Professional Competence in

Designing, Monitoring and Evaluation
of
Adult Learning Processes

Research Report

Project Partnership:

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Content

Summary

The competence profiles which are presented in this paper are a result of the European project "Designing, monitoring and evaluating adult learning classes – Supporting quality in adult learning" (DEMAL).

The DEMAL project set out to promote quality in the field of adult learning and education by working specifically on two professional key competences of adult educators and trainers:

- Design of Adult Learning, and
- Monitoring and Evaluation of Adult Learning.

Both competences are of crucial importance for enabling successful learning of adults, but have not been sufficiently addressed on a European level so far. Based on desk research and expert interviews, the DEMAL therefore project proposes for the first time detailed competence profiles which specify the tasks and activities linked to these two competences as well as the related professional knowledge, skills and competence in terms of autonomy and responsibility.

Adult learning stakeholders may use these profiles as a reference for developing standards, curricula, training courses or learning materials in their own national, regional or local context.

Two European training courses based on the profiles will be developed in a blended format within the DEMAL project itself, together with the related teaching and learning resources.

Part I. Introduction

The present report presents two competence profiles relating to two key competences of adult educators: *Design* and *Evaluation and Monitoring* of adult learning processes. Both profiles have been developed as an Intellectual Output of the Project "Designing, monitoring and evaluating adult learning classes – Supporting quality in adult learning" (DEMAL) that is co-funded by the Erasmus + Programme of the European Union and by the German Federal Ministry of Education and Research.

Part I will start by outlining the project rationale which refers both to the general European policy background as well as to the pedagogical relevance of the two key competences addressed in DEMAL: *Design* and *Evaluation and Monitoring*. These two key concepts will be explained and defined in greater detail in chapter 2. Chapter 3 will then present the aims, structure and practical relevance of the competence profiles themselves. For those readers with an interest in methodological aspects, chapter 4 describes the approach and procedures that have been adopted for developing the profiles. The profiles themselves are included in Part II of this report.

I.1 Policy background and project rationale

European concern for quality and professional development in adult learning

Quality in adult learning has been recognised as an important policy concern on the European level for many years. One of the four objectives of the strategic framework for European Cooperation in Education and Training (ET 2020)[1] is to improve quality and efficiency of education and training at all levels. One key pillar in this regard is the professional development of teachers and trainers and other staff working in education and training organizations.

This constitutes a particular challenge for the field of adult learning which is the most diverse sector of lifelong learning[2]. Unlike other education sectors, the field of adult learning and education is hardly regulated and staff typically have highly diverse educational and professional backgrounds. A few countries in Europe do have some type of national standards or curricula relating to the training of adult learning professional, but on the overall EU level, no joint curricula or qualification requirements for work in the field of adult learning exist. As a consequence, training supply for adult learning practitioners in Europe has developed unsystematically, is patchy and hardly comparable across (and often even within) countries.

The "Key Competences for Adult Learning Professionals" Framework

One important milestone in promoting standards and professional development of adult learning staff within the European area of lifelong learning has been the Framework "Key Competences for Adult Learning Professionals" that was published by Research voor Beleid (RvB) in 2010[3]. This framework first proposed a mapping of professional key competences that are relevant for the field of adult learning in Europe. It identified seven generic and twelve specific key competences which, as whole, attempt to cover all types of professional activity that is carried out within an adult learning provider organisation, including not only teaching but also management and other types of supporting activities (**Box 1**). Being of a generic character, the RvB framework provides a sound basis for further detailing competence standards and profiles with regard to *specific* institutional contexts, occupational roles or professional activities in the field of adult learning.

This is where the project DEMAL comes in. DEMAL focuses on two of the twelve specific competences that were identified in the RvB framework:

- Design of Adult Learning, and
- Monitoring and Evaluation of Adult Learning.

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[1] Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training ('ET 2020'), OJ C 119, 28.05.2009, http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:119:0002:0010:en:PDF

[2] European Commission (2015). Education and training 2010. Improving Policy and Provision for Adult Learning in Europe. Luxembourg: Publications Office of the European Union

[3] Research voor Beleid (2010). Key competences for adult learning professionals. Contribution to the development of a reference framework of key competences for adult learning professionals. Final report. Zoetermer. https://ec.europa.eu/epale/de/node/29706

The key role of Designing and Monitoring and Evaluation of Adult Learning

In all sectors of education, traditional teacher-centered pedagogical concepts of teaching and learning have been widely challenged in recent decades by modern constructivist, learner-centered and outcome-oriented approaches. A teacher is no longer seen as a person whose main task consists in transmitting knowledge to more or less passive students, but as a person who facilitates active learning processes in students with different needs by providing appropriate and diversified learning opportunities (Research voor Beleid & Plato 2008; Baumer et al. 2011). With this paradigm shift the demands made on teachers have become even more complex, and especially the competences of designing and of evaluating and monitoring learning processes have assumed a key role in enabling successful learning activities of adults:

> **Box 1: The Key Competence Framework for Adult Learning Professionals (Extract)**
>
> **Generic competences,** relevant for carrying out all activities in the adult learning sector
>
> - Being a fully autonomous lifelong learner (A1)
> - Being a communicator, team player and networker (A2)
> - being responsible for the further development of adult learning (A3)
> - Begin an expert in a field of study/practice (A4)
> - Begin able to deploy different learning methods, styles and techniques (A5)
> - Being a motivator (A6)
> - Dealing with heterogeneity and diversity in groups (A7)
>
> **Specific competences,** linked to the activity of adult learning professionals who are directly involved in the teaching/learning process
>
> - Being capable of assessment of adult learners' learning needs (B1)
> - ***Being capable of designing the learning process (B2)***
> - Being a facilitator of the learning process (B3)
> - ***Being an evaluator of the learning process (B4)***
> - Being an advisor / counsellor (B5)
> - Being a programme developer (B6)
>
> [In addition the Framework identifies six further *specific supportive competences* which are linked to tasks which are relevant for part of the professional roles in the adult learning sector, but which not directly related to the learning-teaching process, e.g. marketing, administration, ICT assistance etc.]
>
> adapted from: Research voor Beleid 2010

Competent **designing** and planning of learning processes is essential for ensuring that the learning provision matches the actual needs and capacities of the individual learners and that their learning develops its full potential. Designing is a complex task for all types of teachers, but in the field of adult learning with its very diverse settings and groups of learners it proves to be particularly complex. The parameters which teachers of adults need to take into account in making their pedagogical decisions (e.g. learning aims, size of learner groups, organizational setting etc.) are more variable and diversified than in any other educational sector. Adult educators therefore need a comprehensive set of knowledge as well as practical and reflective skills in order to make sure that their provision suits diverse needs and leads to the desired learning outcomes in the end.

Sound planning and design alone is however not enough to ensure that learning processes and outcomes are effective and of high quality. Teachers also need to continuously **monitor and evaluate** the learning process of their students. They need to be able to observe and analyse the teaching-learning process and to assess the achieved learning outcomes at various stages during this process. Only then will they be able to detect and effectively counteract upcoming problems

at an early stage and ensure the overall success of the learning activity. Again, this task of evaluation and monitoring becomes particularly complex in the field of adult learning, and it requires the teacher to adopt sufficiently diversified approaches to suit different learner audiences, subject areas and learning contexts, both formal and non-formal.

Designing as well as monitoring and evaluating learning processes are thus key components of an adult educator's professional activity and competence. Specific competence profiles and training provision relating to these particular two competences are however lacking on the European level so far. The DEMAL project has therefore set out to fill this gap by developing

- competence profiles
- training courses
- learning resources, and
- validation frameworks

relating to the professional tasks of designing, and monitoring and evaluating adult learning.

I. 2. Defining the Key Concepts: *Design – Evaluation and Monitoring*

The notions of *Design* and *Evaluation and Monitoring* have been chosen as titles for the DEMAL profiles to ensure consistency of terminology with the above mentioned Key Competences Framework by Research voor Beleid. Since these concepts are however associated with different meanings in the literature and in different contexts, it is necessary to explain in more detail what these terms cover in the present context. This chapter will therefore provide definitions and explanations of these concepts and their connection with other associated terms as they are understood within DEMAL.

Focus on the Micro level
In the literature, both *Design* and *Evaluation and Monitoring* are used at various level in the field of adult learning. They may refer to the micro level of learning and teaching in a specific setting, to the meso level of an adult learning provider institution and also to the macro level of adult learning policies and structures on a system level.

Figure 1). Within DEMAL the focus is on the micro level, i.e. the notions of *Design* and *Evaluation and Monitoring* refer to a particular course, seminar, study circle or another type of setting in which teachers and learners directly interact with each other.

Focus of DEMAL

Refers to:	Micro level	Meso level	Macro Level
regarding **Adult Learning in general**:	individual level (learning-teaching interaction within a specific learning setting for adults) - an individual course, seminar, study circle etc.	institutional level (adult learning provider organisation) - the complete course programme of a provider - management structures in a provider organisation	system level (adult learning structures and policies in a given territorial entity, a country or region) - the totality of adult learning providers; - adult learning policies
regarding **Design** in adult learning	- planning of a particular course, seminar etc. for adult learners;	- planning of a yearly course programme of an adult education provider	- planning of a policy programme, e.g. to promote literacy skills of adults
regarding **Monitoring / Evaluation** in adult learning	- monitoring learning progress of individuals in a given course; - assessing learning outcomes of participants in a given course	- monitoring organisational processes, e.g. for quality assurance; - evaluating the impact of	- measuring at regular intervals competence levels of the population

Figure 1: Design and Monitoring and Evaluation on different levels

Design

General Introduction

In a general sense, the verb "design" means to make a sketch or a drawing of something or, more abstractly, to plan, devise or construct something for a specific purpose[4]. The word relates to the Italian "disegno" (= drawing, plan, scheme), which in turn goes back to the Latin "designare" (= to sketch, to denote).

With regard to **adult learning**, design may specifically refer to:

- course planning: the planning of a given individual course, seminar, training etc. (micro level);
- programme planning: the planning of the total training offer of a given provider institution (meso level); or
- policy planning: the planning of a policy programme or policy framework for a given territorial entity (macro level).

Design on the micro level, which is the focus of DEMAL, will be explained in more detail below.

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[4] The Merriam-Webster dictionary lists for example the following meanings for "design": to create, fashion, execute, or construct according to plan; to conceive and plan out in the mind; to have as a purpose; to devise for a specific function or end; to draw the plans for; to make a drawing, pattern, or sketch of;" www.merriam-webster.com/dictionary/design

Design *in DEMAL*

On the micro level, *Design* **refers to the planning of a single particular learning offer,** e.g. a course. Normally, this planning activity will be **performed by the same person who will also be guiding this offer** as a teacher, trainer, facilitator etc. and who will be in direct interaction with the learners. This is a distinguishing feature from design on the meso (institutional) level, where a broader programme frame is set up by planning staff who will not necessarily be involved later on in the actual teaching activity.

In accordance with the definitions provided in the Key Competences Framework, **Box 2**), *Design* **needs to be based on the actual learning needs** of the prospective course participants. Therefore, learning needs analysis and collection of relevant information, on which the pedagogical decisions to be taken can be based, is considered to be an integral part of *Design.*

> **Box 2: *Design* in the Key Competences Framework (Extract)**
>
> "Competence in selecting appropriate learning styles and didactical methods for the adult learning process: being capable of designing the learning process"
>
> "This competence entails the ability to translate needs, demands, wishes and backgrounds of the adult learners into a learning process. This entails setting the objectives and selecting the method, style and technique (technology) to support the learning process" (p. 67)
>
> "The adult learning professional is able to use their own expertise and knowledge of relevant learning resources and the potentialities of the adult learners themselves to design the learning process. Furthermore, the adult learning professional is able to formulate and communicate the objectives of the learning process to give a larger picture of the learning process as a whole (e.g., learning programme, society, etc.), and is able to translate the objectives and learning into a time frame. The adult learning professional will also be able to assess the learners' progress and to make changes to the programme on an individual and the group level." (ibid., p 66)
>
> Source: Research voor Beleid (2010)

The **practical core task** related to *Design* consists in translating the identified learning needs and the appropriately selected didactical methods and activities into a coherent overall frame. In many cases, this overall frame will take the form of a **detailed training course plan** which outlines the learning aims, the content to be covered, and the learning-teaching activities to be implemented within the training.

Design is **not strictly limited to the traditional format of organised course provision in a group setting**, although in practice this is likely to be a major area of application. Besides that, *Design* may however also refer to the planning of other innovative or individualised learning arrangements, both for groups and individuals, including online based offers.

Although the main part of the *Design* activity will be done prior to the start of the actual course or learning offer, it will not stop at this point. During the implementation of the learning offer, teachers will need to regularly review their original plan and make adaptations when this is justified or required in the light of new insights or circumstances. In practice, this will normally be the rule rather than the exception. Potentially, therefore, *Design* continues to be **a task** for the teacher **for the whole duration of a learning offer**.

Related terms

What the DEMAL notion of *Design* covers is in the literature often referred to by expressions such as designing (or **planning**, or **creating**) **courses** or **classes** for adults (e.g. Spalding 2014, St. Clair 2015). Instead of courses or classes, also the terms **curriculum** or **syllabus** are used (e.g. Jääger/Irons 2006). Especially the term curriculum is however also often used with a very different meaning, where curriculum does not refer to a single training

> **Box 3: *Design* in DEMAL**
>
> Within DEMAL *Design* refers to the planning of an educational offer.
>
> **Key Features**
>
> - *Design* refers to the planning of a given single learning offer, e.g. a course;
> - *Design* is usually done by the teacher/trainer/facilitator himself;
> - *Design* is based on the needs of the learner(s) who participate in the offer;
> - *Design* may refer to a variety of formats, from the traditional organised course setting to other types of innovative or individualised learning arrangements, including online-based offers.
>
> **Related terms commonly used in the literature**: planning/creating courses/classes for adults; creating a syllabus, a curriculum; planning of learning settings/arrangements.

course but rather to training provision on a larger scale, especially in a formal prescriptive sense[5]. This latter meaning goes beyond the scope covered by the DEMAL understanding of *Design*. In DEMAL, *Design* only refers to the micro-level of the actual teaching/learning activity. It does *not* include the planning of the entire course programme of a training provider on the meso (institutional) level or the creation of curricular standards on the macro (system) level.

Evaluation and Monitoring

General Introduction

<u>a) Evaluation</u>

Unlike in the case of *Design*, a **great deal of theorizing** can be found on the topic of evaluation with definitions of the concept abounding in the academic literature of various disciplines. There is no generally accepted definition or consensus on what exactly belongs to evaluation and what not (cf Glass/Ellett 1980, 211 ss., see also Gutknecht-Gmeiner 2009, Wesseler 2011; Nuissl 2013 for overviews of the discussion). Drawing again on a general language dictionary, we can find, for example, the following definition for evaluation:

> *Evaluation* = the act of placing a value on the nature, character, or quality of something[6];

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[5] For example, "The European Adult Learning Glossary" which was developed in e European Commission project (Call Number EAC 11/2008) defines Curriculum as "The set of courses and their contents offered by an institution such as a school, college or university, and partially or entirely determined by an external body." (https://ec.europa.eu/epale/en/resource-centre/content/european-adult-learning-glossary-level-2)
[6] https://www.merriam-webster.com/thesaurus/evaluate.

The key aspect referred to by this definition – "placing a value on something" represents something like a minimal consensus which is somehow included in any of the

numerous definitions and conceptualisations available. It also plays an important role for the purpose of DEMAL but will need to be specified in more detail below.

Evaluation in the field of adult learning may be applied to a **broad range of objects**. These include in particular:

- a single course or learning offer as a whole; the learning process, progress and outcomes of individual learners; the professional performance of the teacher, trainer or facilitator (micro level)
- the total offerings of an adult learning provider; the management systems and structures implemented in a provider institution (meso level);
- the total adult learning offering in a given territorial entity (country, region, community); specific programmes and policies implemented by governments, administrators and policy makers to promote adult learning (macro level);

Evaluation may relate further relate to **various dimensions**, including structures, processes or outcomes. A widespread conceptualisation of educational evaluation is the so called CIPP model by Daniel L. Stufflebeam which distinguishes evaluation of *C*ontext, *I*nput, *P*rocess and *P*roducts) (Stufflebeam et al. 2003).

Another classical concept that is often referred to with regard to educational evaluation has been proposed by Donald Kirkpatrick (1997). His model focusses on the impact of educational measures. It distinguishes four levels which denote more immediate and more mid- and longterm types of impact:

- *Reaction* (the training participants' immediate feedback and satisfaction with the programme)
- *Learning* (the knowledge, skills etc. which participants have acquired during the training)
- *Behaviour* (the degree to which the participants have changed their behavior after the training, e.g. the degree to what they apply what they have learnt in their work)
- *Results* (longterm outcomes that can be attributed to the training, e.g. increase of productivity of the training participants)

Evaluation may serve **different purposes**, including in particular: *legitimisation* (e.g. of a particular programme by showing its quality and merits), *controlling* (e.g. from the perspective of funding bodies who want to know whether their money is well spent on a particular programme), *governance* (again for example from the perspective of funding bodies who want to know whether they should continue spending their money on a given programme or rather channel it in other directions), and *improvement* (e.g. through detecting weaknesses in a given programme and obtaining ideas on how to optimize the programme). An important distinction in this regard is often made between **Summative** and **Formative** Evaluation (Box *5*). A memorable picture to refer to his distinction has been coined by Robert Stake: "When the cook tastes the soup, that's formative: When the guests taste the soup, that's summative" (quoted by Giel 2013).

> **Box 5: Summative vs. Formative**
>
> **Summative Evaluation** is usually done after the end of an intervention. Its main function is to provide a conclusive picture and give a judgemental assessment of the quality or impact that has been achieved through this intervention.
>
> **Formative Evaluation** on the other hand, takes place during the course of the intervention itself, possibly also at various point. Its main function is to detect strengths and weaknesses of the intervention and to provide insights which enable the stakeholders to improve the intervention further.

Whatever the focus of a particular evaluation is, it will normally include the following **practical steps**:

- setting up the evaluation concept, defining the aims, criteria, methods and procedures of the evaluation;
- collection of information and data on the object under evaluation;
- analysis of the collected data according to specified criteria;
- making judgements on the quality of the object under evaluation and/or its achievements;
- drawing conclusions and formulating recommendations for the future;
- documenting and reporting of the evaluation findings to the audiences concerned (cf. Reischmann 2002)

The implementation of an evaluation activity involves different roles, including in particular: the one who is doing the evaluation (the evaluator), the ones who are subject to evaluation activities (e.g. learners in a programme, responsible organisers of a training programme, etc.), and the ones who have initiated or commissioned the evaluation (e.g. funding bodies). Depending on the concrete case, one single person may also assume more than one of these different roles, e.g. in the case when teachers engage in self-evaluation out of their own initiative. Whatever the specific setting, however, an evaluation is often a sensitive issue which may involve conflicting interests of different groups involved in the evaluation. Therefore the above listed practical steps need to be embedded in an overall communicative and participatory setting which balances and takes into account the perspectives of the various stakeholders as far as possible and meaningful.

The general language dictionary defines monitoring as

> *Monitoring* = paying continued close attention to something for a particular purpose[7].

In the educational literature the relationships between *Evaluation* on the one hand and *Monitoring* on the other hand are not always clearly distinguished and their rela-

> **Box 6: General Definition of Monitoring**
>
> **Monitoring** = paying continued close attention to something for a particular purpose
>
> Source: www.merriam-webster.com

tionship is defined differently by different authors (cf. Bohlinger et al. 2017). There are especially often **overlaps** between the concept of **monitoring** and the concept **formative evaluation**, since they both share the feature of being performed way through a particular intervention or programme, and since monitoring activities often follow a formative purpose.

In the field of (adult) education and learning, monitoring is often referred to in connection with educational reporting on the **macro level**. A typical example is the current European Strategic Framework Education & Training 2020 (ET 2020) [8]: Having been adopted in 2009 the ET 2020 strategy defines a number of benchmarks and aims to be reached until the year of 2020, including for example the aim to reach an average EU rate of 15% of adult participation in lifelong by 2020. The implementation of the strategic framework is accompanied by a continuous observation of the education systems in the EU which involves the collection and analysis of relevant statistical data. These data feed into reports – such as the annual "Education and Training Monitors"[9] as well as the joint progress reports by the Council and the Commission on the ET 2020 implementation[10]) - which show on a regular basis how well the EU is currently performing with regard to reaching the stipulated aims.

Monitoring as a practice of ongoing close observation can however also refer to the **micro level**. In this case it may in particular refer to the teacher's ongoing observation of the students' learning progress in a given course or seminar, especially in view of the learning outcomes that have been explicitly or implicitly defined for this course or seminar. This is the focus which is also adopted in DEMAL.

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[7] https://www.merriam-webster.com/thesaurus/monitor

[8] Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training ('ET 2020'), OJ C 119, 28.05.2009, http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:119:0002:0010:en:PDF

[9] https://ec.europa.eu/education/policy/strategic-framework/et-monitor_en

[10] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52015XG1215%2802%29

Evaluation and Monitoring in DEMAL focuses on the **micro level**, that is on the learning and teaching processes within a given course, seminar or similar setting. The **activities** which are of interest here are those **which the teachers (trainers, facilitators …) plan and perform themselves**, in interaction and cooperation with their learners.

> **Box 7: *Evaluation and Monitoring* in the Key Competences Framework (Extracts)**
>
> "Competence to continuously monitor and evaluate the adult learning process in order to improve it on an ongoing basis: being an evaluator of the learning process." (p. 71j)
>
> "The adult learning professional is competent in continuously monitoring the progress of the adult learners in the learning process and in evaluating the learning process itself, the learning strategy chosen, their own professional practice and the learning resources used. The professional is able to assess the learning outcomes and is able to formulate a well-balanced and grounded judgement of the progress of the adult learners and is able to create an atmosphere in which adult learners feel free to give their judgement or opinion on the learning process and the role the professional plays in this." (p. 71)
>
> Source: Research voor Beleid (2010)

Following up the definitions provided in the Key Competences Framework, Box 7), *Evaluation and Monitoring* refers to an activity which is performed by the teacher **on an ongoing basis** or at least repeatedly at various stages of the course. The **tasks** related to *Evaluation and Monitoring* include not only the planning and implementation of relevant measures and activities but also their follow-up: drawing conclusions from the findings and acting upon them as appropriate. *Evaluation and Monitoring* with all its different facets (competence assessment, learner guidance, self-reflection etc.) is therefore an ongoing task which stretches through all phases of a teaching/learning programme[11].

Evaluation and Monitoring in DEMAL may refer to **both results** (learning outcomes) **and processes** (learning/teaching process). It covers a broad range of different

> **Box 8: Evaluation and Monitoring in DEMAL**
>
> Within DEMAL *Evaluation and Monitoring* refers to a complex set of activities which a teacher implements in the context of an educational offer as an ongoing accompaniment to its instructional activity in the narrower sense. The shared aim of these activities is to ensure the success and improve the quality of the teaching and learning processes and outcomes.
>
> **Key Features:**
>
> - *Evaluation and Monitoring* activities are implemented at different stages of a course, virtually on an ongoing basis;
>
> - *Evaluation and Monitoring* activities may have both formative and summative purposes;
>
> - *Evaluation and Monitoring* activities may relate to outcomes as well as to processes;
>
> - *Evaluation and Monitoring* activities involve a strong component of learner guidance;
>
> - *Evaluation and Monitoring* activities also involve a strong component of self-reflection and continuing professional development of the teacher themselves:
>
> **Related terms commonly found in the literature**:
>
> Student assessment, learner assessment, learner guidance, counselling on learning, evaluation of learning outcomes; quality assurance

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[11] In the German discourse, the term "Begleitung" (accompaniment) is frequently used to refer to this concept, especially in expressions such as "Lern(prozess)begleitung" – learning (process) accompaniment (e.g. Büchel 2004, Bauer et al. 2006). This term reflects well the notion of an ongoing task for the teachers who "accompany" their students throughout the learning process, providing the appropriate support and guidance where necessary.

activities and interventions the purpose of which may be **both formative and summative**. *Evaluation and Monitoring* includes the assessment of learner competencies at various stages during the course (including also the assessment of students' entrance levels) as well as the evaluation of the quality of learning and teaching processes. *Evaluation and Monitoring* therefore not only refers to the learners, their satisfaction and learning achievements, but **also**, in the sense of **critical self-reflection** and self-evaluation, to the performance of the teachers themselves.

Evaluation and Monitoring, moreover, is not limited to a purely analytical exercise but involves a strong **interactive and communicative dimension** as well, since the related activities and outcomes often need to be negotiated and shared with the learners. Moreover, the implementation of *Evaluation and Monitoring* activities will often require the conscious and active participation of the learners. E*valuation and Monitoring* finally also includes a facet of **guidance and counselling**, when teachers have detected difficulties in the students' learning process and need to give advice on how to overcome these difficulties.

Related terms

In the English language literature there are hardly any synonyms which would cover exactly meaning of *Evaluation and Monitoring*, as it is adopted in DEMAL. However, components of this overall concept are referred to variously in the literature. Most often one will find the notion of **Assessment**, which in general means "the action or an instance of making a judgment about something"[12] and which has been defined for the field of education and training as "the process of appraising knowledge, know-how, skills and/or competences of an individual against predefined criteria (learning expectations)"[13]. Such assessment may take place at various stages. Often it will take place at the end of a course to determine in a summative perspective the learning outcomes of the students. It may however also take place at the beginning or even before the start of a course in order to determine the students' competence entrance levels so that a good match between students and learning offers can be ensured. Furthermore, assessment, can also involve a formative dimension. In this case the terms of **Assessment for learning**; **Continuous assessment**; or **Formative assessment** are also found[14]. Another important component of *Evaluation and Monitoring* is often referred to in the literature by the notions of **Learner Guidance, Counselling and Advice** as well as **Feedback** which focus specifically the formative dimension of *Evaluation and Monitoring*. Learner guidance, counselling and advice are however also used with reference to issues which fall beyond the scope of the DEMAL notion, for example the counselling of (potential) learners on choosing the appropriate course offer or qualification pathway (cf. Hooley 2014). The terms of **Appraisal, Grading, Marking** which refer to the act of making a judgement on a student's performance, are further related concepts found in the literature. These

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[12] https://www.merriam-webster.com/dictionary/assessment

[13] Cedefop (2013): Trainers in continuing VET: emerging competence profile. Luxembourg: Publications Office of the European Union

[14] European Adult Learning Glossary, Level 2. (https://ec.europa.eu/epale/en/resource-centre/content/european-adult-learning-glossary-level-2)

concepts are more closely linked to the summative dimension of *Evaluation and Monitoring*. Finally, the broad concepts of **Quality Assurance** and **Quality Development** have some overlaps with the DEMAL notion of *Evaluation and Monitoring*, at least as far as they relate to the micro-level (cf. Broek & Buiskool 2013). In actual fact, ensuring a (high) quality of learning and teaching can be considered as the ultimate

> **Box 9: Dimensions of Quality**
>
> - **"Equity** - equitable access to and participation in education and training
> - **Relevance** - provision must represent an effective route to and support, persistence in adult learning to the achievement of individual and societal goals
> - **Effectiveness** - means end relationships in terms of educational outcomes for learners. Completion rates and achievement levels are hard indicators of effectiveness
> - **Efficiency** - level and distribution of resources and the economical investment of resources to achieve specified aim under given condition: ratio of cost to benefits.
> - **Sustainability** - results of learning should be sustainable in the long term and should not harm the environment or society at large."
>
> Source: Broek/Buiskool 2013, p. 12

goal which *Evaluation and Monitoring* activities seek to achieve. The concept of quality has often been more associated with a management and managerial perspective on adult learning rather than with a pedagogical or professional development perspective, and, exactly for that reason, it has been variously criticised by educationists (cf. for example Egetenmeyer & Kaepplinger 2011). When quality is addressed as a goal in DEMAL; it does not refer to an exclusively economic understanding of the term. In line with the recent European study on "Quality in the Adult learning sector" (Broek/Buiskool 2013), the DEMAL understanding of quality embraces as well a "humanist/progressive perspective" with a "broader concern for the development of the learner, human development and/or social change" (ibid, p. 12) and which includes issues of equity, relevance and sustainability as well as of effectiveness and efficiency (ibid., Box 9).

Relationship between *Design* and *Evaluation and Monitoring*

Design on the one hand and *Evaluation and Monitoring* are addressed in DEMAL as two distinct fields of activity and related fields of competence, following the logic of the above mentioned Key Competences Framework (Research voor Beleid 2010). This distinction should however not conceal the fact that both fields are in practice interlinked in many ways, and quite of number of work tasks and related skills and competencies are related to both of them.

First of all, *Evaluation and Monitoring* are an integral part of a course and, as a consequence, *Design* as a planning activity has to cover evaluation and monitoring activities as well besides the planning of instructional activities in a narrower sense. On the other hand, the insights gained from *Evaluation and Monitoring* activities provide the necessary knowledge basis which should inform the course planning activities, both before and during the course. Figure 2 provides a schematic representation of how *Design* and *Evaluation* are linked at various stages of a course or a teaching-learning programme in general.

	Phase		
	before the course	**during the course**	**after the course**
Tasks relating to *Design*	**creating a course design**	reviewing the course design according to upcoming needs	creation of new designs for further courses
Mutual impact / Relationship	↓ *also involves the* ↓	↑ *informs the* ↑	↑ *brings about insights which will lead to* ↑	↑ *leads to enhanced professional experience which informs the* ↑
Tasks relating to *Evaluation/ Monitoring*	planning of assessment and evaluation activities	diagnosing entry levels of participants	**implementing evaluation/ monitoring activities**	using evaluation / monitoring results and experience for ongoing professional development

Figure 2: Relationship between Design and Evaluation of (adult) learning
Source: authors' own design

The separation of *Design* and *Evaluation* in two different competence profiles, while of course not being merely arbitrary, has therefore also somewhat artificial to it. One can reasonably argue that the main focus of activity of *Design* on the one hand and *Evaluation and Monitoring* on the other hand relates to different phases of a training programme. *Design* is largely but not exclusively - linked to the preparation phase which precedes the actual training, while *Evaluation and Monitoring* are mainly – but not exclusively - linked to the actual implementation phase of a training. In any case one should, however, not forget about the mutual relationships of both types of activities during all phases – before, during and after – of a training.

These close links between *Design* and *Evaluation and Monitoring* will also have some implications for the ways in which the DEMAL competence profiles can be used in practice. This issue ill be further explored in the final part of the following chapter.

I. 3. The DEMAL Competence Profiles – Aims and Structure

This chapter will explain the general aims and structure of the DEMAL competence profiles as well as outlining their practical relevance and potential usage. In doing so, also the key notion of competence as it is used in the DEMAL context will be defined and the different layers and elements of competence that are addressed in the profiles will be explained.

Aims of the Competence Profiles

The aim of the DEMAL competence profiles is to specify in detail

- the single **activities** and **steps** that are connected to the tasks of *Designing*, and *Evaluation and Monitoring*, as well as
- the **competencies** that are needed for successfully performing these two tasks in a professional way.

The profiles aim to give a **comprehensive analytical picture** of the competencies that are related to *Design*, and *Evaluation and Monitoring* while adopting a **broad understanding of** the term **competence** (see Box 10 for a full explanation). This means that the profiles include various types of competences and competence elements, ranging from very generic and transversal competencies to general pedagogical knowledge and to very specific practical skills.

At the same time the profiles aim to serve the **practical purpose** of providing a **reference tool** on a European level. In particular, these profiles may be taken as a reference for the **development of related training modules** or **portfolio instruments** for the validation of informally acquired competences – examples for both of these will be developed within the DEMAL project as well.

Box 10: Excursion: The concept of Competence in DEMAL

Competence as a term is used in many different ways and in the literature very different understandings of the concept can be found. This is not the place for a detailed discussion of the implications of the various understandings, but it is necessary to stress that the DEMAL project, following a widespread consensus, adopts a *complex* and *holistic* understanding of the term competence. In this understanding competence embraces all different kinds of individual prerequisites which are needed for successfully performing as a professional.

Drawing on a definition proposed by Weinert (2001, p. 27), competence as understood in DEMAL thus encompasses

> *"the cognitive skills and abilities which individual possess or which they can acquire in order to solve certain problems, as well the motivational, volitional and social dispositions and abilities which are needed for responsibly and successfully solving these problems in varying situations" (orig. in German, translation by the author)[1]*

This definition links fairly well to the understanding which was also adopted in the RvB Key Competence Framework where

> " (…) *competences should be understood as a complex combination of knowledge, skills and abilities/attitudes needed to carry out a specific activity, leading to results*" (Research voor Beleid 2010, p. 22)

An essential feature in this approach to competence is, that it is inextricably linked to performance. Competence not only includes certain resources (knowledge, skill, abilities, dispositions etc.) but also the ability to mobilise these resources in a concrete situation and eventually solve the related problems professionally in an appropriate way.

When the term "competence" is used in the DEMAL profiles, it normally refers to this broad understanding. There is however one exception, namely the final section in each profile which explains its link to the European Qualifications Framework (EQF). This part of the profiles explicitly refers to the specific EQF reading where competence is defined in terms of autonomy and responsibility (cf. Box 11).

_____

1 the German original reads: „die bei Individuen verfügbaren oder durch sie erlernbaren kognitiven Fähigkeiten und Fertigkeiten, um bestimmte Probleme zu lösen sowie die damit verbundenen motivationalen, volitionalen und sozialen Bereitschaften und Fähigkeiten, um die Problemlösungen in variablen Situationen erfolgreich und verantwortungsvoll nutzen zu können"

Structure of the Competence Profiles

The profiles start with a short **summary definition** which explains what is covered by the relevant key notions of *Design* and *Evaluation and Monitoring* of adult learning processes.

The core part of each profile then includes **four competence layers (A-D)** which are defined by their degree of *specificity* with regard to the two topics of *Design*, and *Evaluation and Monitoring*, respectively. These layers include in the first place generic pedagogical competence (A), followed by competence which is specific to the taught subject matter (B). The third layer is the most specific with regard to *Design* and *Evaluation and Monitoring* and includes the competences which are specifically related to these tasks (C). The fourth layer, finally, includes transversal competences which are also relevant prerequisites for successfully performing these tasks, but which at the same time hold an overarching significance that stretches beyond these tasks and also beyond the whole field of education and learning (Table 1).

Competence layers in the DEMAL profiles	
Layer	**Description**
Generic pedagogical competence (►A◄)	Comprises knowledge, skills and attitudes which constitute important prerequisites for the tasks of *Design* and *Evaluation and Monitoring*, but which are at the same time also general prerequisites for being a professional adult educator. *Example: basic knowledge of learning theories*
Subject specific competence (►B◄)	Comprises knowledge and skills which constitute important prerequisites for the task of *Design* and *Evaluation and Monitoring*, but which are intricately connected to the specific area of expertise of the adult educator and the subject matter being taught by him or her. *Example: content knowledge in one's own area of expertise*
Specific pedagogical competence (►C◄)	Comprises the specific knowledge and skills which are needed for performing the various steps and activities connected to the tasks of *Design* and *Evaluation and Monitoring*. The steps and activities themselves are also outlined in detail in this layer C. *Example: practical application of needs analysis techniques*
Transversal competencies (►D◄)	Comprises multifunctional and context-independent cognitive abilities, social skills as well as emotional qualities and attitudes that are highly relevant for the tasks of *Design* and *Evaluation and Monitoring*, but are at the same time useful in many different contexts, both private and professional, and can be used to achieve many different types of goals and objectives (cf. Weinert 2001, S. 52) *Example: observation skills*

Table 1: Competence layers covered by the DEMAL profiles

In the **concluding part** of the pro-
files, their **link with the European
Qualifications Framework** (EQF)
is explained. In this part, the pro-
files first describe *Design* and
Evaluation and Monitoring as pro-
fessional activities in terms of **re-
sponsibility** and **autonomy**,
thereby referring to the specific un-
derstanding of "competence" as it
is adopted in the EQF (Box 11). In
the second place, the profiles ex-
plain what **EQF level(s)** would be
most relevant for an imaginable
qualification in *Design* or *Evalua-
tion and Monitoring*.

All competence elements included
in the profiles are relevant for per-
forming the professional tasks of

> **Box 11: Knowledge, Skills and Competence in the EQF**
>
> '**knowledge**' means the outcome of the assimilation of in-
> formation through learning. Knowledge is the body of facts,
> principles, theories and practices that is related to a field of
> work or study. In the context of the European Qualifications
> Framework, knowledge is described as theoretical and/or
> factual;
>
> '**skills**' means the ability to apply knowledge and use know-
> how to complete tasks and solve problems. In the context
> of the European Qualifications Framework, skills are de-
> scribed as cognitive (involving the use of logical, intuitive
> and creative thinking) or practical (involving manual dexter-
> ity and the use of methods, materials, tools and instru-
> ments);
>
> '**competence**' means the proven ability to use knowledge,
> skills and personal, social and/or methodological abilities,
> in work or study situations and in professional and personal
> development. In the context of the European Qualifications
> Framework, competence is described in terms of responsi-
> bility and autonomy."
>
> Source: Official Journal 2008, p. 4
>
> The DEMAL profiles refer in general to the definitions of
> 'knowledge", 'skills' as they are adopted by the EQF.
>
> The particular EQF definition of 'competence' is referred to
> in a dedicated section in each profile, while in general a
> broader concept is adopted (cf. Box 10).

Designing, and *Evaluating and Monitoring*, but not all of them may be "teachable" or can be ac-
quired through structured training programmes to the same extent. When it comes to the practi-
cal purpose of designing training courses on the basis of the profiles, the different competence
elements will therefore need to be addressed differently, depending on the character and scope
of the envisaged course or instrument. This issue will be more explored in the following section.

Usage and practical relevance of the DEMAL competence profiles

One purpose of the competence profiles is that they may serve as a reference for the developing
practical tools and products such as curricula, training programmes or portfolio instruments. When
such product development is undertaken, it will however be necessary to keep in mind the differ-
ent structural characteristics of an analytical tool such as the profiles on the one hand, and a
practical tool, such as a training course, on the other hand. The following paragraphs will highlight
some points which need to be considered when the profiles are put to practical use.

Content scope of the DEMAL competence profiles

Being an analytical tool, the DEMAL competence profiles aim to give a complete description of
the activities as well as the required competencies which are relevant for *Design* and *Evaluation*
respectively. This means also that the competence profiles include elements which do belong to
Design and *Evaluation and Monitoring*, but which are not specific of these two fields, only. The

DEMAL competence profiles include also knowledge and skills which are part of an adult educator's professionalism in general (e.g. basic knowledge of learning theories) and which are not only needed for *Design/Evaluation* but more widely for competently performing as an adult educator overall.

This has implications for the design of training programmes on the basis of the profiles. Depending on the volume and duration of the envisaged training, developer will need to decide whether they want to focus on the more task specific competences, or to what degree they wish to include more generic competences as well. Also the context of the envisaged training programme needs to be considered: When the training is intended to be part of a more comprehensive programme, those more general elements may have been covered already in other training modules. If, on the other hand, a training on *Design* or *Evaluation* is designed as a stand-alone programme, developers will need to analyse first what kind and amount of previous knowledge regarding generic pedagogical competences they can assume to exist in their envisaged target groups and tailor their own offer accordingly.

Teachability of different elements in the DEMAL competence profiles

The DEMAL competence profiles include different types of elements which also have different degrees of "teachability". Some of them, in particular certain practical technical skills and knowledge, can be very well taught and learned within the frame of a training course, even one of shorter duration, while others are not or hardly teachable (e.g. elements which belong more to personal characteristics, such as empathy for example). Some of these elements may also be "teachable" to a certain extent but would normally require a longer period of supported competence development in order to reach a satisfactory degree (the term "teach" would actually be somewhat misleading in these cases). This applies especially to elements which require a certain amount of professional experience and practice (e.g. communication skills, feedback giving skills) and it applies certainly to all elements which imply a certain attitude or mindset (e.g. intercultural awareness). With regard to this latter type, a short-term training can provide certain stimuli and inputs for a subsequent competence development process, but if the aim is to develop these competences more deeply, then additional measures of continuing professional development will need to be implemented, for example extended internships, teacher induction phases, or mentoring schemes with senior colleagues accompanying and supporting the development of a novice teacher etc.

When the DEMAL competence profiles are used for developing a specific training format, the different qualities of the elements contained in the profiles need to be taken into account. The translation into a specific training format or professional development scheme requires a good judgement of what can be learned and taught by what means within a given time frame and in a given setting.

The DEMAL project proposes itself one example of such translation, since it will develop two blended-training courses for novice teachers on the basis of the profiles. These courses should

also be understood as an invitation to reflect on further possibilities how the DEMAL profiles can be used to design competence development support schemes - using other settings, adopting different temporal perspectives and addressing trainees with different degrees of experience.

Overlapping content

As mentioned in section I.2, the two fields of *Design* on the one hand and *Evaluation and Monitoring*, on the other hand, are to some degree overlapping. The DEMAL profiles have been conceived as self-contained elements which means that each profile covers the total content that is related to its particular topic *Design*, or *Evaluation and Monitoring*. As a consequence, the content of the two profiles is also overlapping to a certain extent. When the profiles are taken as a basis for developing two separate training programmes on these two topics, developers will therefore need to take conscious decisions regarding the distribution of the overlapping content between the two training programmes, in order to avoid unnecessary duplications.

Identification of EQF level

The DEMAL competence profiles also include information on relevant EQF levels for imaginable training programmes on *Design* and *Evaluation and Monitoring*. In practice, it will presumably be rare that a full qualification which can be linked to the EQF will be dedicated exclusively to one of these two topics. It is more likely, that the competencies of *Design* and *Evaluation and Monitoring* will be addressed as parts of more comprehensive qualification programmes, for example a teacher training programme or a study degree programme in (adult) education science. The DEMAL profiles therefore explain, in what comprehensive qualifications at what EQF level a specific training or study module on *Design* or on *Evaluation and Monitoring* could be meaningfully integrated. The criterion for determining the relevant EQF level(s) is in each case the level of the overall knowledge, skills and competence (in terms of autonomy and responsibility as understood in the EQF) which is required to perform the tasks of *Design* and *Evaluation and Monitoring* in a professional way.

I.4 The development process: sources and methodology

This chapter addresses readers with an interest in the methodology used for developing the competence profiles. It describes the general approach, the sources used and the various procedures that were adopted during the development.

Starting point: Key Competences Framework for Adult Learning Professionals

For developing the DEMAL competence profiles, the mentioned European Framework **Key Competences for Adult Learning Professional** (Research voor Beleid 2010) was taken as an important reference. Firstly, because this framework itself was based on a Europe wide desk research as well as experts consultations and can therefore claim to reflect a broad European consensus. Secondly, because the project's intention was to maintain and promote coherence on a European level and build on what had already been achieved. The aim of DEMAL was therefore not to invent completely new competence profiles but rather to validate the existing framework specifications with regard to *Design* and *Evaluation and Monitoring*, and to elaborate

> **Box 12: Data collection methods used for the development of the DEMAL profiles**
>
> **Literature review:** Relevant specialist literature including text books, theoretical papers and research papers was searched and screened for content regarding the two competences under examination. The main key words used for the literature search included: design, evaluation and monitoring, in combination with adults/adult learning/adult education/adult pedagogy; and competence in combination with adult educator/teacher/trainer. The main part of the search focused on literature in English or German language. In addition, DEMAL partners were also asked for the desktop research (see below) to indicate relevant literature in their respective national languages and provide English translation of relevant key content.
>
> **Desktop research**: All DEMAL partners performed a desktop research in their respective countries and provided relevant information in English according to a common reporting template (cf. Annex). This template included: a) an analytical summary on the state of professionalisation of adult learning staff in the country, b) information on existing relevant curricula, competences standards or qualifications frameworks; c) information on relevant documents such as policy papers or research reports; d) information on existing relevant training programmes for adult educators; e) information on existing relevant provision for validation of adult educators' competences; and f) information on relevant national or European projects.
>
> **Expert interviews**: DEMAL partners conducted a total of 21 interviews with adult education experts (5-6 interviews per country, cf. Annex for details of interview partners) according to a common interview guideline. Interviewees were asked to: a) describe in details and in their own words the single activities and tasks that are connected to *Design* and *Evaluation and Monitoring*; b) comment on the competence definitions proposed in the RvB Key Competences Framework; c) describe the competences that are necessary for performing *Design* and *Evaluation and Monitoring*; d) comment on the level of responsibility and autonomy in relation to the professional activities of *Design* and *Evaluation and Monitoring*, possibly also indicating the relevant qualification levels in the European or in the respective national qualifications frameworks. Interviews were conducted in the respective language of the country and taped. For the joint analysis, each partner provided for each interview an English translation of the key content to each section of the interview guideline.

them in much greater detail. To this end information was collected from a **variety of sources**, including in particular an extensive review of specialist literature, a desk research of relevant documents and practice examples (training programmes, competences standards etc.) in the partner countries, and a series of expert interviews that were conducted in the partner countries.

Data collection

The literature review and the desktop research produced a variety of sources which could be consulted for the development of the DEMAL profiles (cf *Box 12* for more details and annex B for full bibliographical details of relevant references). The overwhelming majority of these sources did not specifically focus on *Design* or *Evaluation and Monitoring* of adult learning processes as a main subject (one notable exception is for example Stanik 2016), but addressed these topics among others within a broader context.

Relevant information was particularly often found in literature which focuses adult educators' professional activities and competences in general (including a variety of introductory literature to adult teaching and learning and resource books for adult teachers and trainers (e.g. St. Clair 2015). Another important source that was collected through the desktop research were existing competence frameworks and for adult educators and adult teacher training curricula both on the national and European/international level. The development of the DEMAL profiles could thus build on a number of previous European projects (such as VINEPAC, FlexiPath, Qf2TEACH or DAVE) and also on a number of international/European competence profiles and curricula such as the European "Competence framework for VET professions" (Volmari et al. 2009) and the Curriculum globALE (Avramovska et al. 2013).

Among the national sources collected were various teacher training programmes, including university study programmes, official competence standards that have been formally decreed by government authorities for various groups of adult educators that, e.g. in Greece (Ministerial Decision 20082/23.10.2012), Romania (ANC, n.d.) and Spain (INCUAL 2011), but also competence profiles for adult educators that have been developed by practitioners and researchers in a more bottom-up approach, e.g. in Germany (Lencer & Strauch 2016), Austria (wba 2015) or Switzerland (SVEB, n.d.).

Besides the literature review and desk research, a total of 21 expert interviews were conducted in the partner countries (cf. *Box 12*). Experts included active trainers and teachers of adults for the main part, but also scholars and researches, management staff in training institutions or policymakers in order to cover a broad range of perspectives.

Data analysis

The data analysis was basically done in three steps (*Box 13*). In a **first step**, the collected literature and documents were screened for information relating to the topics of *Design* and *Evaluation and Monitoring*. This information was compared to the descriptions contained in the RvB Key Competences Framework in order to identify and collect potential additions and specifications to these descriptions.

In a **second step** the interview notes were analysed according to the main three categories "activities", "competence elements" and "EQF level relevance". In the category "**activity**" all statements of the interviewees regarding the question what specific tasks and steps are related to

Design and *Monitoring and Evaluation* were assembled and compared. Functionally equivalent statements across the interviews were identified and grouped together under a common title to denote one activity (e.g. "set up a course schedule"). In the end, it turned out that there was a high degree of agreement between all interviewees. The differences between the interviewees concerned more

> **Box 13: Data analysis steps**
>
> **Step 1: Literature screening**
>
> - Screening of literature and documents for statements on *Design* and *Evaluation and Monitoring*
> - Mapping literature against the RvB Descriptions, identifying additional specifications
>
> **Step 2: Interview Analysis**:
>
> - Identifying functionally equivalent statements on activities and competences, leading to a collection of a) activities and b) competence elements;
> - Grouping the identified activities/competences in a meaningful (logical or chronological) way to build draft competence profiles
>
> **Step 3: Revisiting Literature for validation**
>
> - Mapping draft competence profiles against the results of literature screening in step 1 and revisiting single documents;
> - Reviewing the draft competence profiles (minor amendments) on this basis.

the degree of detailedness with which the question regarding activities was answered, but the answers did not prove to be contradictory among themselves. The activities identified during the first analysis of the interview statements were then grouped in a way to form a structure that was coherent either from a chronological perspective (i.e. the order in which the activities are in practice performed in an idealtypical way - this was more the case with *Design*) or from a categorical point of view (in the case of activity types that are performed repeatedly rather than in a subsequent order - this was more the case with *Evaluation and Monitoring*). Finally, the interview notes were screened again in order to identify further specifications for the activities that had been identified in the described way (e.g. the activity "set up a course schedule" was further described amongst others by "defining a timetable for the whole course – from welcome/introduction through to wrap up/conclusion/farewell; breaking it down into units" etc.)

The analysis regarding the **competences** needed for *Design and Evaluation and Monitoring* followed an analogue procedure. Also in this case the agreement between the interviewees was rather high so that is was possible to eventually build a profile that was based on a wide consensus regarding its single elements. In this case the grouping of the identified competence elements regarded mainly the structuring in the four layers (Generic pedagogical competence, Subject specific competence, Specific pedagogical competence, Transversal competencies) that was eventually adopted. The interviewees had not been asked to discriminate between such categories but had only been asked in general what competences, including knowledge, skills and other elements, they considered necessary for the tasks of *Design* and *Evaluation and Monitoring*. It turned out that the answers focused to a considerable extent on more generic and transversal competences, actually more than it had been anticipated by the researches beforehand. This

finding had some impact on the structuring of the final competence profile: Originally, the authors had imagined to focus on those competences that were very specific of the two fields *Design* and *Evaluation and Monitoring*. In the light of the interviews, however, it seemed more sensible to enlarge the picture and point out also those more generic and transversal competence elements which may not become the subject of a training course dedicated to *Design* or *Evaluation and Monitoring*, but which are nevertheless so intricately connected to these tasks that they should be kept in mind, not only from an analytical but also from a practical perspective.

In the **third step**, the draft competence profiles were again checked against the results of the literature and document screening – some documents were also revisited for a second time – in order to further validate the drafts. This step led only to few minor amendments - adding another detail or reformulating a statement – but no substantial changes proved to be necessary.

The described development process was furthermore accompanied and supported through discussions and peer reviewing procedures within the DEMAL consortium leading to further refinements and eventually to the present **final version** of the competence profiles which are included in the following part II.

Part II The Competence Profiles

II.1 Competence Profile Design

Competence profile *Design*
Summary
Design refers to the task of planning a teaching-learning programme for adult learners. It refers to the micro-didactic level, which means the level of teachers or trainers who plan a specific teaching-learning offer which they will normally also be implementing and facilitating themselves. Contexts and settings of these teaching-learning-offers may vary and may include both formal and non-formal programmes, highly structured and more open formats, programmes for groups and individual learners etc. *Design* involves as a first step the collection of appropriate information and knowledge on which the necessary pedagogical decisions can be based. Secondly, it involves the planning process as such as a core part. And finally, it involves also the task to adapt the original planning throughout the implementation of the programme according to upcoming needs.
A) Generic pedagogical competence

Knowledge
 	
    - key concepts and principles regarding teaching and learning of adults, in particular
        - basics of learning theory;
        - basics of learning psychology;
        - learning barriers and motivations;
        - constructivist approach to teaching
        - concept of outcome orientation (versus input/curriculum orientation);
   - awareness/reflection of own professional role as a teacher of adults
   - basics of communication theory and techniques

- basics of group dynamics	
- knowledge of a sufficiently broad range of teaching methods	
Skills	
- practical application of a sufficiently broad range of teaching methods	
- facilitation skills	
Attitudes	
- professional awareness of one's own role and of the potential impact on one's own action on the learners; sense of responsibility and commitment to professional (ethical) values	

B) Subject matter specific competence
Knowledge
- content knowledge in one's own area of expertise
- pedagogical content knowledge relating to one's own area of expertise (e.g., "knowledge on what and how representations promote students' learning of subject matter key concepts" Goeze et al. 2014)
- subject-specific teaching instructional methodology
- familiarity with existing curricula, qualification standards etc. relating to the subject matter

C) Specific pedagogical competence relating to the design of adult learning processes	
C1) Tasks and activities to be performed	**C2) Related special knowledge and skills**
I. Collect and analyse background information (target group, learning needs, logistics)	**Knowledge**
a) Aims / needs of the client	understanding the concept
Task	- general knowledge and understanding of
- find out what are the aims, motivation, needs, expectations of the client; clarification of the training assignment	- the meaning of "designing" adult learning
Procedure / Steps	- role and importance of the designing process
- communicate with the client, request information; possibly conduct a needs analysis	- tasks involved in the designing processes / necessary steps

b) Aims / needs of learners

Task

 - find out what are the aims, motivation, interests, needs, expectations of the learners

Procedure / steps

 - communicate with the learners (before and also during the course)
 - observe learners during the course;
 - analyse other context information available

c) Resources of the learners

Task

 - find out about relevant characteristics of the learners (what is relevant will differ in each case), e.g.
   - professional background (occupation, years of experience …) ;
   - educational background (formal qualifications)
   - level of experiential knowledge and competences
   - personal background (age, family situation, cultural background)

Procedure / steps

 - collect/request information from the learners themselves, from the client or from other sources;
 - possibly apply tests or other assessment methods

d) Training environment, logistics

 - find out about logistical aspects: time frame for the training; space, location; equipment available; assess the possible impact of the aspects on the teaching/learning process

e) Relevant reference frameworks (e.g. curricula, competence standards, qualifications frameworks)

 - if applicable: find out what is specified in relevant curricula and/or competence standards with regard to the training (in terms of topics to be covered, learning outcomes to be achieved etc.) …)

II. Negotiate and set learning outcomes

Task:

 - transform aims of client/learners into learning outcomes to be achieved during the training
 - possibly with variations for different groups of learners

Procedure / steps

 - discuss, negotiate with the client and/or with the learners

 - various actors involved in the designing process, their roles and interactions

 - factors impacting on the designing process / factors to be considered during the designing process

needs analysis

 - theoretical concepts of learning needs, learning benefits, learning outcomes

 - different types of learning needs and benefits (concepts such as "wider benefits", ROI etc.)

 - reflection of types and role/impact of (hidden) interests which are connected to explicitly stated learning needs; reflection of the potentially differing interests and roles of clients and learners/participants

 - theoretical knowledge of needs analysis techniques, their potential and limitations

defining learning outcomes

 - basic knowledge of existing generic competence/qualification frameworks at national or international level:

 - types of learning outcomes (cognitive, social, affective etc.)

 - assessability of learning outcomes

assessment of entry levels / prior learning

 - different types of testing methods / methods for assessing prior learning

- define the (assessable) skills and competencies to be acquired
- specify indicators to identify if the learning outcomes have been reached;
- conclude agreements with the client and/or the learners (learning agreement, learning contract,
	<u>curriculum design and content reconstruction</u>
	
	  - general principles of pedagogical content reconstruction
	
	  - knowledge of curriculum design

III. Set up course concept / curriculum

a) Reconstruction of content

<u>Task</u>:

  - transform subject content/subject knowledge into learning content

<u>Procedure / steps</u>

(on the basis of the background information obtained and the learning outcomes which have been established)

  - select and (re)formulate content to be covered
  - identify links/cross-references between different parts
  - bring content into a logical-temporal structure so as to build a coherent learning path/sequence

b) set up course schedule

<u>Task</u>:

  - adapt learning content to a course format

<u>Procedure / steps</u>

  - set up a schedule/timetable for the whole course – from welcome/introduction through to wrap up/conclusion/farewell; breaking it down into units
  - identify function/aims and duration/time of each course unit
  - ensure that the whole course follows a certain logic and "arc of suspense" from beginning to end

IV. Fix course details (activities, methods, materials)

a) Plan for teaching

<u>Task</u>:

  - plan the learning / teaching activities in the course

<u>Procedure / steps</u>

  - define the activities to take place in each unit
  - select methods, media and social forms to be used in each case (consider in each case the potential and limitations of the respective method with regard to the unit's function, the need for variety, the time available etc.)
  - prepare for each unit a list of the material / equipment which is needed

Right column (continued):

<u>course design</u>

space and time

  - knowledge about the role of the learning environment, the role of space and time and its impact on the learning process

  - course phases and their functions (considered for courses of varying lengths, respectively)

teaching methods

  - theoretical knowledge of the different (types of) teaching methods, their potential and limitations

assessment

  - methods/media relate to these styles/types

  - different types and purposes of assessment

  - theoretical knowledge of the different (types of) assessment methods; suitable areas of application, potential and limitations of each methods

b) Plan for assessment

Task:

- plan how assessment of learning progress and outcomes is going to take place in the course

Procedure / steps

- identify function and purpose of the assessment (formative, summative; what kind of information shall be obtained through the assessment? who is going to use the outcome of the assessment in what way?)
- select appropriate methods, activities for the respective assessment(s)
- identify at what points/when during the course the respective assessment(s) shall take place

V. Prepare Materials

Task:

- prepare the materials needed for the various teaching, learning, assessment activities during the course

Procedure / steps

- formulate/prepare instructions to participants;
- prepare handouts, presentation slides; flipcharts; wallpapers etc.

VI. "Plan for flexibility"

Task:

- make sure (to a certain extent) that alternatives are at hand if (parts of) the original planning cannot be implemented for various reasons

Procedure / steps

- review course concept, anticipate potential reactions of the participants; identify potentially "difficult" points
- make sure the course concept allows for a certain flexibility (in terms of time and methodology)
- think of concrete alternative activities and methodologies for crucial parts of the course / Plan for alternative routes through the course in case the group reacts differently from what was expected
- build a "stock" of extra activities and methods which can be used spontaneously if need be.

VII. Communicate and review design

Task:

- make sure the essentials of the course (philosophy) are understood and accepted by the learners

factors impacting on learning

- theoretical knowledge of different learning styles and learner types;
- potential impact of age, cultural background and other factors on the learning of adults

relational knowledge

- ability to connect context factors (characteristics of the target group/participants, learning aims etc.) and pedagogical decisions (regarding learning/teaching content, methods, time, space etc.) taking into account relevant information

Skills

- practical application of needs analysis techniques
- practical application of testing methods
- operationalize learning outcomes
- ability to link methods and learning activities to the given aims and context of the training

Procedure / steps

- communicate the envisaged learning outcomes, course aims and the broad direction of the envisaged learning path with the learners;
- check if there is a need to review (parts) of the design as a result of the learners' response/feedback
- review design as needed[15].

D) Transversal competencies

- analytical and reflection skills
- problem-solving and negotiation skills
- communication skills
- observation skills, empathy
- creativity
- flexibility, open-mindedness

E) Competence in terms of autonomy and responsibility as outlined in the European Qualifications Framework

Professionals who are competent performers in the field of *Design* have a high degree of responsibility and self-management skills. They are able to autonomously collect the necessary information on which to base their work; they are able to autonomously draw appropriate conclusions from this information and take the relevant decisions. They are able to communicate, negotiate, and defend their decisions in direct interaction with various stakeholders (learners, client); they are able to autonomously reflect on their own professional role and action and critically review their own action and self-concepts; they will consciously seek and develop strategies for improving their own professional performance on the basis of the experience they have gathered and reflected.

The actual level of competence which a teacher or trainers possesses is closely linked to the amount of professional experience which he or she has accumulated as well as to the quality with which this experience has been consciously reflected by the teacher or trainer.

The activity of *Design* can be routinized only to a small extent. There are some general principles which can be 'learned' and applied during the process. It is also possible that the professional activity involves a certain degree of repetition and that new cases to be managed prove quite similar to earlier cases (e.g. when the type of course and target group remains the same over an extended period). This is however not necessarily the rule. In any case, the professional activity requires a high degree of case-sensitivity and the ability to consciously develop and adopt individual strategies for each case. Novice

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[15] Reviewing and fine tuning of the teaching/learning process in a training will be treated in greater detail in the area "monitoring and evaluation" of learning. This is indeed one field where both areas overlap to a certain extent.

teachers may draw on the advice of more experienced teacher in promoting their own professional development; but even novice teachers will often (have to) exert their professional activity with a high degree of autonomy and responsibility, even though they may still feel insecure in various occasions. With increasing experience professional they are likely to further increase both their self-confidence and their critical (self-) reflection and judgement ability. They will thus become able to exercise their professional task with increasing autonomy and authority themselves and act in turn as role models and guidance providers to other novice teachers.

Relevant EQF Levels

Based on the above outlined characteristics of this professional key competence and based on the EQF descriptors, the EQF qualification levels which have been identified as relevant for the task of *Designing adult learning process* range from **EQF levels 4 to 7** - depending on the depth of knowledge, skills and competence which are aimed at by the particular qualification. This means, a training on the topic *Design* can be meaningfully integrated in qualification programmes on any of these levels.

II.2 Competence Profile Evaluation

Competence profile *Evaluation and Monitoring*

Summary

Evaluation and Monitoring refers to a range of activities which are all ultimately aimed at ensuring the quality and continuous improvement of the teaching-learning processes of adults. It refers to the micro-didactic level, i.e. to the activities, which the teachers (and learners) plan and implement themselves in the context of a teaching-learning programme. *Evaluation and Monitoring* refers to both results and processes and thus includes both the assessment of learner competencies as well as an evaluation of the quality of learning and teaching process. *Evaluation and Monitoring* involves in the first step, the planning of suitable measures and activities. It involves furthermore the implementation of the activities and the analysis of the results. And if involves finally the task to draw conclusions from the results and take appropriate action where needed. *Evaluation and Monitoring* measures and activities vary widely and include amongst others observation and reflection of the teaching-learning process, use of competence assessment tools, collecting feedback from learners, as well as giving feedback and guidance to the learners.

Evaluation and Monitoring activities fulfil both formative and summative purposes. Basically, *Evaluation and Monitoring* activities in one form or another are an integral and ongoing part of a teaching-learning programme through all its stages. *Evaluation and Monitoring* even regards a longer term-perspective which stretches beyond a given teaching-learning programme, since its outcomes are also meant to contribute to a teacher's ongoing development as a professional.

A) Generic pedagogical competence

Knowledge

- basic theoretical knowledge relating to the foundations of (adult) learning and teaching, in particular.
  * learning theories
  * learning processes
  * different types of learning outcomes
- knowledge relating to the potential and limitations of different
  * learning resources
  * learning styles and strategies

- ∗   teaching approaches and methods

- concept of outcome orientation versus input orientation;

- awareness/reflection of own professional role as a teacher of adults

- constructivist approach to teaching

- knowledge of a sufficiently broad range of teaching methods

<u>Skills</u>

- practical application of a sufficiently broad range of teaching methods

- facilitation skills

<u>Attitudes</u>

- professional awareness of one's own role and of the potential impact on one's own action on the learners; sense of responsibility and commitment to professional (ethical) values

B) Subject matter specific competence

<u>Knowledge</u>

- content knowledge in one's own area of expertise

- pedagogical content knowledge relating to one's own area of expertise (e.g., "knowledge on what and how representations promote students' learning of subject matter key concepts" Goeze et al. 2014)

- subject-specific teaching instructional methodology

- familiarity with existing curricula, qualification standards etc. relating to the subject matter

C) Specific pedagogical competence relating to evaluation of adult learning processes

C1) Tasks and activities to be performed	C2) Related special knowledge and skills
I. Planning evaluation and assessment	**Knowledge**
a) set framework for evaluation/assesment	<u>understanding the concept</u> - basic theoretical knowledge of

Task

- establish what is to be assessed and evaluated and with what aim(*Note: this task has to be done in a first step* before *the course; however, it is crucial that also during the course the framework will be supplemented and modified according to the needs arising during the course, see next section*)

Procedure / Steps

- remembering the overall training context (characteristics of the target group/participants and of the client, training context – formal/non-formal/informal -)

- gather information about existing attitudes and possibly prejudices towards evaluation/assessment among the learners or other actors involved; consider potential influence of cultural factors;

- identify the learning goals and learning outcomes of the training (as a rule this will have already happened during the course design process)

- define the purpose(s) and function(s) which evaluation/assessment activities shall fulfil for the training in question (formative/summative; for certification purposes, for counselling purposes; individual or group assessment etc.)

- decide on the dimension which can/will be addressed by the evaluation assessment (e.g. appropriateness/effectiveness of learning resources used, of the learning strategies applied; of the teaching approach used; etc.)

- select suitable criteria and indicators which can be used for evaluation and assessment

- set up a written evaluation / assessment plan or overall framework which specifies for the training in question all relevant issues

b) prepare evaluation / assessment activities

Task

- practical planning and preparation of the concrete evaluation/assessment activities on the basis of the overall framework described above and in view of the aims and functions of the evaluation/assessment activities

Procedure / steps

- establish when during the training evaluation/assessment will take place

- select suitable evaluation/assessment methods

- select or prepare the tools for evaluation and assessment

- key terms and principles regarding evaluation, assessment, monitoring

- basic psychological knowledge

- different types and functions of evaluation and assessment (summative, formative)

- different types of criteria and indicators

- individual vs. group assessment

- characteristics of different tools for evaluation and assessment (e.g. tests, exercises, project work, reflective diaries etc.)

- basic principles of designing evaluation / assessment instruments (principles of questionnaire design, test design, ..)

relational knowledge

- knowledge about how different types, approaches, principles etc. of evaluation/assessment *relate* to different contexts, and target groups; ability to analyse and judge the appropriateness of a given approach/method etc for a specific context or area of application

methodological knowledge

- knowledge of various diagnostic methods and tools (test, self-assessment, portfolio, exercises, project work etc)

- observation principles and techniques

II. Using evaluation / assessment during the course (section II describes the use of evaluation/assessment in general; different concrete fields of application will be specified in greater details in the following sections)

a) Carrying out evaluation / assessment activities

Task

- apply evaluation/assessment during the course (on the basis of the previous planning but also according to ad-hoc requirements which arise during the course and which may lead to modifications of the previous planning)

Procedure / Steps

- implement the evaluation/assessment activities on the basis of the plan

- identify developments in the course which require or suggest spontaneous action in terms of evaluation/assessment and acting upon them accordingly (e.g. collect feedback from learners when problems occur during the course)

b) Using the evaluation / assessment results

Task

- analyse evaluation / assessment results and draw appropriate conclusions

Procedure / Steps

- identify key findings and messages from the evaluation/assessment

- analyse what action is suggested by these findings / messages and in what time frame (immediate action required or in the longer term?)

- assess the available options and possibilities for further action

- decide on further action to be taken and act accordingly

III. Using different types of evaluation / assessment

a) Diagose / assess competence levels

Task:

- diagnosing the competence level of the learners at various points in time (at course entry, mid-time through the course, at the end of the course)

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communication in the course

- basic theoretical knowledge of communication theory, group dynamics; roles in the group

- phases of a course and their characteristics

- knowledge/awareness of various professional roles as teacher, facilitator, counsellor

- feedback principles, methods and tools for collecting feedback

learner counselling

- principles of counselling learners

self-reflection professional development

- principles and techniques of self-reflection

- principles, methods and tools for professional self-development (e.g. reflective diaries, portfolios, peer feedback, supervision, …)

Skills

- designing an consistent evaluation/assessment framework for a given training

- designing evaluation and assessment tools and instruments for different purposes

Procedure / steps

- decide (in advance and/or spontaneously) when and how competence diagnostic shall take place

- select and apply suitable instruments to assess the competence levels

- analyse results, draw and implement conclusions for the further teaching process

b) Self-Reflection on own teaching performance

Task:

- reflecting systematically on own teaching performance and its impact on learners motivation and achievement

Procedure / steps

- decide (in advance and/or spontaneously) when and how self-reflection shall take place

- select and apply suitable ways/instruments for self-reflection

- analyse results, draw and implement conclusions for the further teaching process

c) Collecting feedback

Task:

- collecting and using feedback from various groups to improve the learning/teaching process

Procedure / steps

- decide (in advance and/or spontaneously) when, from whom and how feedback is to be collected and for what purposes, e.g.

  * feedback from learners in the middle or at the end of the course on their own learning experience, on the teacher's performance, on their satisfaction etc.

  * feedback from the client in the middle of at the end of the course on how they perceive learner achievement or teaching performance

- select and apply suitable methods/instruments for feedback collection

- analyse results, draw and implement conclusions for the further teaching process

- practical application of different tools for evaluation and assessment

- techniques for analysing evaluation and assessment results

- practical application of diagnostic tools including analysis of test results

- practical application of self-reflection exercises and tools

- techniques for recording and analysing self-reflection outcomes

- practical application of feedback collecting methods and tools

- techniques of analysing and structuring different types of feedback (oral/written; open/closed questions)

- application of observation techniques

- practical communication skills;

- application of feedback techniques

- practical use of tools such as portfolios, reflective diaries;

- designing a development plan for own professional development

d) Observation of learners and learning process

Task:

- observing continuously or regularly the learning processes during the course in order to detect possible problems at an early time and draw conclusions

Procedure / steps

- decide (in advance and/or spontaneously) on observation approach (e.g. continuously or at specific intervals?, criteria for observation) and methods (e.g. how to record observation results)
- apply observation during the course
- analyse results, draw and implement conclusions for the further teaching process

IV. Communicating and sharing evaluation and assessment

Task:

- put learners (and where appropriate also clients) in a position to appreciate the value of evaluation and assessment and benefit from the results

Procedure / steps

- reflect and decide on what communicative action is required at what point in time of the training

At the appropriate point(s) in time …

- communicate the rationale and purpose of evaluation and assessment activities creating a positive and constructive atmosphere
- clarify the roles and responsibilities of all those involved in the evaluation / assessment, making sure that learners take ownership of their own learning process and are not just passive recipients of the teachers' messages
- communicate the results of evaluation/assessment activities to those concerned in a fair and constructive manner / give feedback
- give advice learners about possibilities to enhance their own learning also with a view to promoting learners' reflection skills and reflection of their own learning process / learner counselling
- involve learners (and possibly clients) as far as possible and appropriate in the process of drawing conclusions form the evaluation/assessment and taking decisions regarding further action (e.g. implement a group discussion on how to deal with evaluation results)

V. Using evaluation and assessment for a continuous process of own professional development	
Task:	
- use (the results of) evaluation / assessment activities in a longer-term perspective to promote one's own development as a professional teacher/adult educator	
Procedure / steps	
- plan consciously for a systematic use of evaluation/assessment results for own professional development: what type of results is to be used, at what intervals, and how?	

D) Transversal competencies
- analytical and reflection skills
- intercultural awareness
- problem-solving and negotiation skills
- communication skills
- observation skills, empathy
- creativity
- flexibility, open-mindedness

E) Competence in terms of autonomy and responsibility as outlined in the European Qualifications Framework

Professionals who are competent performers in the field of *Evaluation and Monitoring* have a high degree of responsibility and self-management skills. They are able to autonomously collect the necessary information on which to base their work; they are able to autonomously draw appropriate conclusions from this information and take the relevant decisions. They are able to communicate, negotiate, and defend their decisions in direct interaction with various stakeholders (learners, client); they are able to autonomously reflect on their own professional role and action and critically review their own action and self-concepts; they will consciously seek and develop strategies for improving their own professional performance on the basis of the experience they have gathered and reflected.

The activity of *Evaluation* can be routinized only to a small extent. In some cases, especially in the case of formal education, certain elements of this activity may have already been established by external stakeholder, e.g. in the case of standardized examinations at the end of a course. In most cases however, adult educators can autonomously plan for the evaluation activities which they intend to implement during a training. In doing so, adult educators can draw on existing tools and models, but they will in any case need to make well-founded decision regarding the appropriateness of existing tools for a given

purpose, taking into account a wide range of parameters. Moreover, much of the *Evaluation* activity cannot be planned in advance, but needs to be put in action during an ongoing teaching-learning process. The adult educator has to take instantaneous decisions, based on a quick analysis of the situation, and has to come up with creative solutions to address individual challenges which arise during the process.

The high proportion of action which cannot be planned in advance makes this task of *Evaluation* a particularly demanding one. A high level of competence in this field therefore requires not only the accumulation of relevant knowledge and technical skills in designing and applying relevant evaluation and monitoring tools. It also essentially requires the ability to make complex decisions in a very short time. This ability is closely linked to the level of professional experience which has already been accumulated by the adult educator.

Relevant EQF Levels

Based on the above outlined characteristics of this professional key competence and based on the EQF descriptors, the EQF qualification levels which have been identified as relevant for the task of *Evaluation and Monitoring of adult learning processes* range from **EQF levels 4 to 7** - depending on the depth of knowledge, skills and competence which are aimed at by the particular qualification. This means, a training on the topic *Evaluation and Monitoring* can be meaningfully integrated in qualification programmes on any of these levels.

Annexes

Annex a) List of abbreviations

RvB = Research voor Beleid

DAVE = Project "Developing validation of adult education trainers"

EQF = European Qualifications Framework

wba = Weiterbildungsakademie (Austrian Academy for Continuing Education)

AdA = Ausbildung der Ausbilder (Swiss Train-the-Trainer System)

VINEPAC = Project „Validation of informal and non-formal psycho-pedagogical competencies of adult educators"

QF2TEACH = Project "Qualified to Teach"

FlexiPath = Project "Flexible professionalisation pathways for adult educator between the 6th and 7th level of EQF"

globALE = global Curriculum for Adult Learning and Education

Country abbreviations

CH = Switzerland

DE = Germany

ES = Spain

GR = Greece

HU = Hungary

RO = Romania

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Annex c) DEMAL Interviews

c1) Interview guideline

Project DEMAL – Interview Guideline

2. November 2016

Susanne Lattke, DIE

General Information on Interviews

The DEMAL project foresees interviews with adult learning stakeholders in all partner countries.

Aim of these interviews is to help identify and analyse the two key competences, proposed by the Framework "Key Competences for Adult Learning Professionals" (Research voor Beleid, 2010):

- B2: Being capable of designing the learning process
- B4: Being an evaluator of the learning process

in terms of *activities* and required *learning outcomes*.

The analysis of the interviews shall feed into the development of a competence framework for these two key competences which will be linked to the European Qualifications Framework.

Rules for Interviews and Reporting

General rules for the interviews and reporting are outlined in the box below.

> **Rules for Interviews and Reporting**
>
> **a) Interviews**:
>
> Interviewees
>
> Five interviews with stakeholders in adult learning in each country will be conducted.

Such stakeholders may include adult learning professionals but also policy makers and researchers/scholars with a clear connection to adult learning

The interviewees should cover (i.e. have expertise regarding to) different fields and contexts of adult learning: e.g.:

- formal adult education, non-formal or informal adult learning;
- vocational and non-vocational adult learning;
- adult literacy, active citizenship, cultural education; skills training, HRD, …
- adult learning in companies, universities, community centres etc.

Language:

Interviews may be conducted in English or in language of the country (but reports need to be provided in English, see below).

Taping:

Interviews should be taped, but only for verification purposes.

b) Reporting

Full interview transcripts are not a necessary requirement, it is however recommended to transcribe at least key passages of the interviews, i.e. those containing interviewee's input regarding activities and competences of the adult learning staff.

Requirements for the report/summary to be provided for analysis to the DIE:

- the report needs to be in English;
- make sure to provide relevant input for any question of the interview template;
- make sure that no relevant piece of information provided by the interviewee is omitted in your report;
- regarding the key content of the interview (interviewees' comments on professional activities and competences of the adult learning staff) stick as much as possible to the original wording (in English translation) used by the interviewee;
- small talk passages, elements like laughter, coughing, pauses etc. need not be noted down; emphases etc. made by the interviewee should be noted down only if they are important for the meaning of what has been said;
- If the translation of key terms into English is difficult or if you think it may lend itself to misconceptions, add a comment to explain more fully the meaning of the word/phrase that was used in the original interview language;

Timeframe: Send interview reports to the DIE by **20 December 2016**.

Interview Guide

A) Interview Information (to be pre-filled in by interviewer)

Date and time of interview:	
Country/Place of interview:	
Name of interviewer:	
Name of interviewee:	

B) Introduction

Interviewers introduce themselves and explain background and context of interview:

- general information on project DEMAL
- purpose of interview
- duration of interview (45-60 Minutes)
- ask permission for taping the interview (please ask again after taping has started so that the interviewee's consent is recorded as well)
- interview will be treated confidentially (i.e.: names and functions of all interviewees will be listed in the project reports, but single statements/quotes will not be recognizably attributed in the project publications)

C) Information on Interviewee

Q C1: Please describe shortly your professional role and the organisation(s) you are working for.

prompt

- job title:
- job status: e.g. freelance, fix term employment, …)
- range of professional activities: e.g. teaching, managing, counselling, …
- type of organisation(s): e.g. profit/non-profit, government organisation; authorities; training company; schools, community centres etc.
- work area of organisation(s): e.g. vocational training; liberal adult education; HRD; language teaching; …, education policy; etc.;

Q C2: How would you describe your relation to teaching activities

prompt

- e.g. major part of my current job (active teacher);
- e.g. major part of previous jobs (substantial experience as a teacher even if teaching is not a major part of the current job)
- e.g. theoretical study of (adult?) pedagogy/andragogy)
  e.g. works regularly, e.g. in a management or coordinating position, with active teachers
- etc.

D) Context: Key Competences for Adult Learning Staff

Refer to the Framework "Key Competences for Adult Learning staff" (Research voor Beleid, 2010)

- *is interviewee familiar with this Framework?*

- *if not, explain shortly background/content of this Framework (for this you may refer to the info box below):*

- *Explain DEMAL specific aim to further detail this framework with regard to two specific competences identified in this framework*
    - Being capable of designing the learning process
    - Being an evaluator of the learning process

- *Provide clarification as needed regarding the term "design":*
    - "design" may refer to different levels: designing individual classes/lessons for adult learning courses (micro level) or designing complete programmes/curricula for adults (meso level).
    - within DEMAL, the focus is particularly on the micro level, i.e. "design" refers to single classes and lessons rather than whole adult learning programmes.

Info Box: Key Competences for Adult Learning Staff (RvB 2010)

RvB 2010 identified seven generic and six specific key competences which adult learning staff directly involved in the learning process should possess:

Generic competences:

- Being a fully autonomous lifelong learner (A1)
- Being a communicator, team player and networker (A2)
- being responsible for the further development of adult learning (A3)
- Begin an expert in a field of study/practice (A4)
- Begin able to deploy different learning methods, styles and techniques (A5)
- Being a motivator (A6)
- Dealing with heterogeneity and diversity in groups (A7)

Specific competences for staff directly involved in the learning process:

- Being capable of assessment of adult learners' learning needs (B1)
- **Being capable of designing the learning process (B2)**
- Being a facilitator of the learning process (B3)
- **Being an evaluator of the learning process (B4)**
- Being an advisor / counsellor (B5)
- Being a programme developer (B6)

[In addition RvB identified six further specific *supportive competences* (regarding tasks not directly related to the learning process, such as marketing, administration, ICT assistance etc.)]

Q D1: How important do you consider the two competences in the focus of DEMAL (B2, B4) for adult learning teachers?

Q D2: What role do these competences play in your own professional work?

prompt:

- how much *time* of your work do you spend on activities related to the design or evaluation/monitoring of adult learning processes?

- how intensively do you (or did you in the past) actively practise related activities?

- how intensively do you (or did you in the past) engage with *theoretical reflection* on these activities?

E) Key Competence B2 "Design of the learning process"

*Q E1: Looking at the task of "**designing** the learning process": What **activities and (sub)tasks** belong to this task according your experience?*

Q E1 a) Please describe as detailed as possible, using your own words.

prompt (from RvB 2010)

Info Box

RvB has identified the following key elements relating to "design of the learning process"

"This competence entails the ability to translate needs, demands, wishes and backgrounds of the adult learners into a learning process"

relevant Steps:

- identifying learning needs
- formulating learning objectives
- selecting method, style, technique (technology) to support the learning process.

Q E1 b): Do you agree/disagree with this definition? What would you add?

*Q E2: What **competencies** (knowledge, skills, personal qualities etc.) are needed for carrying out in a competent way the task of "designing the learning process"? Please think about it for a moment and describe as detailed as possible*

*Q E2 a): What **knowledge** is needed to carry out the tasks which you have just described?*

*Q E2 b): What **abilities** are needed to carry out the tasks which you have just described?*

prompt:

- transversal skills
- specific skills
- personal qualities
- attitudes, values

*Q E2 c): If you think of a person who is carrying out the tasks which you have just described: to what degree must this person be able to **work autonomously** and take over **responsibility**? Please comment?*

prompt:

- e.g.: must he/she necessarily be able to work without supervision from others (senior colleagues, managers)? To what degree?
- or the other way round: must he/she himself/herself have leadership qualities? (e.g. supervise other persons?)

F) Key Competence "Being an evaluator of the learning process"

*Q F1: Looking at the task of "**monitoring and evaluating** the learning process": What **activities and (sub)tasks** belong to this task according your experience?*

Q F1 a) Please describe as detailed as possible, using your own words.

prompt (from RvB)

Info Box

RvB has identified the following key elements relating to "evaluating the learning process"

 "The adult learning professional is competent in continuously monitoring and evaluating the adult learning process in order to improve it on an ongoing basis:"

Relevant steps/subtasks:

- establishing the learning goals and objectives for the course;
- measuring whether the goals have been met;
- continuously monitoring the progress of the adult learners in the learning process

    * evaluating the learning strategy chosen

    * evaluating their own professional practice

    * evaluating the learning resources used.

- giving feedback to the adult learners on learning outcomes and progress made; and
- using the results to improve teaching and learning in the course.

Q F1 b): Do you agree/disagree with this definition? What would you add?

*Q F2: What **competencies** (knowledge, skills, personal qualities etc.) are needed for carrying out in a competent way the task of "evaluating and monitoring the learning process"? Please think about it for a moment and describe as detailed as possible.*

*Q F2 a): What **knowledge** is needed to carry out the tasks which you have just described?*

*Q F2 b): What **abilities** are needed to carry out the tasks which you have just described?*

prompt:

- transversal skills
- specific skills
- personal qualities
- attitudes, values

*Q F2 c): If you think of a person who is carrying out the tasks which you have just described: to what degree must this person be able to **work autonomously** and take over **responsibility**? Please comment?*

prompt:

- e.g.: must he/she necessarily be able to work without supervision from others (senior colleagues, managers)? To what degree?
- or the other way round: must he/she himself/herself have leadership qualities? (e.g. supervise other persons?)

*Q G1): Please think of a **training programme** that develop the competencies needed for these two areas ("design of the learning process" / "monitoring/evaluation of the learning process").*

*To **what level of the EQF** would you assign the **competencies** developed by such a programme? Please have a look at the EQF descriptors and comment which level description fits best in your opinion?*

Note to the interviewer for clarification:

You may wonder, why the question does not read:

> "To what level of the EQF would you assign the *certificate/qualification* issued by a such a training programme?"

The reason is that especially higher EQF level qualifications normally imply rather extended training programmes. For example, EQF level 5 corresponds to a full Bachelor degree! A training course such as the one which DEMAL intends to develop could therefore hardly represent an EQF level 5 qualification in its own right. One can however, with some justification, take the view, that the <u>competences</u> developed by the planned DEMAL courses actually need to <u>be at the level of</u> a full EQF 5 (or 4, 6, 7 …) qualification. (In practical terms, one could, for example. imagine that a DEMAL course provider enters a cooperation with a university and that students may earn some credits towards a Bachelor degree by successfully completing a DEMAL course …).

Interviewees should therefore just concentrate on the question, which EQF level descriptions fit best the *competencies* needed for designing/evaluating of adult learning.

Info Box: Level descriptors of the European Qualifications Framework (EQF)			
	Knowledge	**Skills**	**Competence**
Learning outcomes at the various levels	In the context of EQF, knowledge is described as theoretical and/or factual	In the context of EQF, skills are described as cognitive (involving the use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools and instruments)	In the context of EQF, competence is described in terms of responsibility and autonomy
Level 1	basic general knowledge	basic skills required to carry out simple tasks	work or study under direct supervision in a structured context
Level 2	basic factual knowledge of a field of work or study	basic cognitive and practical skills required to use relevant information in order to carry out tasks and to solve routine problems using simple rules and tools	work or study under supervision with some autonomy
Level 3	knowledge of facts, principles, processes and general concepts, in a field of work or study	a range of cognitive and practical skills required to accomplish tasks and solve problems by selecting and applying basic methods, tools, materials and information	take responsibility for completion of tasks in work or study adapt own behaviour to circumstances in solving problems
Level 4	factual and theoretical knowledge in broad contexts within a field of work or study	a range of cognitive and practical skills required to generate solutions to specific problems in a field of work or study	exercise self-management within the guidelines of work or study contexts that are usually predictable, but are subject to change

			supervise the routine work of others, taking some responsibility for the evaluation and improvement of work or study activities
Level 5	comprehensive, specialised, factual and theoretical knowledge within a field of work or study and an awareness of the boundaries of that knowledge	a comprehensive range of cognitive and practical skills required to develop creative solutions to abstract problems	exercise management and supervision in contexts of work or study activities where there is unpredictable change review and develop performance of self and others
Level 6	advanced knowledge of a field of work or study, involving a critical understanding of theories and principles	advanced skills, demonstrating mastery and innovation, required to solve complex and unpredictable problems in a specialised field of work or study	manage complex technical or professional activities or projects, taking responsibility for decisionmaking in unpredictable work or study contexts take responsibility for managing professional development of individuals and groups
Level 7	highly specialised knowledge, some of which is at the forefront of knowledge in a field of work or study, as the basis for original thinking and/or research critical awareness of knowledge issues in a field and at the interface between different fields	specialised problem-solving skills required in research and/or innovation in order to develop new knowledge and procedures and to integrate knowledge from different fields	manage and transform work or study contexts that are complex, unpredictable and require new strategic approaches take responsibility for contributing to professional knowledge and practice and/or for reviewing the strategic performance of teams
Level 8	knowledge at the most advanced frontier of a field of work or study and at the interface between fields	the most advanced and specialised skills and techniques, including synthesis and evaluation, required to solve critical problems in research and/or innovation and to extend and redefine existing knowledge or professional practice	demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the development of new ideas or processes at the forefront of work or study contexts including research

*QG1a) If you think that **different EQF levels** are relevant, please comment: Which levels would these be and why?*

prompt:

- could the competencies needed for "designing" and "evaluating" of adult learning be meaningfully diversified for different levels of the EQF levels (e.g. 3-4-5; or 5-6, or …) according to an increasing degree of expertise of the adult learning professional?
- how would you define/name these different levels (e.g. "beginner", "advanced professional", "master", "expert", …)?

H) Other

Q H1): Is there anything you would like to add?

Q H2: [in case, interviewee has mentioned relevant documents, materials etc.] Could you provide us the material you mentioned?

I) End

Interviewers thank interviewee for their support

c2) Interviewees profiles

Interview ID	Interviewee Profile
DE01	Female, 15 years experience as a trainer, training is main job; conducts staff training for a social enterprise and soft skill trainings and team building workshops for various corporate clients
DE02	Female, 18 years experience as a trainer with training being the main job; conducts ICT courses (Microsoft Office applications, internet) for adult education community centres, companies and individual clients
DE03	Male, scholar in education sciences; teaches and researches at a university; main research areas include adult education course (teaching); conducts postgraduate research on microdidactic planning in company-based training contexts
DE04	Female, language teacher and portfolio counsellor; works for adult education centres and non-profit organisations
DE05	Female, works the train-the-trainer field; counselling and concept development for companies in the field of training and HRD; soft skills training
DE06	Female, degree in education science/adult education; more than 10 years experience as trainer in various settings including company-based training and adult education courses provided by the church; a major focus of her work is on quality of teaching in higher education institutions; including teaching of mature students.
ES01	female; social and inclusion project manager of Fundación Fondo Formación; target groups: adult immigrants; women; long term unemployed people; specific responsibilities include: identification and selection of teaching activities according to target group and context; works also as a trainer (soft skill development for employment)
ES02	female; works as facilitator in the international DEMOLA project: around 80 facilitaors accompany university students and companies in their processes; acts as a bridge between the people that want to learn and the practical part on how to learn; works in soft skills development;
ES03	female, freelance adult trainer and accompaniment person in processes of personal promotion and empowerment; subjects linked to pedagogy and equality of women and men; substantial experience as a teacher
ES04	female; has been working in a consultancy and training organization for 15 years: as teacher (ICT subjects) and as learning processes manager.
ES05	female; works in a municipality organisation with guidance activities for adults: informing then about training possibilities that fit with their profile; helping them to insert in the labour market is needed; definition of individual itineraries; has also own teaching experience.
GR01	male; electrical and computer engineer with MA/PhD studies on Political Ecology, Environmental Engineering and Development Studies; works as a freelance educator on issues related with Environmental Studies and Sustainable Development; works mainly with training companies an NGOs; core professional activities include creation of training material and teaching.
GR02	female; art teacher specialized in art education; teaches in public schools, private schools of art and training institutes for adults; further activities. scheduling, organizing and animating art workshops and activities for museums and cultural associations; study and animation of seminars for teachers and pedagogues. …(art teaching, interdisciplinary, creative learning)
GR03	female; counselor psychologist, works as freelancer in private sector; first degree in management and experience in business sector; teaches business skills; works as instructor in different seminars

GR04	male, freelance consulting trainer, works with a company in Greece, with an international training company and with IDEC; has worked for ten years as a teacher
GR05	female, play writer for a theatre group; teaches regularly play writing at the university
HU 4	male, works for a private adult learning provider specialised in corporate language training; PhD in English language and literature; 10 years' active experience as a teacher of English in corporate environment and as an (adult) teacher supervisor, lead teacher; does corporate trainings in English language negotiation skills and T group training.
HU01	male; mental health specialist, economist-sociologist and teacher; work as a freelance trainer in his own company; Major training areas are: burn-out prevention; conflict management; communication; organisational development; does usually short, max. 20-hour training programs
HU02	female, freelance English language teacher working for language schools; works mainly with middle and top management professionals in a company environment; has also worked as a trainer in the field of communication skills; graduated as an ESL teacher (BA) and studied for a MA in English and American Language and Literature; more than 20 years of teaching experience;
HU03	female, teacher by profession; has taught competence development subjects at the Teacher Training Institute of the University of Western Hungary and has worked as a competence development trainer in projects; works currently as freelance trainer in the field of learning skills development, stress management, personality development and self-awareness raising, working with children and adults as well
HU05	female, adult learning professional, visiting lecturer at ELTE University Budapest, Faculty of Androgogy, Institute of Pedagogy and Psychology. Professional leader of the Museum Education and Methodological Centre.
RO01	female, professor at University of Bucharest, Head of the Department of Educational Sciences; her professional role is to provide teaching activities, research and some management activities related to her position as a Head.
RO02	female, lecturer at University of Bucharest, Faculty of Psychology and Educational Sciences; her professional role is to provide teaching activities and activities related to research. has also acted as a national expert for a project managed by the European Commission
RO03	female; works in the department of Quality Assurance of the Romanian National Agency for EU-lifelong learning programmes; is in charge of supervising the projects financed by the Erasmus+ Program; provides counselling for the beneficiaries of the Erasmus+ projects
RO04	female, university professor at the University of Timisoara; has been involved in various projects throughout her career, mainly in the adult education field. Teaching is a major part of her activity. She is also involved in research and managerial related activities.
RO05	female, works as researcher and deputy director in the Institute of Educational Sciences in Bucharest, has over 15 years of experience in the field of educational research and adult education, gained through research activities, participation and coordination of national or international projects all related to the topic of adult education or continuing vocational training of adults.

d1) Desk research Reporting Template

d2) Desk research country files

(See separate file for Annex d)

DEMAL

Designing, monitoring and evaluating adult learning classes
Supporting quality in adult learning

"Designing, monitoring and evaluating adult learning classes – Supporting quality in adult learning" (DEMAL)

is an Erasmus+ Strategic Partnership project, running from October 2016 to September 2018.

Project Aims

DEMAL seeks to contribute to the quality of adult learning by promoting two professional key competences of adult educators and trainers:

- Design of the Adult Learning Process, and
- Monitoring and Evaluation of the Adult Learning Process

Both competences can be considered as essential prerequisites for ensuring that the adult learning provision is effective, of high quality and matches the needs of the learners.

Project Objectives

- develop two detailed European reference profiles for these key competences, linked to the EQF;
- develop and pilot two in-service training courses (e-learning plus one-week workshop) including the related learning resources for these key competences
- test the potential of an innovative course planning app to support both self-directed learning and the enhanced professional everyday practice of teachers and trainers of adults in Europe
- develop and pilot a validation framework to enhance the comparability of existing training provision and qualifications, and facilitate the recognition of informally acquired competences, and thus enhance the flexibility of qualification routes for adult learning staff in Europe

Target group

Staff in adult learning organisations with diverse educational and professional backgrounds, engaged with the tasks of designing training programmes and monitoring and evaluating the learning process.