pilot projects as well as work commissioned by Cedefop and DG EAC. These studies can be grouped as follows:

- *Country studies* providing background material for further comparisons, contrasts and policy-related conclusions.
- *Concept studies* providing theoretically and empirically focused background material for emerging change agendas.
- *Profiling studies* serving as feasibility studies for new policies that are being shaped but have not reached the phase of maturity.
- *Pilot studies* serving as feasibility studies for new policies that are becoming ready for small-scale implementation.
- *Accompanying studies* providing feedback on contradictions, modifications and learning processes in the process of implementation.

The aim of the TTPlus project was not to provide representative overviews of country developments or to undertake a feasibility study for a policy approach regarding the training of trainers or professional development of trainers. The project wished to explore how the analyses of the professional situation of trainers could be used as a basis for joint European measures to support the professional development of trainers.

The project design focused on the process, practice and context of training in the different partner countries and on the different policy contexts and initiatives regarding the training and professional development of trainers.

This analysis formed the basis for the development of a Framework for the Continuing Professional Development of Training, as described in the previous chapter of this book.

This chapter examines possible articulations between the Framework, as represented in the practice of training and the European Qualification Framework (EQF). In particular we are interested as to whether the European Qualification Frameworks can contribute to a support environment for effective measures to promote professional development of trainers.

## 2. Higher Education, Vocational Education and Training and Competence-Based Curricula

The Bologna process governs relationships between Higher Education institutions in Europe. The process was initiated by an agreement between the different institutions and is leading to the development of a standard system of higher education qualifications and to a credit system recognised between institutions and countries. It is important to note that universities throughout Europe already shared common traditions and cultures. Furthermore there was a growing interest in developing trans-national mobility in higher education.

However, the process is not without problems. One issue is which institutions should be considered as being part of the higher education system? The academisation of higher vocational education and a tendency towards academic drift across the educational systems has been reflected in the repositioning of institutions previously positioned between universities and VET colleges. Colleges providing teacher education have opted for affiliation with universities or with multi-disciplinary Higher Education Institutes (HEI).

The former Polytechnics in the UK had already been upgraded into universities, prior to the Bologna process. In other countries the respective institutions (e.g. the German Fachhochschulen, the Dutch HBO-Institutes and the Finnish AMK-Institutes) have repositioned themselves as Universities of Applied Sciences. Furthermore, in many countries bilateral agreements have been made between universities and other Higher Education Institutes for the mutual recognition of Bachelor degrees and on credit transfer.

There is a growing debate over the role of competence based curricula and modular structures, particularly for Bachelor degrees. In those countries in which a Masters degree was previously the initial qualification, there has been a tendency to regard Bachelor degrees as just a first step towards a Masters qualification. However in countries like Germany, there is now a requirement that Bachelor degrees should develop competences, thus leading to a consideration of the vocational and professional relevance of Bachelor degrees and the implications for curricula (Gerholz and Sloane, 2008).

At the same time policies for lifelong learning have introduced the issue of vocational progression routes and the recognition of prior learning within higher education.

## 3. Higher Education and the Professional Development of Teachers and Trainers

Currently the vocational teacher education programmes in Europe are based on conceptually different models regarding the role of subject disciplines, pedagogic competences and 'work process knowledge'.

In some countries vocational teacher education is based on pedagogic upgrading/conversion schemes for subject discipline specialists with work experience. In other countries, vocational teacher education is a special option related to the curricula of subject disciplines (pedagogy of commercial education; pedagogy of technical education).

In some countries, vocational teacher education is seen as a basis for developing domain-specific and transversal research disciplines with a focus on vocational and work process-oriented learning ('vocational disciplines' and 'vocational pedagogy').

There are a number of Higher Education programmes that incorporate 'training of trainers' provision within university degree programmes. In Germany the AEVO trainers qualification is part of HRD and HRM degree programmes provided by the Fachhochschulen.

Advanced training qualifications may also be recognised as access routes to Bachelor programmes taking into account prior learning.

There appears to be a general tendency towards a polarisation between the professionalisation of teacher education (including some forms of vocational teacher education) through Bachelors and Masters degrees within Higher Education and the semi-professionalisation of training of trainers on the basis of training schemes that may be incorporated into academic degrees but do not provide a basis for career progression within the European Higher Education Area.

Consequently, the European Qualification Framework for HE (in its current phase of implementation) does not appear to offer a prospect for promoting parity of esteem between teacher education and the training of trainers.

#### **4. The European Qualification Framework for Lifelong Learning (the Copenhagen process)**

In this section we will examine whether the Copenhagen process and the European Qualification Framework for Lifelong Learning can provide an effective support environment for the professionalisation of trainers and whether the European Qualification Framework for Lifelong Learning can provide guidelines for Europe-wide developments that enhance the standing of trainers.

Whilst the Copenhagen process is closely related to the Bologna process there are some important differences. In contrast to the Bologna process, the Copenhagen process has had to deal with the diversity of VET systems and with difficulties in promoting trans-national transparency. Therefore, the process has worked on a meta-level that can be addressed from different nation qualification systems. However, this has made it difficult to anticipate what impact the EQF will have on the different education and training cultures.

Instead of providing a common reform agenda the EQF provides a reference structure for the national qualification frameworks (NQF) and sectoral qualification frameworks (SQF) which are expected to use common descriptors and qualification levels.

The Copenhagen process also aims to develop a European Credit Transfer system for VET (ECVET) and to joint networks for promoting quality management in VET.

Whilst the Bologna process has been consensual at the level of policy development and inter-institutional cooperation, the Copenhagen process has been far more problematic with a shift of debate from the EU level towards national policy shaping and towards the role of the NQFs.

#### **5. Implications for the professional development of teachers and trainers**

It seems unlikely that the introduction of the EQF and the subsequent development of the NQFs will lead to the development of European models for regulating trainers' competences

through the EQF levels and descriptors. However, the Cedefop project 'Defining VET professions' has set out to develop common European profiles for VET professionals. The project has selected six VET related professions and working groups are developing common European competence profiles. These professions are:

- IVET Teacher (Teacher for school/ training centre; contributes primarily to initial VET),
- IVET Trainer (Trainer in enterprise/ training centre; contributes primarily to initial VET),
- IVET Principal (Training manager in school/ training centre; contributes to initial VET),
- CVET Trainer (Trainer in enterprise/ training centre; contributes mainly to continuing VET and/or continuing professional development),
- CVET e-tutor/e-trainer (Trainer in enterprise/ training centre; contributes primarily to learning and professional development related to e-resources),
- CVET consultant (External service provider, supports enterprises and training centres in the development of training and related services).

The working groups have developed mutually comparable competence statements for each profile by using the EQF descriptors for knowledge, skills and competences. This work is seen as a starting point for developing a framework for training the trainers. However, this work is still ongoing and it is open as to how far it will progress.

A second possible development stemming from the implementation of NVQs is the bringing together of previously separate qualification systems and vocational pathways with different target groups and learning cultures. With the introduction of more flexible modular qualifications and of credit systems this could offer possibilities for new programmes for the training of trainers within particular subject areas. However, it is too early as yet to judge how successful such an approach may be.

## 6. The limits of European qualification frameworks

What kind of combined effect will the two parallel European qualification frameworks have on the professional development of teachers and trainers? To an extent this depends not just on the frameworks as such, but on the implementation processes (at different levels) and of the possibilities for teachers and trainers professional organisations and communities to influence the framework processes.

If European policies seek to develop coherent and coordinated measures that support the professional development of teachers and trainers, the current phase of implementing European Qualification Frameworks would not appear to be helping. The implementation of the Bologna process is emphasising the dividing lines between teacher education and the training of trainers. The implementation of the European Qualification Framework for Lifelong Learning has not as yet led to Europe wide moves to upgrade the training of trainers. However, since the Copenhagen process is shifting the emphasis to the development of National Qualification Frameworks, it is worth looking at how this work can support the professional development of trainers.

## **7. The potential role of NQFs in supporting the professional development of trainers**

One possible result of the introduction of National Qualification Frameworks could be the development of regulatory measures to set basic standards and to monitor the quality of trainers.

This could include mandatory qualifications for trainers or the introduction of quality assurance systems for publicly supported training and registers of qualified training providers and trainers.

However, empirical studies and policy analyses undertaken by the TTplus project suggest that these instruments alone are not enough to support the long-term professional development of trainers.

The main aim of the NQFs is to create transparency between national and sector qualification systems. It is not clear how much emphasis there will be on reviewing the role of individual qualifications and qualification routes and on introducing quality assurance measures.

The TTPlus project has identified a number of initiatives to develop qualification structures with progression routes based on intermediate and higher qualifications for training specialists and to integrate formal and non-formal learning. It has also looked at measures to incorporate the recognition of prior learning within the qualification structures and career models for training specialists. However such measures tend to be highly context specific and are not widely disseminated. To date, such initiatives have not become central elements of policy agendas.

Concerning the potential role of NQFs, it is not clear to what extent government policies are addressing articulation between different education sectors (VET and HE) and of the role of the recognition of prior learning. In the countries in which there are pilot activities in this area, it is possible to examine qualification models for training specialists. The EQF instruments have been mainly designed to create transparency within and between competence domains. However, the competence profiles of trainers are not merely compilations of domain competences. Instead, the trainers' competences are characterised by interfaces, overlaps and bridging activities. Therefore, it is difficult to use the EQF descriptors to grasp the specific characteristics of training related competences.

The empirical studies and expert meetings of the TTplus project have revealed a considerable interest in community driven initiatives by trainers and professional groups of trainers to develop opportunities for professional development. This includes peer evaluation and community based certification as well as shared knowledge resources. This interest is most obvious in countries in which there are policy gaps for the training of trainers or in which the policies cover only certain fields of training. However, the interest in such initiatives may also be related to the lack of advanced provision for training specialists. The process of developing the NQFs may serve as an indirect stimulus for such initiatives, if the qualification frameworks fail to address the professional development of trainers.

## 8. From qualification frameworks to a common area for learning and professional development

The approach of the TTT Plus project to the professional development of trainers has been to attempt to look beyond qualification frameworks towards the development of a common area for learning and professional development. In so doing we are aware that different training cultures and policy contexts provide different preconditions for the professional development of trainers. The TTplus framework is based on:

- A set of core principles that highlight common issues (for in-company trainers, external service providers and other training specialists) for the professional development of trainers.
- A set of basic commitments that link individual trainers, teams, employers and trade unions, intermediary agencies and government bodies to common developmental agendas.
- A set of optional implementation strategies that take into account different possibilities for the role of trainers' professional associations (community-based approach), for negotiations between service providers and users or training (market-oriented approach) and for the role of public policies (system-oriented approach).
- A set of common proposals for the accreditation/recognition of trainers' competences that link the validation, assessment and recognition of trainers' experience-based learning and growth of competences to training measures and/or to other support for professional development.

This approach takes the commitments and interests of trainers as the starting point for the professional development of trainers. It is left open for the users to clarify whether the trainers seek to develop themselves as trainers within their occupational fields, as advanced specialists in the design and management of training or as external training service providers.

The approach also recognises the commitments of other organisational actors (employers, trade union representatives) and other societal actors (intermediate agencies, government bodies and social partner organisations) in creating a support environment. This approach avoids avoid the risk of giving particular authorities or stakeholders the exclusive ownership of the trainers' area for learning and professional development.

The Ttplus project has not developed a specific approach to trainers' competences (either in terms of domain-specific competence or in terms of cross-cutting competences). We wish to avoid debates about what specific competences should be included in any framework, being more concerned at this stage in developing a framework for learning. However, the expert meetings and interviews have suggested developing an approach to 'competence families' or 'competence clusters' for the professional development of trainers.

## CHAPTER 7 - VALUING DIVERSITY IN THE PROFESSIONAL DEVELOPMENT OF TRAINERS

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### **1. Introduction**

Equal opportunities in the professional development of trainers was one theme which ran through all the research and development work undertaken by the TTPlus project. The equal opportunities dimension of training practice cannot be understood without considering the cultural and social environment in which a trainer is practicing: culture regarding the role of trainer, the status of a trainer in a specific society or community, the organisational model of the institutions providing training and general perceptions, expectations and practices of equal opportunities in different societies. Although many VET research papers take into consideration the equal opportunities factor in analysing training profiles, achievements or performances, the equal opportunities dimension in training practice is often implicit. Apart from an interest in looking at specific contexts with the aim of making proposals for appropriate professional development frameworks for trainers, the TTPlus project aimed explicitly to identify the equal opportunities features in training practices in different countries and to develop a research methodology for a deeper enquiry into this issue. This chapter synthesizes the research methodology and outcomes around the topic of equal opportunities in the professional development and practice of trainers in the workplace.

### **2. Methodological considerations**

The case studies undertaken by the project demonstrated that the title of 'trainer' may cover a very broad typology of status, role, personal interests, teaching styles, training approaches, personal career goals and personal learning pathways. Trainers may be men or women, teachers or mentors, facilitators or peers, moderators or coach. Trainers may work as internal or external staff, may be a part of a professional training organisation, may be employed by a company or could be freelancers. Learners are also different in many ways (cultural background, ethnicity, level of education, skills that have to be developed, goals etc.). The trainer may be an expert in content, but may just be an expert in training. And the list of diversity could go on.

In other words, diversity in the trainer's world could be characterized by a complex group of factors: cultural, organisational, social or individual. One of the initial questions for the project was related to the opportunities that trainers have for their personal career development and to what extent those opportunities are equal regardless of the trainer profile. Expanding this initial question in a more detailed way, we can ask at least three additional questions: what are the policies and practices addressing the diversity of trainers in Europe? How is equal

opportunity mainstreaming for trainers applied at the level of different organisations? What are the main outcomes and impact of implementing (or not) equal opportunities mainstreaming on the trainers' personal development?

In order to investigate those questions, we developed an interview guide addressed to the main stakeholders in training in all partner countries. The goal of the interviews was to understand how mainstreaming equal opportunities impacts on the training of trainers in Europe. We proposed the following understanding of equal opportunities for trainers:

- Equal access to information and resources related to training opportunities;
- Relevant training content, related to the practical and social experience of the trainer;
- Equal opportunities for assessment, validation and recognition of competences and skills;
- Equal opportunities for personal and career development.

The following questions on mainstreaming equal opportunities in the training of trainers were addressed during the interviews:

- How accessible is the training to different categories and profiles of trainers? (What type of policies and strategies are developed in order to address the equal opportunities dimension in the training profession? Are there any specific recruitment and selection strategies targeted to ensure access to developing a training career, regardless of gender, ethnicity, age or nationality? Which are the most common strategies and tools for sharing information and resources between trainers, at all levels and / or organisations?)
- How relevant is the training content for the trainers?
- Are the strategies and tools for assessment, validation and recognition of competences sufficiently flexible to value the training skills and performances of all trainers in different contexts and situations?
- What is the main impact of mainstreaming equal opportunities in the different case studies?

The interview guide was addressed to stakeholders and each partner interviewed at least two stakeholders in each partner country. The stakeholders were policy makers - association of training organisations, trade unions, trainers' associations, NGOs working in the field of equal opportunities, community representatives concerned with equal opportunities issues etc. Each partner focused on one or more specific issue related to the diversity of trainers and equal opportunities. In one case this could be gender, in another nationality or cultural differences.

The stakeholders were selected on the basis of their interest in one or more of the issues related to the mainstreaming of equal opportunities. We also took into consideration that equal opportunities is related to levels of awareness, of understanding, and to culture and personal perception.

### 3. Research Results

#### 3.1 Dilemmas and contradictions in equal opportunities

Action for “Equal Opportunities” remains a problematic issue in many organisations. Many of the stakeholders interviewed raised interesting questions for research, practice and policy. The most important dilemmas or contradictions arising from the interviews are presented in the following section.

#### **Explicit versus implicit policies for mainstreaming equal opportunities**

The interviews with stakeholders in the six European countries show a great variety regarding the level of policy development in equal opportunities. In some countries, like UK or Netherlands, the policy on equal opportunities is highly formalised and is supported by specific regulations, strategies, funding and organisations. In other countries like Portugal, Romania or Germany, equal opportunities in companies is focused on a more narrow policy perspective, around issues such as ethnic minorities, gender or disabled people.

Our research suggests that the equal opportunities agenda for trainers is implicit and tends to be limited to contextualized and specific measures such as developing a curriculum for trainers on diversity issues (UK, Holland, Romania), the selection of trainers with international experience and competence in foreign languages (Greece, UK) or awareness measures and the provision of information for the training community (UK, Germany, Romania, Holland).

Furthermore, some companies preferred an implicit policy towards equal opportunities as against an explicit strategy, fearing reverse discrimination or segregation: *“This autumn the strategies towards diversity will be adjusted. No special diversity policy is applied, because we think applying a diversity policy (with rules like: “so many per cent need to have a different ethnic background” etc.) will lead to segregation. The topic of equal opportunities needs to be integrated in the personnel policy itself. There is a need for a balance in the attention given to equal opportunities, as too much attention may lead to unequal opportunities.* (Netherlands, interview with a company stakeholder).

#### **Formal implementation versus real needs and understanding of the issue of equal opportunities in the training profession**

In some cases, the stakeholders expressed concerns regarding the formal implementation of different policies and strategies on equal opportunities. Some said that a policy in itself is not useful if it does not respond to a clear need in the company or the need is not perceived as a problem by its members: *“In general I think it’s not useful to focus on diversity when the organisation doesn’t feel an internal need to do so. Measurements that are taken only to be (politically) correct, will never work.* (Netherlands, interview with a company stakeholder).

Moreover, in some cases the stakeholders were concerned with the danger of the ‘formal’ implementation of the policy, as opposed to a real understanding of the issue: *“I worry sometimes that the responses are informed too much by the need to make sure they don’t break the law, rather than saying why they’re really doing it.* (UK, interview with a company stakeholder).

**Efficiency versus equity**

Diversity did not appear to be an issue in the recruitment of trainers. Some companies were primarily interested to recruit and select “...*the qualitatively best and cheapest trainers, as they see training as a factor enhancing productivity and quality but also as a cost factor. In this context diversity is not a central policy [...] Efficiency is the overall doctrine of today's organization. This doctrine exists also in the employment of trainers.*” (External observer, Greece).

In another case, one of the stakeholders interviewed said that most probably the trainers are “*white indigenous people in a good healthy condition*” and it was rare that a trainer would come from a different background. Only in one case did the recruitment strategy for trainers take into consideration equal opportunities. In some cases, the stakeholders had considered the issue: “*The training coordinator selects an appropriate trainer when needed. No special diversity programme is applied in this selection or recruitment procedure. The matter should get more attention. It is possible there are unequal chances for trainers unintentionally.*” (Netherlands, interview with stakeholder).

**Diversity – issue to be resolved or prerequisite for social innovation?**

In almost all our cases, the stakeholders recognised that equal opportunity is an issue in today's society. For some, equal opportunities is seen as an issue of gender balance, ethnicity or sexual orientation. In one case, there was an explicit policy for diversity and the recruitment and selection strategy for trainers was seen as a tool for social innovation: “*The diversity of the trainees and trainers reduces the problem of competition and ensures a more collaborative situation. Diversity research has shown in various cases that heterogeneous groups are better able to find innovative solutions, produce more results and people are more satisfied with the outcomes. The diversity approach of the programme seems to fit perfectly to its unambiguous goal.*” (UK, interview with stakeholder).

**Pro-active versus reactive measures in mainstreaming equal opportunities**

Stakeholders tended to be reserved as to the relevance of the issue of equal opportunities for trainers in companies. Whilst equal opportunities was an issue for trainees, the development and support of trainers was seen as outside the equal opportunity discussion. However, the majority of those interviewed agreed that awareness measures, discussion and information are needed to develop policy in this area. Almost all of those interviewed were in favour of a more proactive approach to the issue, instead of the present reactive approach.

*“I think if organisations actually develop what they do and understand the issue of diversity they are more likely to get the outputs reflecting those needs and for example be aware of the need to be flexible in terms of the timing of training and so on. [...]. So I think it is all part of the design process really and helping people to understand that when you're developing something you think more widely than you do otherwise. It is wrong to assume that everybody is the same because they're not and everybody has the same needs because they don't. I think there are probably a lot more things to be done to enable people in all professional areas to understand what we're talking about. I think that there aren't any easy answers or simple solutions on equal opportunities.”* (UK, interview with stakeholder).

*It's the way you engage everybody's understanding with what this complex stuff is about, in a way that doesn't scare them off and in a way that makes them understand that it is not simply about certain narrow dimensions, it is not just about gender and so on. It is about a much broader agenda of issues. People have to realise that they have a personal interest, even if they are not older or even if they are not married or they don't have a disability. Everybody thinks it is about someone else and is nothing to do with them which is not the case. It is important to develop the intercultural competences of trainers. The challenges of the multicultural working environment are to make a bridge between people, to be open and interested and to have open discussions. (Netherlands, interview with stakeholder).*

#### **4. Equal Opportunities in Practice – Six Possible Scenarios**

The research into equal opportunities followed the general methodological approach of the Ttplus project, based on the development of scenarios based on practice. In the following section we have developed six scenarios of practice, derived from the interviews with stakeholders in Portugal, Greece, the UK, Germany, Romania and Portugal. The presentation of each scenario is structured as follows:

- Brief details of the context for the scenario
- What problem(s) does the scenario address?
- How does the scenario resolve the problem(s)
- The stakeholder perspective on the experience and process
- The story from the perspective of an external observer

*SCENARIO 1. Ensuring the diversity of trainees and trainers – the development of an explicit policy for the recruitment of trainers*

##### **Brief details of the context for the scenario**

The stakeholder represents a charity organisation with the aim of improving the quality of the health sector in the UK. The current training schemes are ambitious: their aim is to improve the quality of the service for the patient. The organisation is independent and the board has the role of linking developmental activities to policy. Training is highly valued in the organisation and each member of staff has an individual budget for training.

##### **What problem(s) does the scenario address?**

How to increase the quality of the service for patients through training policies? How training policy may approach the diversity of the trainees (in terms of qualifications / positions, gender, ethnicity, geographical residence.)

##### **How does the scenario resolve the problem(s)?**

The training scheme is called the "fellow leadership" programme and aims to improve the leadership qualities of participants in order to develop better patient health relations. The

training scheme has run every two years for the past 12 years. Each course has 16 participants.

The selection process for the programme is quite strict:

*a formal application must be provided and must be supported by a line manager and the chief executive of the organisation. Four programme managers look through the applications and produce a written report for each application. 30 people were short listed this year from 86 initial applications.*

In the second stage those short listed fill in two online questionnaires.

This is followed by two days attendance at an assessment centre looking at verbal reasoning skills, intellectual flexibility, group communication etc.

The assessment process aims to ensure diversity of the trainees. 16 people are finally chosen - not necessarily the best candidates but those that will fulfil the aim of a group with a mix of qualifications / positions, gender, ethnicity, geographical distribution etc.

The organisation has a pool of 13 trainers / consultants, three of whom were specifically selected to ensure ethnic diversity.

### **The stakeholder perspective on the experiences and process**

The diversity of the trainees enables the establishment and development of a network throughout the whole training scheme, across institutions, professions, and regions. For trainees it is easier to connect to people with the same professional background, but since there will not more than two people of the same profession in one cohort, trainees network with colleagues from different training cohorts.

This will lead to the establishment of networks across organisations, regions, and trainee programmes. The leadership fellow programme does not narrow or limit the work to specific areas, e.g. to improve the service for patients with chronic diseases. It is up to the trainee to choose in which field he or she wishes to be active.

The diversity of the trainees helps in developing and exchanging knowledge across different specialities. It also reduces competition and ensures a more collaborative working environment. Diversity research has shown that heterogeneous groups are better able to find innovative solutions and people are more satisfied with the outcomes.

### **The story from the perspective of an external observer**

The diversity of the trainers is a direct result of:

- The training programme. A focus on the provision of health care for ethnic minorities has led to the recruitment of trainers from ethnic minority groups.
- The diversity of the participants. Two trainers – one male and one female - are allocated to each training programme. The aim of ensuring diversity of participants has led to the aim of developing diversity in the pool of trainers.

*SCENARIO II. Moving from Implicit to explicit diversity policies – awareness, planning and networking for equal opportunities*

**Brief details of the context for the scenario**

The person interviewed is the coordinator for equal opportunities. She started in the organisation as a communications teacher and subsequently carried out a project on intercultural relations and ethnic diversity. Her job involves identifying where attention to equal opportunities is needed, in what ways and what problems should be addressed. Equal opportunities is one of the five core topics for the organisation.

**What problem(s) does the scenario address?**

Equal opportunities requires more attention. Although diversity is a core topic in the company, there is little attention to diversity of trainers and no specific selection procedures to ensure diversity.

**How does the scenario resolve the problem(s)**

It is recognised that equal opportunities is an important issue and it is being discussed at senior management level. There is also a slow movement towards less gender specific job divisions.

Every region is responsible for developing measures for diversity. Course developers are provided with training in diversity, which is being reflected through the incorporation of equal opportunities issues in course provision.

The organisation is also involved in the development of equal opportunity policies at the national and international level.

**The stakeholder perspective on the experiences and process**

The topic of equal opportunities needs to be integrated in the personnel policy. The main strategy now is awareness raising. Every region of the organisation has managers or consultants responsible for the issue of diversity.

The issue is regularly discussed at senior management meetings. The organisation aims to recruit more people from ethnic minorities and to ensure more women become managers.

There is a special entry route for people for ethnic minorities who wish to become trainers. Those selected under this programme spend two years working on different projects in the organisation.

**The story from the perspective of an external observer**

Despite the formal policy on equal opportunities, practice is still dependent on the level of awareness and information in the company. There is a clear interest in the issue, but it is still too early to measure the impact for trainers.

*Scenario III. Curriculum development in diversity for trainers –  
a response to emerging market requirements*

**Brief details of the context for the scenario**

The interviewee is a development manager with a special interest in diversity and equal opportunities. She works for a large training company. She is responsible for needs analysis and developing programmes around equal opportunities issues. Her primary focus is external training programmes.

**What problem(s) does the scenario address?**

There is market demand for training programmes on diversity issues.

**How does the scenario resolve the problem(s)?**

The company has developed training programmes on intercultural competences for all trainers in the company. One of the goals is to be more sensitive to cultural differences. There is also training in language skills.

**The stakeholder perspective on the experiences and process**

I am not familiar with internal policy on the diversity subject. I think that there has been little attention because there was no need for it. It becomes interesting for the company if it has commercial potential.

In general, I think it is not useful to focus on diversity when the organisation feels no internal need to do this. Measures that are taken only to be (politically) correct, will never work.

With our general selection strategy we will recruit mostly white Dutch people. This is not because we discriminate but because there are few highly educated trainers/psychologist with a different cultural background. The international department selects people who speak different languages and people with international experience. In this department the share of people with a different background is bigger.

I still ask myself if we need to do something different? If it is about creating a more diverse pool of trainers, the best way is to adjust the recruitment strategy to these special groups. Until now, there was no need to do this. In general, I think it is important to develop the intercultural competences of trainers. The challenges of the multicultural working environment are to make a bridge between people, to be open and interested and to have open discussions.

**The story from the perspective of an external observer**

The organisation is reactive to the issue of equal opportunities as a response to the training market. The principle of diversity is more likely to be an implicit one, as there is no financial or strategic concern at the level of company management.

*SCENARIO IV. "Girl's day campaigns" – trainers involved in measures to attract females to traditionally male dominated jobs*

**Brief details of the context for the scenario**

The companies visited focused on training in electrical occupations. This sector based on typically male-dominated occupations.

Regarding the training for commercial occupations there appeared to be a relatively equal gender balance – both regarding the trainees and the trainers. In the metal and electric occupations the workforce was male-dominated. Yet, in particular in the electric occupations, there was an increase in the number of women applying for training opportunities and accepted as trainees.

**What problem(s) does the scenario address?**

Both in the metal and electric occupations the workforce was male-dominated.

**How does the scenario resolve the problem(s)?**

The companies were actively involved in the Girls Days campaigns. Furthermore, given the increasing number of female trainees, the training philosophy emphasised the importance of sharing responsibilities, working in teams and taking into account possibilities to undertake different tasks.

**The stakeholder perspective on the experiences and process**

The male trainees need to be reminded that their female fellow trainees may not be able to undertake some tasks due to physiological reasons. Therefore, 'equal treatment' should give way to 'equal opportunities'.

**The story from the perspective of an external observer**

The sample companies were not deliberately opting for gender segregation in different occupational fields but did not regard it as a problem as long as there were good applicants. The companies were involved in the "Girls' Days" campaigns but did not see that they should have a responsibility to take extra efforts beyond this.

*SCENARIO V. Implicit diversity policy: "train the trainers" in issues related to specific target groups (woman, ex-prisoners, and people with disabilities)*

**Brief details of the context for the scenario**

The scenario is based on the findings of the interviews we conducted in three case studies in companies (a shipping firm, an informatics firm and a training company). The scenario also uses information collected during two other interviews with specialists in the training departments in the general associations of employers and employees.

Diversity is a noticeable phenomenon but it seems not to be a result of policy. It happened by chance since firms tend to employ the qualitatively best and, in economic terms, cheapest trainers, as they see training as a factor enhancing productivity and quality but also as a cost factor. In this context diversity is not a central policy. It was different in the past decades, in periods where the state owned firms were leading some sectors of economy (energy, telecommunication, but also banks, insurances, shipyards etc.) In many of these firms there was at that time positive discrimination for women employees. This ceased when these firms were privatised.

**What problem(s) does the scenario address?**

The diversity of trainees and the international background of clients is an issue for companies involved in the case.

**How does the scenario resolve the problem(s)?**

Continuing professional development programmes have been developed for trainers around issues such as gender and inter cultural relations and also for subjects such as training ex-prisoners and people with specific abilities.

Many trainers are women (mainly in fields that have to do with the enhancement of social or communication skills). Foreigners are often employed as trainers for training people from different countries especially in the shipping industry.

**The stakeholder perspective on the experiences and process**

We do not have an explicit policy on diversity. Our training curriculum is always adapted to the needs of the trainees. Only in case of specific categories of clients do we take some action in order to offer effective training.

**The story from the perspective of an external observer**

Nowadays, organisations have a purely economic approach to training; that means that diversity measures exist, but not on the basis of explicit policies. Efficiency is the overall doctrine of today's organisation. This doctrine also applies to the employment of trainers.

*SCENARIO VI. Strong equal opportunities policy versus formal response in practice - a reflective approach through studies, information campaigns, workshops and discussions*

**Brief details of the context for the scenario**

The interviewee is a diversity expert from a leading professional body for people involved in management and development. They have over 130000 individual members and provide training and information. They have both a charity section and a commercial section and are actively involved in governmental consultation.

**What problem(s) does the scenario address?**

There are many developments at the national level in the education system and in terms of the responsibilities placed on providers regarding their legal obligations towards diversity

issues. But some of those issues have only been introduced relatively recently and there is a worry sometimes that the responses to this policy are driven by the need to make sure they comply with the law rather than implementing real practice.

#### **How does the scenario resolve the problem(s)**

The company is working on increasing awareness and information by publishing research and advice and guidance which is freely available to the members of the organisation. The guidance and information is meant to help the members practice diversity in their own organisation. The company is acting as a leading edge think tank on diversity issues.

#### **The stakeholder perspective on the experiences and process**

We have a policy document on equal opportunities in which our organisation has articulated what it feels about diversity and valuing people as individuals. Our governance body is looking at what it means for the commercial activities, for membership development and for our research.

The way in which we try and deliver understanding on the subject of diversity is to constantly keep informing people about what diversity is, why it is important and how you can move the agenda forward. We are trying to produce new material, new evidence and new guidance all the time. It is not a static thing and we try to convey a message that it is about managing change and working to very well crafted values.

If you are looking at trainers as employees then obviously you need to make sure that you're not marginalizing a particular group and that there are opportunities to progress.

There are also specialist diversity programmes and we have conferences on diversity issues - we also have forum events where people can come and log in and speak with each other.

If the trainers are going to be successful they are going to need to understand how to relate to their audience, bearing in mind that their audiences are diverse themselves. We have to look at when we offer training – is it accessible?

When we write materials we also are very focused on producing materials which are written in plain English. There are lots of dimensions like that – it is not formulaic but hopefully overtime more and more people will tune in to the fact that we are dealing with people who are different and that is our reality.

#### **The story from the perspective of an external observer**

The issue of the balance between policy and strategies and the real practice on diversity is interesting. There are probably many more things to be done to enable people in all professional areas to understand the real meaning of the policy. The big challenge presented is how people can realise that they have a personal interest, even if they are not older or they do not have a disability. Everybody thinks it is about someone else and nothing to do with them - this is not the case.

## **5. Principles towards equal opportunities mainstreaming in the professional development of trainers**

One of the main goals for the TTplus project was to propose a set of principles for the further development of the training profession in Europe. As far as the equal opportunities issue is concerned, we followed the same general methodological approach as in the rest of the project. Based on the results of the research undertaken in the TTplus project, we propose the following framework principles for continuing professional development of trainers, from the equal opportunities perspective:

### **Awareness on equal opportunity in training professions**

Equal opportunity is an emerging issue in Europe. Trainers are exposed to a diversity of issues connected to equal opportunities including equal access to information and resources related to training opportunities; relevant training content, related to the practical and social experience of the trainer; equal opportunities for assessment, validation and recognition of competences and skills and equal opportunities for personal and career development. These issues are being increasingly recognised but there is a need for more information, debate and reflection on this issue.

### **Proactive equal opportunities measures for trainers**

Even if equal opportunities seems to be largely accepted as a issue regarding the diversity of trainees, the development of the training profession and the qualities of a good trainer rest largely outside the equal opportunity discussion. A more reflective approach may increase awareness and bring more clarity on the issue of equal opportunities.

### **Valuing differences – as a source of social innovation in training**

The diversity of the trainers and their working context in Europe provides access to a pool of innovation. Communities of practice, networking and the sharing of experiences may become one of the most important sources of career development for trainers.

### **Contextualized equal opportunities policy and strategies for trainers**

Our research showed a variety of cases and situations that define the trainer's world, taking into account a complexity of factors: cultural, organisational, social or individual. Policies and measures cannot work if we do not take into consideration all those factors.

## CHAPTER 9 – EVALUATION AND VISUALISATION AS INTERNAL AND EXTERNAL COMMUNICATION AND DISSEMINATION TOOLS

Bernd Baumgartl (navreme) and Camilla Torna (icastic)

### The innovative methodology of the TTplus project

It is worthwhile mentioning that the (preliminary) scenarios and policy documents produced under TT+, and published in this volume, are not based on linear thinking but require balancing between different counterparts and developmental poles. Moreover, it is a peculiar characteristic of the TT+ that it does not base its findings on a compilation or comparison of national situations, as most EU projects do.

In contrast, it focuses on practice in different operational settings of companies throughout Europe – and finds interesting “horizontal” and transnational similarities (e.g. case 2 in county A and case 3 in country D), whereas often the single cases in one given country diverge significantly. Compared to other projects, the respect of partners for each other’s views, the analytical curiosity and flexible methodology has created a number of additional, not planned, outputs. This was also helped by an ongoing “accompanying evaluation” by one project partner.

As an example of supplementary output, when trying to make sense of practices and measures taken at company level, a professional in *visualisation* was invited to help create metaphors and images at the aggregate level. The discussion about and further development of visuals has greatly helped to clarify the message and policy-input of the theoretical considerations and analysis. Some samples of visualisation can be also found in this book; finally, they also greatly enhance dissemination activities.

### Evaluation as (Part of) a Process

*The following definition of evaluation is used for this task:*

“Evaluation is to determine the significance or worth of something by careful appraisal and study. It is a **developmental process** that illuminates or enlightens the specific policies, processes and practice of its stakeholders and contributes to collective learning.”

This definition was agreed within CERN, the Capitalisation and Evaluation Research Network, set up under the EU Leonardo programme, and now registered as a EEIG (European Economic Interest Group). Navreme is a member of CERN.

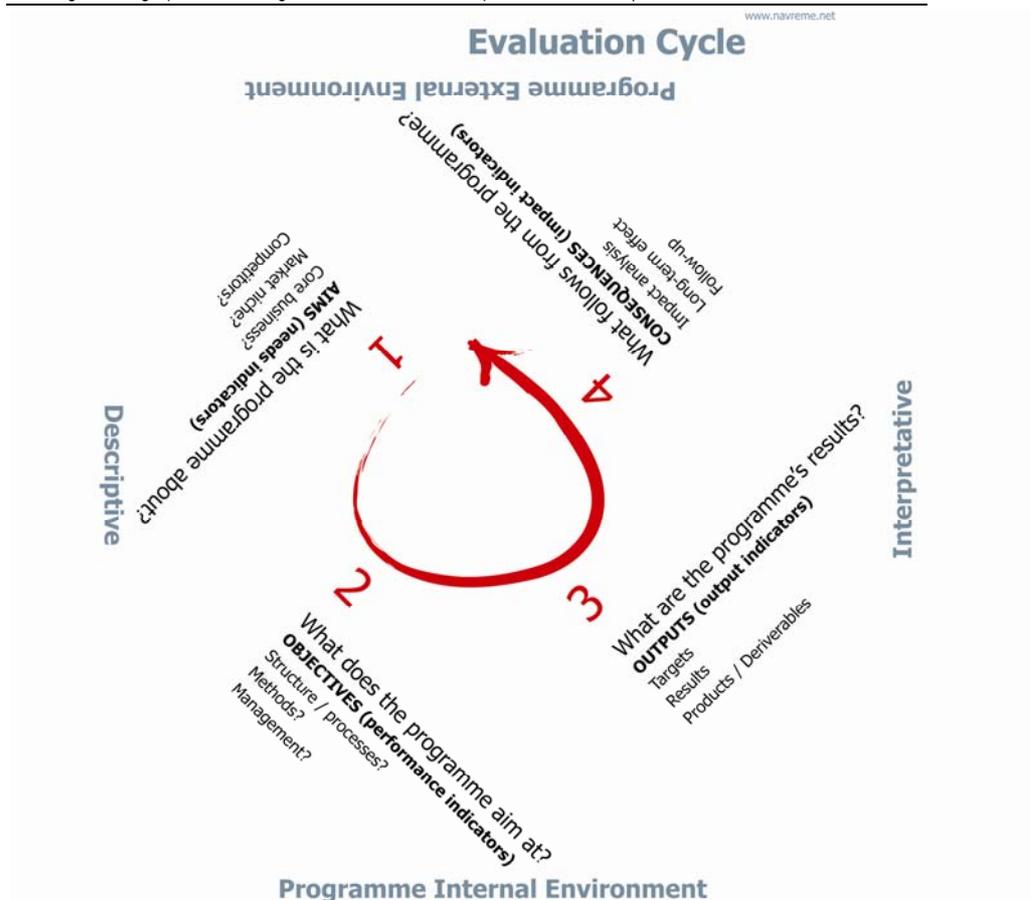
In principle, two over-all objectives as to why evaluations are carried out in the first place can be differentiated: accountability and improvement. While they do not exclude each other, they do call for a different distribution of time and resources during the execution. *Accountability* relates to an "inspectorial" exercise, which seeks justification for an activity undertaken. Depending on the customer, it should investigate if best value was achieved for money invested, or reinforce a "licence for practice" for the organisations. The evaluation provides a "measuring stick" for judgement on the activity. *Improvement* as a main objective, in contrast, means to provide the actors with a thorough review of the achievements against the potential of an activity. An evaluation exercise is principally aiming at providing recommendations for future continuation or repetition of certain activities or programmes. The result of the evaluation is rather a "torch" which allows for illumination and development.

While the accountability dimension is often requested by national or EU legislation, and the need to demonstrate that taxpayers' money was well spent is stressed, it is, however the conviction of the author that the improvement dimension is even more important. Whatever - excellent or disappointing - the results of the project or programme were, policy development and reform continue, and the products of the programme need the utmost valorisation<sup>3</sup> in the present (and future) context. Knowing what happened in the programme is above all a resource for inserting useful input to the national or regional system for its ongoing improvement. Moreover, it is necessary to pay specific attention to the management processes and communication lines between the different institutions and actors in the programme ("paymaster", "provider", and "participants"). All of them need to be consulted and assessed in terms of objectives, performance and outputs. This includes an early investigation on the Policy or Strategy documents itself, and whether they set the right objectives for the given situation and context at a specific point in time. A further important question relates to the point in time at which the evaluation is carried out: as interim, final, ex-post, or accompanying evaluation. Each type of evaluation requested requires different information, methods and outputs to be collected, applied and produced respectively.

The evaluation cycle for projects and programmes is well described in the following scheme. It convincingly argues for the logical sequence of external factors (aims - 1) translated into concrete internal objectives for the programme (2), the pilot programme's internal outputs (3), and their repercussions on the policy system and society in general (impact, often translating into new programmes - 4). While the theoretical understanding of evaluation is closely related to this cyclical improvement mechanism, it remains however clear that the timing, scope and dimensions of most evaluations are far from aiming at such a complex picture (e.g. by developing long-term impact indicators to name but one).

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3 This Euro-speak word (valor = value) circumscribes a concept which combines several notions: e.g. identification of successes and relevant practice ("added value"); development upon project results ("sustainability"); or programming of following activities ("strategic planning").



Most time, however, such evaluations are, unfortunately, carried out at the end of a project, i.e. final evaluations. In other words, it is too late to take corrective action.

### Accompanying Evaluation

In contrast, Accompanying Evaluation is carried out from within a project. Hence, the evaluator is - instead of an external in need to collect information via secondary sources after project activity has happened – one of the project partners, well informed and interested in the success of the project.

An accompanying evaluation exercise, in contrast, starts asking evaluative questions right from the project start. It allows for critical review at an early stage, and helps to undertake corrective action when the reaching of project objectives, outputs, products or deliverables is endangered.

Therefore, the “improvement” function of evaluation is even stronger, and evaluation is a “friendly consulting from within the project”.

Accompanying Evaluation thus looks at the following areas of project results, successes and impacts:

- 1) transfer/development of information
- 2) transfer/development of knowledge
- 3) transfer/development of skills
- 4) transfer/development of attitude
- 5) transfer/change of responsibility
- 6) transfer/change of behaviour
- 7) (transfer of) empowerment

## **Evaluation Criteria**

A choice needs to be made at the beginning of a project together with project partners, what the focus of the evaluation should be. Due to project, time, and budgetary constraints, evaluation everything in detail is not possible. These are some broad categories of evaluation:

### *Product oriented approach*

Evaluating outcomes and results

### *Process oriented approach*

Project management and implementation processes  
Development process – individual and organizational learning  
Do team-members know what they are each responsible for?

### *Empowerment approach*

Measuring the development of our own confidence and competence regarding project aims.

### *Policy-oriented approach*

Validity of findings for + input to policy-making, impact and sustainability

## **Reference Bases**

*Amongst the three types of measuring results for evaluation (criteria-referenced, norm-referenced and ipsitive-referenced), again all three types are implicit in most Terms of Reference: external criteria (the objectives of the programme) were set in accordance with the Strategic Document or work programmes, and need comparison with the results at the end of the programme. However, the view on other programmes (in other sectors; in other regions or countries; or by other donors) indicates the preparation of a judgement on how well this specific programme did as opposed to similar ones. The economic and - above all -*

*political environment which the programme was surrounded and constrained by may have caused the strongest influences of all external factors on the ultimate performance.*

*Finally, a judgment of the internal capacities of the institutions, organisations and people involved is crucial to allow for thorough findings on the performance of the programme - compared to itself. It is illuminative to see how much learning actually took place by the structures and end-users over time; it is equally imperative to see the limitations and borders of the programme; it is crucial to compare the functioning of policy-making before and after the programme; in conclusion, to answer the question if the programme made a difference to the political and social structure as such. Here the critical requirement is to investigate how much the programme experts were able to transfer knowledge to their counter-parts, and how far day-to-day work in the management of the system was improved in a sustainable way.*

## **Evaluation Information**

Participants will be informed by regular evaluation briefs about the progress of the project (and the evaluation), and observations and recommendations by the evaluator. Evaluation Briefs provide a view on project progress, based on 3 reference criteria.

At the same time, evaluation Briefs also serve to ask a selected number of questions to project partners, in order to define jointly what is to be achieved and measured in the evaluation (and the project). Evaluation briefs are usually issued twice a year, preferably after project milestones or workshops.

Moreover, a mid-term evaluation report on project progress was produced in due time, and input to management reports will be provided.

## Visualization

Evaluation has been defined here as a developmental process: as such, in the course of focusing both the accountability but mostly the improvement objective, it proves helpful to break away from linear thinking, formal logic, in a simple word: text. This is usually the purpose of charts and diagrams inserted in papers: the distribution of concepts in space in order to trigger the unfolding of visions. An attempt, often very shy, to mimic the simultaneous network connections that is daily operated by our thinking brain itself (*synapses*).

The distribution of concepts in space implies a different reading of the displayed information, shifting the starting point from the textual top-left corner to the visual centre.

The same approach is applied by mind mapping, often an on-the-fly activity, which encompasses an even larger amount of conceptual information in the same diagrammatic approach. Mind mapping can be seen as a never-ending network of connections, a sort of giant “visual thesaurus” of knowledge<sup>4</sup> (1), where each time we focus on a main concept and leave the secondary issues at the margin of our attention.

Visual metaphors represent a further step from distributing concepts in space: the “something” that we are discussing embodies into a conceptual illustration (the step we take in language every time we use the word “like”). Visual metaphors are in our culture more often confined to the emotional world of commercial persuasion, rather than to the world of academy and research: but they prove to be a powerful tool for the sharing of knowledge as well. A tool that Italian writer Italo Calvino - while listing the values to be saved for the next (now ours) millennium - calls *Visibility*. A value to be cherished for the sake of human creativity, together with *Lightness*, *Quickness*, *Exactitude*, *Multiplicity*, and *Consistency*<sup>5</sup>.

Visualizing allows the creation of a picture of the status quo, one or more shifts of the point of view - and therefore of the perspective on the whole picture - and eventually the envisioning of a future development.

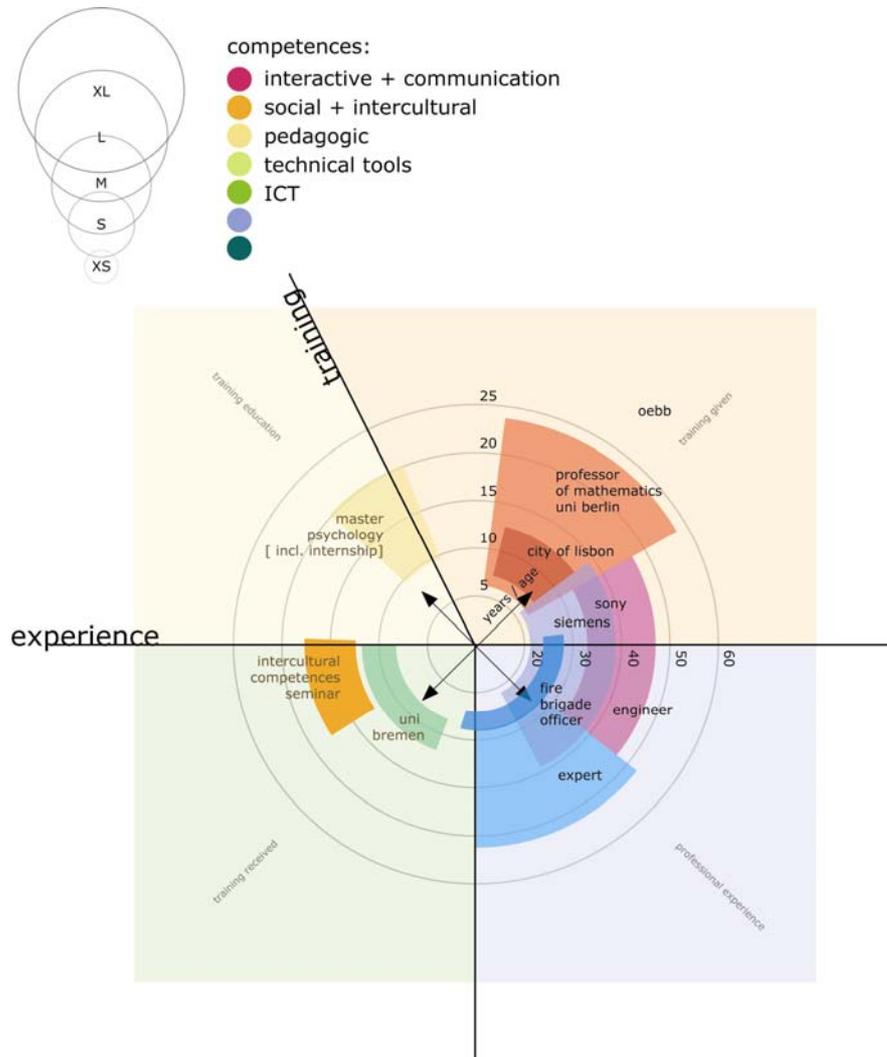
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4 [www.visualthesaurus.com](http://www.visualthesaurus.com)

5 “If I have included visibility in my list of values to be saved, it is to give warning of the danger we run in losing a basic human faculty: the power of bringing visions into focus with our eyes shut, of bringing forth forms and colours from the lines of black letters on a white page, and in fact of thinking in terms of images” Italo Calvino *Six memos for the next millennium*, Vintage International 1993

Several visuals have been tested throughout the project tt+:

### Visual 1: Depiction of competences and experiences of a trainer

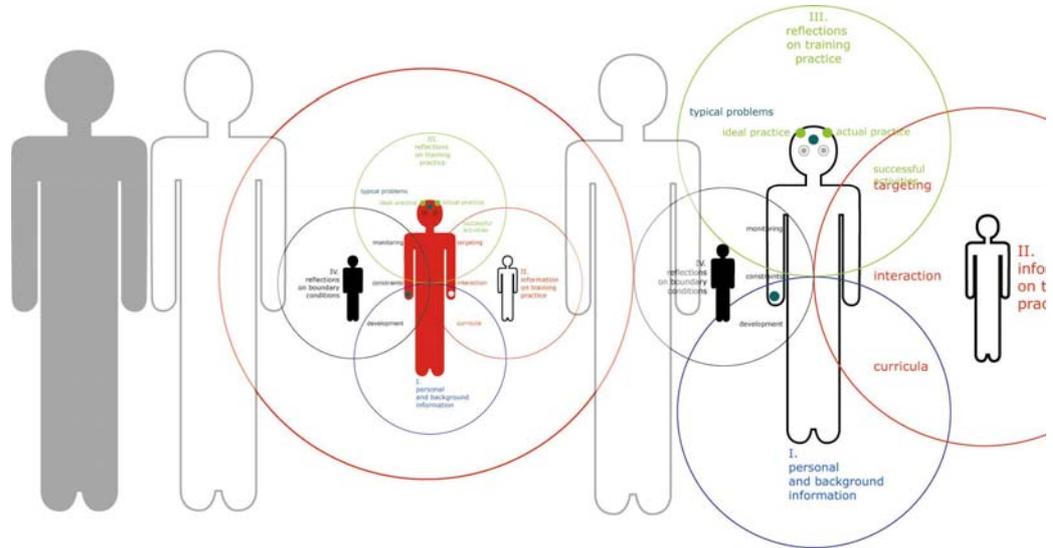


The visualizing process has started from the classical “quaternity” archetype that, combined with a sort of conceptual Cartesian plane, was applied to the individual experience of a trainer. Time expands from the centre in the four directions of received training vs. given training and training education vs. professional experience.



### Visual 3: Embeddedness of training provision within training stakeholders and cultures

A second approach is a “hierarchical” landscape of interacting actors and systems.

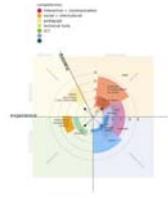


## **Visual 4 – From Company Training Practice to European Training Policy**

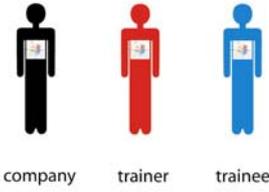
Five levels of actors and systems combining 1 + 2: from company training practice to European training policy, in a process of zooming out that encompasses visuals 1 and 2 in a

larger picture.

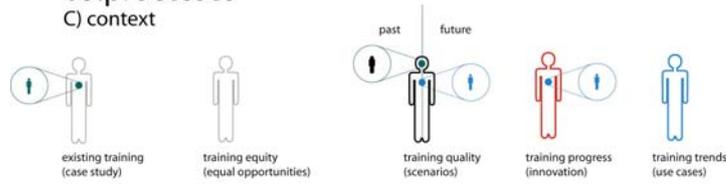
**01.personal portraits**  
A) career



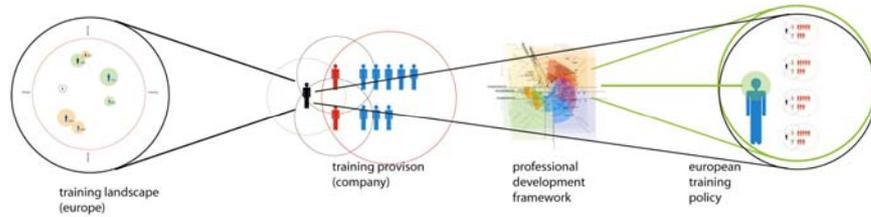
**02.stakeholders | actors**  
B) curriculum



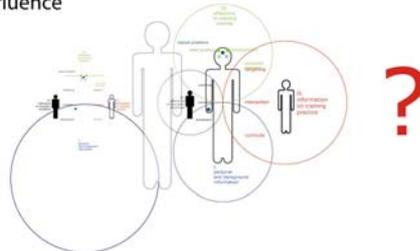
**03.processes**  
C) context



**04.systems**  
D) connectivity



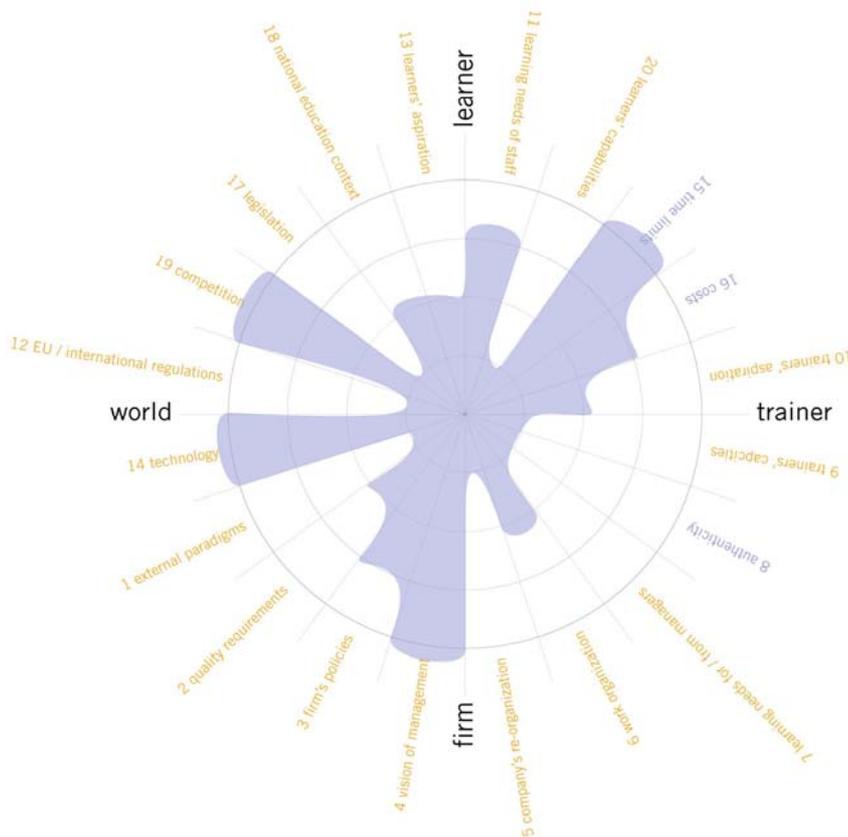
**05.synthesis (projection)**  
E) confluence



**Visual 5 - Driving Forces for Innovation in Training**

Here we can see a third and completely different approach that encompasses the principles of info-vis (information visualization). It is an abstract translation of the figures (values 0 to 3)

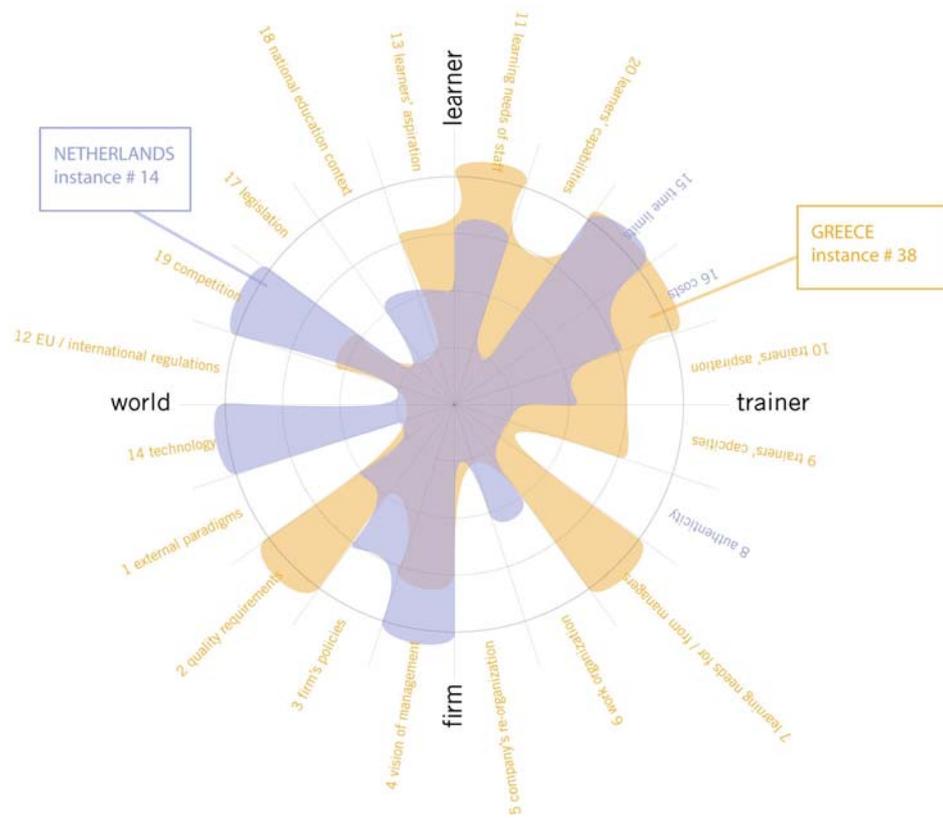
resulting from the driving forces questionnaire: a dynamically generated organic shape<sup>6</sup>. Distributing the 20 questions in a circular order according to 4 main “driving forces” (here exemplified by learner vs. firm, world vs. trainer) allows the dynamic generation of an organic shape that each time will automatically lean toward one or more forces.



## Visual 6 – Similarities and Differences between Countries

<sup>6</sup> See [www.visualcomplexity.com](http://www.visualcomplexity.com) - an inspiring archive about visualization of complex networks.

The “shape” of a specific country can therefore overlap that of another country – in this way highlighting common fields of practice and main differences.



## CHAPTER 10 - PERSPECTIVES FOR PROMOTING PROFESSIONAL DEVELOPMENT OF TRAINERS: TOWARDS A EUROPEAN SPACE FOR LEARNING AND INNOVATIONS

**Pekka Kämäräinen, Institut Technik und Bildung; Graham Attwell, Pontydysgu; Ineke Lam, IVLOS; Eduardo Figueira, Acadmus**

### 1. Introduction

In this chapter we examine the outcomes of the different studies undertaken by the TTPlus project and look at ways forward in supporting the professional development of trainers.

### 2. The diversity of trainers' profiles in Europe

In selecting organisations for the case studies undertaken by the project, there was no attempt to either choose nationally representative samples or to focus on any particular sector. Rather we were concerned to focus on a range of practice. Yet, on the basis of the case studies it is possible to identify different training contexts and professional profiles of trainers.

We can point to four main types of trainers characterised by different professional backgrounds, terms of employment, relations to trainees and by different opportunities for professional development:

- **Trainers in work organisations** may have an occupational background, are directly employed by the organisations to support the work-related learning of apprentices and staff members. Their prospects for professional development are linked to their occupational field and their practice training coordinators, designers and managers.
- Specialised **trainers within organisational development** may have a background in organisational studies or in management consultancy. They are employed as external service providers. They are used as mediators and coaches who support staff members in targeted Organisational Development processes or in the context of quality assurance.
- Specialised **trainers in ICT and new media**. They have a specific technological know-how or user expertise in ICT, new media and their role in working life. They are often employed as external service providers for organisations and / or as facilitators for staff members. Their prospects for professional development are related to the accumulation of ICT, media and training related experience (and to constant update of their know-how).
- **Independent trainers with different backgrounds** and with a specific interest in supporting learning processes. They are often employed as external service providers and by different client organisations to support the learning processes of

various learners. Their prospects for professional development are related to their ability to identify learners' potentials and ways to overcome learning barriers.

In some of the countries in which the case studies were undertaken, there was one dominant type of trainer; in others there were several types. This may be due to the organisations in which the case studies were undertaken. Equally, in some national languages the word 'trainer' refers to one of the main types whilst in other languages the word may be more inclusive.

It is also important to note that the project found an increasing number of people have some responsibility for training in the workplace. However, this might only form part of their job and very often they did not identify themselves as a trainer.

### **3. The redistribution of training functions**

One of the major findings from the empirical studies was that most organisations are making more use of external training services (even if they continue to develop their own training infrastructures). Equally, training in enterprises is based on a broad range of work-related, course-based and web-based learning arrangements. These findings have implications for the professional development of trainers.

In-company trainers and training managers are no longer exclusively in charge of training activities. Instead, they are increasingly involved in collaboration with other workers and professionals in developing training and learning.

Equally, trainers are no longer exclusively seen as people who organise training events and deliver training programmes. Instead, trainers are increasingly required to support, supervise and assess self-organised learning processes (either individual or group-based learning).

Trainers are increasingly using Information and Communication Technologies for training. Not only do trainers develop e-learning programmes but are using the internet to search for resources, for communication and for the development of shared online resources and for developing and supporting online communities of practice.

Trainers are also increasingly required to supervise practice- and experience based learning in new and changing learning contexts.

Equally, trainers are increasingly needed to validate, assess and certify prior experience based learning.

It is not possible from the case studies to say the extent to which these new roles have become mainstream in practice. But it is possible to identify a dynamic of change taking place in the work of trainers.

### **4. Towards an interest based approach to the development of trainers**

The analyses of the present training cultures in Europe bring into the picture different professional profiles. Trainers' professional profiles do not necessarily follow homogeneous national or sector specific patterns. Instead, European training cultures are characterised by co-existence of and cooperation between different profiles.

Opportunities for professional development for trainers vary even more.

One determinant is whether training is developed and delivered in-house or is delivered by external trainers. In the first case, the companies themselves may take responsibility for the quality of training and thus for the professional development of trainers. External training providers have responsibility of their own quality and for their own professional development. Training cultures vary considerably regarding the value placed on formal qualifications versus the appreciation given to training experience and practical know-how. In some countries, the issues of the 'training of trainers' and the 'professional development of trainers' were closely related to parallel developments in teacher education. In these contexts there was a concern as to how to establish a parity of esteem between teachers and trainers (in the light of different career models and qualification frameworks). In most countries the acquisition of formal qualifications by the trainers was not seen as the key instrument for promoting their professional development. Instead, the needs for professional development were seen in the management and facilitation of complex and customised learning processes including self-organised learning, group processes and web-supported learning.

Training contexts are dependent on several driving forces that have an influence on the strategic development of training. In some countries training in companies is being developed as a part of the public education and training system (e.g. the German dual system of apprenticeship).

However, the role of external training services is increasing as support for the traditional in-house model. In contrast, in many countries we see more incremental developments in training both regarding the role of public frameworks and the role of training markets. In such countries sector or regional factors had more importance on the actual development of training provisions.

The interests of trainers themselves regarding their own professional development vary considerably. In some cases, trainers emphasise the need to shape a career model that outlines progression steps from being a trainer to becoming a manager. In some cases, trainers emphasised the need to update and upgrade their subject specific technical and pedagogical know-how. In some cases trainers, expressed the need to integrate Technology Enhanced Learning in their training activities. In other cases, the main interests in professional development were related to the facilitation and support of self-organised learning processes.

*On the basis of the work of the TTplus project, it is not possible to propose a single mainstream competence or qualification model for professional development that could be implemented throughout Europe. However, it has been possible to identify different categories of 'trainers' and to identify strategic options for their professional development. New initiatives to support the development of trainers are often successful in as much as they meet specific needs and respond to the interests of the trainers they seek to reach. However, this is not enough. The opportunity for trainers to participate in such initiatives is dependent on the interests of their organisation and their client organisations. Therefore initiatives to support professional development need to address not only trainers, but also enterprises, professional organisations and social partners.*

## 5. Current policies at national and European level

### 5.1. The diversity of training policies in Europe

One of the main tasks of the TTplus project was to analyse the national or country specific policies that have an impact on the professional development of trainers. In this context it is worthwhile to note that the policy landscapes in the participating countries were very different and that the partners focused on different policy instruments in their analyses. For further European policy development it is worthwhile to consider the role of the following instruments:

- **Mandatory trainers' certificates that outline the minimum standards for trainers:**

The role of the mandatory certificates was discussed mainly with reference to the German and Portuguese cases. In both countries there is a debate on the renewal of such certificates (AEVO, CAP). The respondents in these countries emphasise the need for such basic qualification for trainers. Yet, it appears that in both countries the certificate and the related courses tend to consolidate traditional teaching and training patterns and give limited support for innovative developments in the training culture.

- **Qualification models that open vocational progression routes for trainers:**

In some countries there are policy initiatives to strengthen vocational progression routes to higher qualifications and to improve the status of trainers vis-a-vis teachers. In this context the German pilot projects for introducing intermediate qualifications for trainers (with work process oriented curricula) are being implemented as new system features. However, for the parity of esteem it is necessary to clarify the issue of higher (Degree level) qualifications.

- **Career models that link on-the job training to continuing professional development:**

In some countries the discussion on the professional development of training is closely linked to the recruitment and further training of teachers. In particular, in the UK and in the Netherlands the recruitment of vocational teachers has recently been linked to a short in-service training and to an institutional commitment to provide opportunities for continuing professional development.

- **Quality systems and quality registers as instruments for improving the transparency of training:**

In some countries the public authorities have tried to overcome the lack of transparency in training provision by introducing overarching quality systems. Training providers who want to be eligible for publicly funded training schemes have to implement quality assurance measures and sign into national quality registers. However, as was reported by some partners, these registers tend to portray as 'quality' the current training provisions and the formal qualifications of trainers.

## 5.2. *The role of European Qualification Frameworks*

The TTplus project also undertook to analyse the articulation between national and European policies (including the role of the European and National Qualification Frameworks).

One of the key priorities for the follow-up of the EU Lisbon Summit in 2000 was the improvement of the quality of teachers and trainers. The point of interest for the TTplus was to clarify in what way the parallel framework process for Higher Education systems (the Bologna process) and for Lifelong Learning policies (the Copenhagen process) would contribute to the professional status of teachers and trainers.

The analyses of the parallel processes (the Bologna process and the Copenhagen process) have led to the conclusion that the developmental agendas for teachers and trainers have been drifting apart.

Teacher education has been clearly linked to the Bologna process and to the development of the European Higher Education Area. In contrast, schemes for the training of trainers are positioned outside the Higher Education frameworks (although some programmes serve as access routes to Higher Education).

The Copenhagen process has not addressed the disparity of esteem between teachers and trainers or enhancing the recognition of trainers. Instead, the Copenhagen process has produced meta-frameworks for interpreting the current vocational qualifications in terms of 'learning outcomes' and 'reference levels'.

In addition, the Copenhagen process has been overshadowed by several conceptual difficulties (e.g. on the interpretation of 'competence-orientation'). One finding of the TTplus project has been the discovery of a zone of unsettled issues that have emerged in the debates on the EQF and will have an impact on the making of the national and sector qualification frameworks. In particular, the debates on the concept of 'competence' appear to be unsettled although this concept is critical for trans-cultural understanding and for common developmental approaches.

## 5.3. *Critical issues for policies for the Professional Development of Trainers*

The policy analyses undertaken by the TTplus project have drawn attention to a number of cross-cultural issues for policies for the professional development of trainers.

### **1. Training as a domain of its own or as an interface area**

In many cases current policies tend to treat training competences as a separate domain of expertise. However, the empirical studies demonstrate that training expertise is often linked to interfaces between subject specific knowledge, work process knowledge and pedagogic know-how in promoting context specific learning processes.

### **2. Training competences as exclusive know-how or as bridging expertise**

In many cases current policies tend to treat 'training competences' as the exclusive competences of established and recognised 'trainers'. However, the empirical studies demonstrate that training activities are often based on cooperation between trainers and other staff or by those for whom training is only a part of their job.

### **3. Certification for trainers as a minimum requirement or as a stage in continuing professional development**

In some cases current policies require formal qualifications or certificates as entry qualifications for appointment as a trainer. However, the empirical studies suggest both trainers and other workers are involved in training activities. Entry qualifications can marginalise the role or promoting training competence through continuing professional development.

### **4. Quality development through external control or through learning**

In some cases, policies have been introduced to require databases or registers for monitoring the training competences of organisations and trainers. The empirical studies have suggested other models for promoting the quality of training and work-related learning with the help of peer learning and knowledge sharing.

### **5. Recognition of trainers by external bodies or by the actors and organisations involved**

In many cases, policies tend to highlight the role of external authorities in recognising training expertise including qualifications and competences. The empirical studies suggest the need to take into account the context of training practice in providing learning, reflection and feedback for professional development.

## **6. The contribution of the TTplus project**

### *6.1. The Framework for the Continuing Professional Development of Trainers*

The TTplus project sought alternatives to qualification and competence frameworks in order to find a common ground for promoting professional development of trainers. Ultimately, we are seeking a wider European understanding of the work of trainers and training specialists through the development of a European space for learning and professional development.

We are also aware that different training cultures and policy contexts require a flexible and inclusive approach to the professional development of trainers. In this respect the key elements of the TTplus framework are as follows:

- A set of core principles that highlight common issues for in-company trainers, external service providers and other training specialists for the professional development of trainers. A set of basic commitments that link individual trainers, teams, employers and trade unions, intermediary agencies and government bodies to a common developmental agendas.
- A set of flexible implementation strategies that can be adapted by professional associations (community-based approach), by training providers and clients (market-oriented approach) or by public policy organisations (system-oriented approach).
- A set of common proposals concerning the accreditation and recognition of training competences that link the validation, assessment and recognition of trainers' experience-based learning and the development of competences to training and support for professional development.

### 6.2. Feedback from the consultation process

The feedback from the expert meetings or interviews organised by the TTplus partners about the development of a common approach to professional development for trainers through the Framework for Continuing Professional Development was largely positive. In particular the framework was seen as sufficiently flexible to meet the needs of trainer in different contexts and organisations. Equally the accreditation scheme could be adapted for different organisational and policy contexts.

However a number of issues arose. It was easier to approach the Framework as a starting point for possible initiatives by trainers' own associations and networks. It was more difficult to consider the proposals in relation to existing policy processes.

The proposed Framework does not demarcate between formal and non-formal learning opportunities as support for the professional development of trainers. This was perceived as helpful in training contexts in which there is lack of flexible pedagogic and professional support for trainers and for training specialists. It was more difficult to relate the Framework to existing curricula or schemes for professional development.

The Framework does not develop a specific approach to trainers' competences (either in terms of subject specific competence or in terms of cross-cutting competences). However, the expert meetings and interviews have suggested the development of 'competence families' or 'competence clusters' for the professional development of trainers.

## 7. An Action Plan for Developing the Framework for the Continuing Professional Development of Trainers

The TTplus framework has been shaped through a focus on the practice of training. This has allowed us to develop a series of commitments for trainers, teams, other stakeholders and organisations as well as exemplars of practice and an accreditation framework. There are a number of steps to take in further developing the Framework and in testing its use on practice.

**7.1 Research:** The research to date has been thorough and comprehensive and future work should concentrate on the design of the overall framework rather than its components. We now need a shift away from research to piloting and practice. However it may be valuable to investigate other accreditation frameworks – not necessarily in training or education - and incorporate that experience as additional 'good practice'.

**7.2 Infrastructure:** the TTPlus Accreditation Framework require further elaboration in more detail. This work needs to be undertaken at European Member State level including further consultation with policy makers, industry bodies and other intermediary organizations in addition to establishing levels of interest among the potential users. It should also determine possible funding sources or investigate the potential for self-financing.

**7.3 Principles and Standards:** these have been thoroughly addressed by the TTPlus project and have received widespread support in the external consultation. However, the results of the consultation suggest we should additionally look at developing broad competency clusters.

**7.4 Process details, mechanisms and documentation:** the TTPlus project has produced a skeleton proposal around this. Further development would probably be dependent on awarding bodies being in place. A significant piece of work in the future would be a programme for training the peer-mentors.

**7.5 Exemplars of evidence:** the TTPlus project has produced a useful and sufficient set of exemplar actions that can be added to in the future by others. However, at the moment, this is simply a list of possibilities. Further 'case study' examples of what 'rich evidence' might look or sound like would be very valuable. This has the added advantage that such materials could stand alone or be useful outside this framework.

**7.6 Tools:** the issue of tools was not addressed by the TTPlus project. However, the Framework needs to be supported by a tool set. In particular a 'Health Check' tool could be useful.

**7.7 People:** the TTplus project has used its expertise and resources to generate products which we hope will:

- a) Move the Framework forward.
- b) Be transferable across member states and sub culturally rather than sub culturally specific.
- c) Provide a bedrock for future national and transnational projects.

*We hope that the work we have undertaken will now be further developed by the European Commission, by the TTplus project partners and by others interested in the training and professional development of trainers.*

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- Balica, M: Country report from Romania.
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- Kämäräinen, P., Grollmann, P. & Martens, M.: Country report from Germany.
- Lübcke, E: Country report from the United Kingdom.
- Patiniotis, N: Country report from Greece.
- Rainha, L. & Figueira, E.: Country report from Portugal.

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### Vol 10: A Master in Intercultural Education for Europe and Latin America: Needs, Curriculum and Implementation [INTER-Alfa]

Adriana Ávila, Bernd Baumgartl, Victoria Espinosa, Patricia Mata, (ed.s) - INTER-Alfa project.  
 Series navreme|publications No. 10.  
 ISBN-10 9989-192-05-8, ISBN-13 978-9989-192-05-9. 220 p.  
 Xalapa (MX)/Vienna (AT)/Arica (CL)/Madrid (ES),  
**forthcoming April 2009.**

Articles and texts provided by professors and researchers involved in the MA design process, from Chile, Colombia, Ecuador, Mexico, as well as Austria, Ireland, Latvia, Spain, and the United Kingdom. As a product from the [INTER-Alfa Project](#) this book presents the experience of each institution/partner, and of the entire group, on the process to design the Euro-Latin-American Post-graduate programme on intercultural education. The overall aim is to make the effort and learning of the group available to other institutions which may be interested in the establishment of cooperation between universities, and in particular, in the field of intercultural education.



### Vol 8: Racism: What It Is and How to Deal with It [A Guide to Talking about Racism]

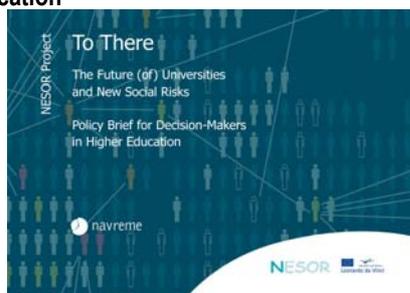
INTER Group - UNED/Universidad Complutense/CSIC.  
 Series navreme|publications No. 8, ISBN 9989-50-054-1.  
 166p. Madrid/Vienna, July 2007.

The bold existence of racism in European schools, as it was documented by the INTER Group (see volume 6 below), lays ground for teaching materials that help address questions in school-life. Whatever diversities exist in our schools, the only way to address the resulting difficulties is to learn to manage them. The next step of the INTER group therefore was this Guide on Anti-Racism for Teachers and Students.



**Vol 7d - To There:  
The Future (of) Universities and New Social Risks.  
Policy Brief for Decision-Makers in Higher Education**

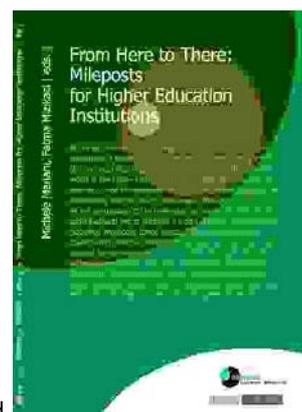
NESOR Project (ed.s)  
Series navremepublications No. 7d, 59p.  
ISBN-10: 9989-192-02-3,  
ISBN-13: 978-9989-192-02-2.  
Vienna/Modena/Barcelona,  
forthcoming February 2009.



As the fourth (!) volume of the trilogy, this policy brief lists recommendations for practice, directed towards decision-makers in higher education, at the level of HEIs, national authorities, and the European Commission. Its content derives from some 150 interviews with HE experts and University managers, 20 national reports and 4 transnational reports, 10 focus groups and national conferences, and 3 international conferences with internal and external speakers. Innovative visualisations enable a better understanding and suggestions derive from the research contained in the above 3 volumes, but above all from the (EU Socrates) [NESOR project](#) which aims to revise the reference model of Higher Education in Europe vis-à-vis the New Social Risks in today's Europe, which all university stakeholders have to face.

**Vol 7c - From Here to There:  
Relevant Experience from Higher Education Institutions**

Bernd Baumgartl, Michele Mariani (ed.s)  
Series navremepublications No. 7c, 250p.  
ISBN-10: 9989-192-02-2, ISBN-13: 978-9989-192-02-9.  
Ankara/Modena, forthcoming December 2008.



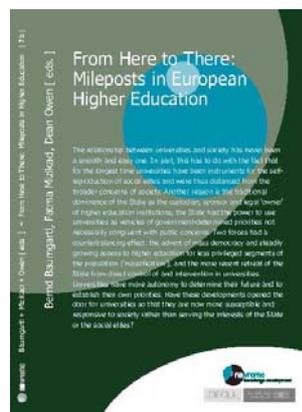
As the third volume of the HE trilogy, contributions here focus on institutions of Higher Education. Research findings stem from the (EU Socrates) [NESOR project](#) which aims to revise the reference model of the Lisbon Strategy – the knowledge based society and economy – and the emerging new social inequalities based on the disposability and the use of knowledge in this society. Articles look for the contribution of the universities to combat the new forms of social exclusion and to elaborate a model of higher education in the globalised knowledge based society. These project results are coupled with practical examples of assisting university reform and relevant hands-on experience by university managers. Questions addressed range from social risks, the European social model, or mechanisms against exclusion, to the necessity to deal with global citizenship, human rights or fundamental values - like those enshrined in the Magna Charta of the European Universities.

## Vol 7b - From Here to There: Mileposts of European Higher Education

Bernd Baumgartl, Fatma Mızıkacı, Dean Owen (ed.s)  
 Series navremelpublications No. 7b, 198p.  
 ISBN-10: 9989-50-049-5, ISBN-13: 978-9989-50-039-8.  
 Vienna/Ankara, April 2007.

The general trends in European Higher Education towards a devolution of state authority, combined with the decrease of funding for higher education, and the growth in higher education enrolment, all have put also public universities under strain to seek additional sources of income beyond the annual state allocation. University managers have started to think (a little) more entrepreneurial, but professors and students still find it almost indecent that the solemn nature of their alma mater is being debased by discussions about such mundane issues like money...

Contributions cover Public and Private HE, HEIs in the EU, Eastern Europe, South-East Europe, Turkey and Central Asia, as well as new trends concerning stakeholders relations, e-learning and accreditation of prior experience and learning - and self-evaluation...

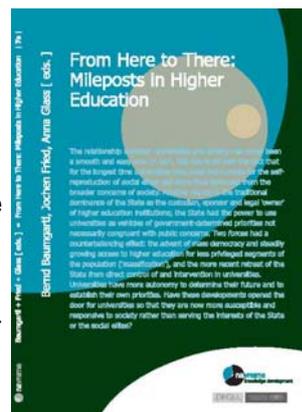


## Vol 7a - From Here to There: Mileposts in Higher Education

Bernd Baumgartl, Jochen Fried, Anna Glass (ed.s)  
 Series navremelpublications No. 7a, ISBN 9989-50-050-9.  
 112p. Vienna/Salzburg/Brussels, March 2007.

We tend to speak of *the* university. The idea has proven to be stronger than the effects of real diversification, and even in serious debates the questions what a real university has to be are not infrequent. And *its* future? It seems that the future has become either an extrapolation of the present into infinite space and time, or set of scenarios which reflect more of our fears and hopes than our options to change the world in order to keep it going. Indeed, has the university a future?

Contributions from all continents describe changes in governance, demography and research/teaching tasks, with remarkable differences between the continents.

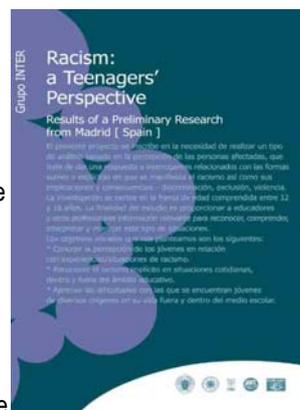


**Vol 6: Racism: A Teenagers' Perspective. Results of Research from Madrid**  
**[ El Racismo desde el punto de vista de los adolescentes. Resultados de un trabajo de investigación preliminar realizado en Madrid ]**

Grupo INTER - UNED/Universidad Complutense/CSIC.  
 Bilingual edition, with a prologue by Bernd Baumgartl.  
 Series navremelpublications No. 6, ISBN 9989-50-051-7. 252 p.  
 Madrid/Vienna, February 2007.

Given the rejection of race-based discourses by many Europeans, the findings of the present (bi-lingual) study by the INTER group are surprising, and shocking. The interviews carried out in schools in Madrid, Spain, are clear: Youngsters emphatically state that they

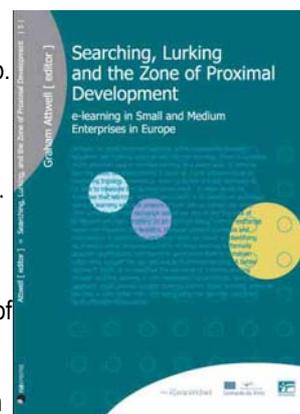
- 1) are exposed to and involved in acts of racism regularly,
- 2) understood the mechanisms of racist attitudes and behaviours, although they can not explain why racism is present in our society and they do not really know how to cope with racist situations, and
- 3) - most striking – they do not talk to adults about it, as students contend that adults make racial problems worse. The statements of Spanish students indicate that racism continues to be a European problem. Obviously, although biological human races do not exist, it is equally clear that large numbers of people still behave as if they do - a sufficient reason to analyse racism better.



**Vol 5: Searching, Lurking, and the Zone of Proximal Development**  
**[ e-learning in small and medium enterprises in Europe ]**

Graham Attwell (ed.) - ICT SME project.  
 Series navremelpublications No. 5, ISBN 9989-50-052-5. 184p.  
 Pontybridd/Bremen, March 2007.

Perhaps the most important question is the relationship between education and training systems and informal learning. There is currently much attention paid to informal learning at a policy level. As such the concern is to develop an exchange value to learning which at present is seen only as having use value. A better approach might be to recognise the use value of informal learning through profiling learning in non-constrained (e)-portfolios. Such an approach would provide a major move to learner driven learning where all learning is valid rather than only recognising that learning supported by qualification frameworks.

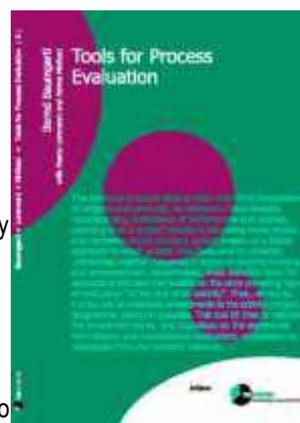




## Vol 2: Tools for Process Evaluation

Bernd Baumgartl with Marco Lorenzoni  
and Fatma Mızıkacı.  
Series navremepublications No. 2, 112 p.  
ISBN-10: 9989-50-039-8, ISBN-13: 978-9989500398.  
Vienna/Brussels/Ankara, December 2005.

Evaluation is becoming a standard tool when public money is spent, at least at EU level, and as a consequence, increasingly also in the EU Members States. The tendency in recent years is clear: from Final Evaluations of projects and products, we witness a move towards Accompanying Evaluations of performance and process. Learning from a project process is becoming more valued, and corrective action during a project is seen as a better approach to reach project objectives, and to underpin unintended positive outcomes in terms of capacity-building and empowerment. This tool kit tries to valorise the investment made, and capitalises on the experience from diverse and transnational evaluations undertaken by colleagues from the navreme network.



## Vol 1: Project Manager's Guide to Evaluation

Jenny Hughes and Bernd Baumgartl.  
Series navremepublications No. 1, 128 p.  
ISBN-10: 9989-50-053-3, ISBN-13: 978-9989500534.  
Vienna/Pontybridd, April 2005.

This book explains to all those involved in educational and developmental projects the meaning, objectives, advantages and impact of evaluation. We hope that this book makes a contribution to both your knowledge and skills as well as providing you with the confidence to make your own decisions based on your own needs and those of your project. In most projects, there is only a restricted budget for evaluation activities. This guide should help you to make informed choices about how to spend that budget for optimal learning output.

