



# Network memorandum

## Deliverable 9.3

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## 1 Summary

The Memorandum of CIM within REVEAL relates to three main aspects:

A: Quality

B: Valorisation and

C: Networking

### Quality:

The quality aspect is thoroughly described in the first chapters of the paper on hand: It starts with a description of our approaches to Continuing Professional Development of Educators in Higher Education Institutes (HEI) and Business, presents our competence framework related to Facilitation of Design Based Collaborative Learning (DBCL) before moving into the collaborative platform providing interactive services, which was customised within the CIM project.

### Valorisation

The valorisation strategy was developed for the services and products developed by the CIM community. Counselling, co-creation and development services have been offered in the following areas:

- (1) The **competence oriented learning and validation approach** is the core of our approach. It combines needs driven, modern didactics with competence validation and state of the art learning technologies.
- (2) CIM offers a programme for Continuing Professional Development (CPD) for Learning and Development professionals in OER learning technologies and contents under (<https://learningsuite.mathetics.eu/group/view.php?id=1> )
- (3) REVEAL offers powerful CPD learning environments, based on OER contents and technologies and eventually
- (4) REVEAL offers Innovative learning technologies and infrastructure support.

### Networking

All products, services and technologies which have been developed in our R&D projects have been organised under the umbrella of the REVEAL network, CIM section.

The REVEAL network is an association which serves its members with joint projects, approaches, tools and instruments. In the framework of the project it has been fully developed and founded as an association according to German law. Based on our surveys we understood that the level of organisation and the resources and capacities of AE stakeholders are very low. Hence the entry threshold is very low (no entry fees).

An appropriate organisational structure has been developed within REVEAL to maintain the network and to make it sustainable.



## 2 Foreword and Introduction

The publication on hand was developed in the framework of several educational communities, lately by the CIM project consortium, by experts from educational research and practice.

Up to 2021 REVEAL has been developed to a European umbrella organisation of institutions from 27 countries working together in modern, human centred education, training, professional and personal development.

Between 2017 and 2019 a project team has worked on a European professionalization strategy for educational professionals and produced three main outputs:

1. A CPD concept in Competence Oriented Learning and Validation based on a complete competence framework for educators
2. A web-based platform accessible via <https://learningsuite.mathetics.eu/group/view.php?id=1> ) as a hub for CPD offers (courses, materials, groups projects, links to synchronous collaboration tools (MIRO)) for Learning and Development facilitators of Design Based Collaborative Learning
3. A valorisation and implementation concept for the REVEAL community which embraces not only the general professionalization of Learning and Development facilitators within Creativity and Innovation Management

The publication also reflects the works that our community has carried out in the last decade and the experiences we gathered in more than 40 R&D projects funded by European Educational programmes from Socrates, the sub-programmes of the LLP up to ERASMUS+.

Based on our works in the last years we observed two parallel phenomena:

- On the one hand there is the rather amorphous education sector on “Entrepreneurship and Innovation” with blurred boundaries ranging from “informal adult education” to formalised Higher Education.
- On the other hand we have an overarching, inter-sectoral need for good teaching and learning methods<sup>1</sup>.

If we want to create a “European Continuing Professional Development Culture” it seems meaningful to bridge the sector specific boundaries, because they are no discrete categories anyway.

Consequently, we should open our CPD programmes to all persons who are involved in personal and professional development, since we strongly believe that learning happens everywhere. Our vision is a high-quality approach for a large range of stakeholders working in informal, non-formal and formal contexts, creating and developing competences of their learners.

Since the foundation of our European network we have developed and substantiated quality driven approaches, methods and tools to support new ways of learning and development and to measure its impact, also aided by state-of-the-art learning technologies.

The Implementation Strategy on hand describes how we are planning to bring about our approach on “Facilitation Creativity and Innovation” and to deploy and roll out the tools and instruments that our network has constantly been developing.

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<sup>1</sup> Educators need competences for modern learning, independent from the sectors; especially and also in highly theoretical learning environments.



### 3 Quality of Professional Development of L&D Professionals

#### 3.1. Introduction

##### Terminologies

To indicate the “New” way of teaching and training which is more “mathetical” (learner centred) and less “didactical” (teacher driven) we unite behind a few basic terms that we will deploy in our work:

- The term competence is understood as the ability of a person to apply a combination of Knowledge, skills and attitudes in a particular context and in a particular quality.
- Learning and Competence Development is a larger concept than “Qualification” since it also relates to (constant) personal development and highly contextualised, constructive and connective settings
- The role of the teachers and trainers has to change (and their own view on their profession and on their tasks) to a “Facilitator” of learning
- Their “Facilitation Competences are rather independent from the educational sector and also include the facilitation of rather informal, practical learning at the workplace, in business and NGOs and other organisations.
- We therefore call the Educationalists “Learning and Development Professionals” who facilitate learning

##### Facilitating Learning in Times of Corona

The CIM project was largely affected by the Covid pandemic in the years 2020 to 2021. Direct encounters and with it personal (F2F) teamwork and joint development processes were impossible.

The CIM/REVEAL consortium developed and piloted a number of innovative, very successful and high quality online collaboration approaches combining all kinds of available technologies to promote interactive, interdisciplinary and intersectoral learning and collaboration formats. The EU-wide collaboration of students and professionals was a specially valuable momentum therein.

To describe this format, we coined the terms

- Design Based Collaborative Learning (DBCL) and
- Design Based Collaborative Research (DBCR) <sup>2</sup>

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<sup>2</sup> DBCR has been introduced in first pilot activities from 2021 onwards in joint European practice research activities within 6 HEI in CIM and beyond in the HEI REVEAL community



### 3.2. Trends in CPD for Educationalists

#### From in-service courses towards lifelong in-service learning

Along similar lines as the consecutive views on learning, we see trends in the way in which professional development of educators has been perceived and approached throughout the last decades. The roles of those who promote and facilitate their professional development evolved accordingly.

#### In-Service Training Courses

Traditionally the professional development of trainers was organized as in-service courses, aimed at updating knowledge and skills in subject matter and occasionally in educating methods. The focus was on being trained rather than on professional learning. In the seventies the emphasis on professional learning shifted from skills training towards approaches more focused on teacher thinking and teacher planning processes.

#### Tailored in-service education

After a long tradition of training focused on individual teachers, offered by universities and colleges, the concept of school-based in-service was explored. Learning was not only a matter of being trained, it was a matter of committing oneself both as an individual and as a team.

Schools/organisations/began to take more responsibility for their development as an organization and in-service education became more demand driven. Learning in in-service education had to be more tailored to specific work situations. This new approach of site-based in-service required new competences among in-service educators. They now had to fulfil several roles: as catalyst, problem solver, process helper and resources linker.

#### From in-service education to in-service learning

School based in-service was the dominant approach for some years but then an awareness arose of the necessity to learn at the workplace, using internal resources. After all, transfer of what was learned to daily practice remained insufficient. Constructivism entered the field of professional development of educators. With induction programmes for beginning educators at the workplace, mentoring and coaching, teacher portfolio's, etc., the focus was on learning as a part of integrated process of professional development.

In-service educators re-defined their positions and assumed the role of facilitators of learning. Gradually the emphasis shifted to more co-operative forms of in-service learning. Professional learning communities, communities of practice, study circles, networks and partnerships became terms frequently used. Still the focus was mainly internal.

#### Contextual learning in management and teaching

Whereas in-service learning can still be considered as an activity that alternates with working – one learns and then one applies – the idea behind knowledge productivity is that change and innovation are not interruptions of stable periods in which practice doesn't change too much. On the contrary, change and innovation were seen to be the 'normal' situation. Current views include the idea that educative organisations, and maybe the educational profession, as well as society as a whole, provide educators and managers with an environment that continuously evokes learning, that helps them to produce and create knowledge, and stimulates them to upgrade the profession and their own competences repertoire within it. The challenge became to optimize this environment as a learning environment for all parties involved. We live in a learning landscape in which we upload and download



knowledge, in which we produce and share knowledge, in which professionals cross borders and barriers and in which they include many media and modes of learning. Increasingly. The necessity of learning increases; the complexity of learning increases; the modes of learning become more varied and at the same time we see that professional learning increasingly becomes part of the work. It seems no longer possible, nor desirable to make a distinction between work and professional learning. Professional learning has become our work. Teaching and learning amalgamated. The same applies to management and professional learning. Managers and school leaders are learners and facilitators in a learning environment for all.

### Learning beyond Organisations

Learning so far was treated as something that happens within school organisations. The reality is that much learning occurs between organisations, or between persons in a variety of contexts and interconnections. Educators and other professionals work in their own settings. At the same time however they take part in professional networks of various kinds. A few examples of networks, that may extend beyond one's own organisation:

- Communities of practice
- Alumni networks
- Search engines (Google)
- Associations, networks, conferences
- Partnerships
- International links
- E-learning environments
- Data bases
- Peers, professional and other friends, family
- Social media
- Blogs
- Synchronous web-based communication

At all levels and in different circles people get input that adds to their experience and competence. The organisation curriculum sketched above would be too narrow a concept, if it would make us neglect these processes that often occur beyond the direct sphere of influence of one's own organisation. A curriculum for learning refers to a wider landscape that exists beyond organisations, that is partly virtual and that allows us to create and produce knowledge that exists beyond the individual human mind. It is the body of knowledge that composes the knowledge/competences included in the profession.

### 3.3. Quality Criteria and Learning Activities in CPD for Facilitators

Continuous professional development - in view of Education & Training 2020 - calls for competence development, for a needs-oriented approach, an international profile, validation of learning outcomes, learning agreements and puts forward a number of priority themes in regard to CIM.

This frames the CPD quality criteria for CIM; offers should be

- be innovative and competence oriented
- care for quality and have a self-evaluation system on board
- link up with European education priorities
- include a European dimension and exploit the European added value





- engage in learning agreements and validation of the individual learning outcomes
- use ICT in an appropriate way
- take care of transfer and impact

Within REVEAL we focus on facilitators of CIM in various contexts, some of them are involved in Higher Education, some are mentors, others facilitate in courses, others may be involved in mobility's. people may be involved as managers responsible for the professional development of staff, or as staff attending courses or as participants in other mobility like activities. In each kind of involvement, the challenge is to organise and design the learning environment and activities in a way that facilitates the acquisition of competences optimally, both as learning experience and as inspiration for personal growth.

In the learning arrangements needed to promote learning among facilitators in an international EU context, like we wish to establish in the CIM section within the REVEAL network. Various activities may be included that promote learning in a competence-oriented way. These activities may include:

#### *Work learning processes*

Work-learning refers to opportunities to engage in any kind of work for which the eventual required competence level still has to be acquired, while at the same time or alternately knowledge skills and attitude are acquired to reach the required level of performance. Such experiences need to be embedded in processes of feedback and dialogue

#### *Shadowing*

Shadowing is limited to observing others while they perform their professional tasks. Such learning process gains value if it is a process one may identify with. So a good relation between the shadower and the one being shadowed is of vital importance. Even though the activities are not shared the learning it evokes may well be shared. Reflective dialogues are needed for that

#### *Attending courses*

Courses at first glance may seem the more traditional approach to learning, but course may very well be designed in a competence-oriented way, including meaningful hands on experiences, followed by feedback and reflective dialogue. A big advantage of the course mode is the presence of others to identify with and to share your analyses and reflections with. These interactions with peer learners add depth and variety to the learning process

#### *Action research*

Already in the eighties of the previous century the idea of teachers as researchers was launched<sup>3</sup>. The idea is that teachers who engage in practical research, develop a sense of self-directed learning in which they build new and personalised knowledge to be applied in their own practice. This way their knowledge is situated, personalised and may be shared with peer teachers. It is important that educators use research as a means for their own development, which implies that the themes should be highly relevant and not too academic.

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<sup>3</sup> Nixon, J. (1989, Winter). The teacher as researcher: Contradictions and continuities. *Peabody Journal of Education*, 64(2), 20-32. EJ 395 998





### *Narratives/story telling*

Story telling is a highly powerful way to make learners experience their work and their learning trajectories as journey with themselves as the protagonists and navigators. The communicative part of the storytelling strengthens the possibility to identify with each other experiences and learning outcomes. The element of creativity and art that is to be integrated in a story telling, or narrative approach, helps the participants to process the stories, to identify with them and to gain a sense of meaning that goes way beyond just the content of what is shared. People may really connect and touch wavelengths that otherwise may have remained untouched

### *Creative reporting*

Whatever mode of learning adult educators may choose to be part of , the process gain value once it will lead to a memorable output. This may be a report, but better is to make it a creative report including elements such as photo's recordings, recipes, drawings, cartoons etc. The sense of ownership of the learning process and outcomes will grow as a consequences and what's more. The tangible memory will keep the experience alive way beyond the actual duration of the activity .

### *Product development*

What was explained above is even stronger once when people actually create a product. This may be of various kinds. It may be a video production, a tool, a booklet, a painting, a model or a song. The idea is that it even more than creative reporting it will produce a tangible memory and anchor for future reflection. The idea of analysing a situation, detecting problems, developing solutions and applying such a solution while reflecting on it parallels the core thoughts of design thinking. Working according such steps helps people to feel the architect and the beneficiary of the solutions they came up with.

### *Blended learning*

The learning environment in today's society increasing has become virtual. Through Internet, media and social media the world of educators has grown bigger. Knowledge is available in many sources. Communication about issues may be done instantly with colleagues anywhere. These opportunities have profoundly affected the learning environments of people and the roles of those who are involved in it either as learners or as facilitators. Connectivity is an important asset in learning environment. Still at times it will be necessary to focus on the processes of learning and of co-operation learners are involved in in their groups without distractions from the outside world. For that purpose it is a challenge to find a balance between phases of learning in which it is beneficial to connect and phases in which it is better to switch off and concentrate on the (learning) processes and people in the group.

### 3.4. Professional Competences for Facilitators

With the definition of competence in mind and building upon the result of the EU studies, on the competences of facilitators<sup>4</sup>, we made an inventory of the competences an in-service course organiser would need to have. The elaboration of these competences is made according to the competence model included earlier in this document.

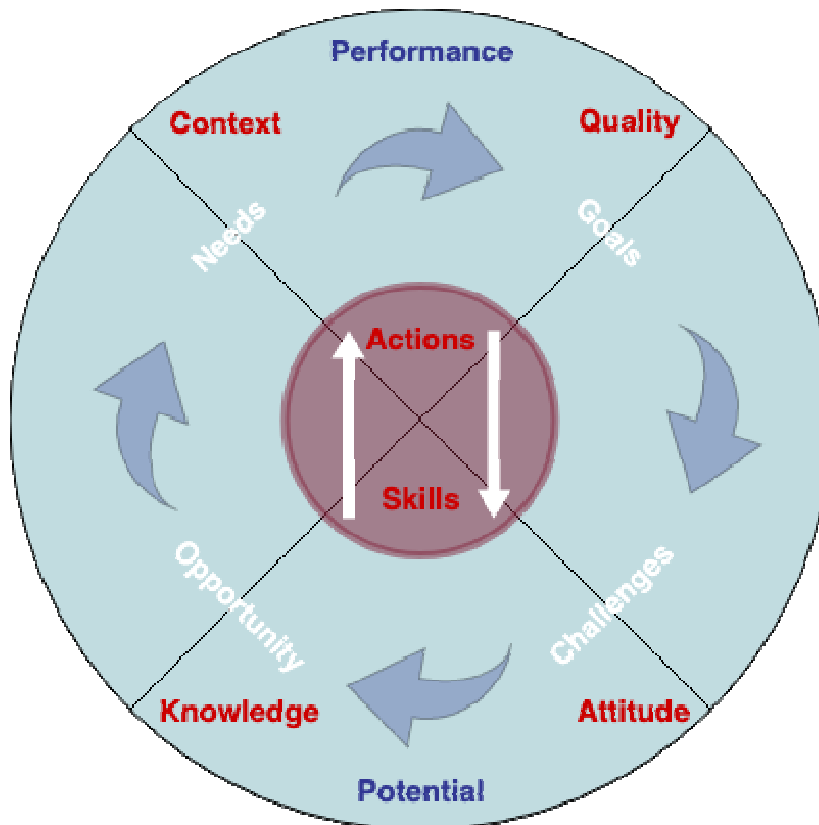


Fig. 1. The engine of the learning process

It includes the knowledge, the attitudes and the skills required and the actions that the course organizers or mobility facilitators will need to show in a variety of contexts and with a particular quality. The competence profile mentioned above serves as the basis for the elaborations below. The focus is on the competences of organising and implementing international courses, or mobility learning offers. The elaboration, as does the model, consists of two sectors/triangles. One includes all knowledge, skills and attitudinal elements as derived from a literature search on the relevant background of course organisers and trainers.

The actual competences is assumed to be an integral synthesis of these components that is demonstrated in, or shown in behaviour in a relevant and authentic context at a defined level of quality.

These last three elements (behaviour, context and quality are assumed to be connected by a contextual mechanism in which the organisers/trainers are moved forward by an awareness of their needs and the goals they set given the challenges, and opportunities they are facing. The competences as defined this exhaustive and analytical way (including all angles of the two triangles) include a richness of details. This is an advantage (the richness) and a disadvantage, the number of details. That is why after this exercise of unravelling the competences, we make an attempt to reduce the number

<sup>4</sup> KCAE Study, The GINCO projects and PROVIDE, IMPACT



of details again into a smaller set of core competences. The richness of the triangles as outlined above serves as a background legitimization of the core competences identified, and is a helpful source when later in the process the core competences will have to be turned into a professional profile, a course offer, or mobility offer; an assessment, or a validation process and tool. The elaborated profiles are made available in the appendix of this article (appendix 1).

For practical purposes we will focus on a manageable number of 24 competences we clustered based on the analysis mentioned.

They are clustered in 4 action areas relevant for educational professionals and relate to:

1. Competences **to plan** Competence Oriented Learning
2. Competences **to deliver** Competence Oriented Learning
3. Competences **to validate** Competences
4. Competences **to evaluate** Competence Oriented Learning

Additionally there are a number of generic competences that Educators should acquire to perform in competence oriented learning arrangements.

The inventory of competences for COL&V gives an overview of 24 identified competences for educational professionals. These competences are clustered into 5 competence areas: planning competences, competences related to the delivery of training, competences related to evaluation and validation and generic competences.

		Competences <b>to plan</b> Competence Oriented Learning	
1	P1	Planning, preparation	Assessing learners' needs and motivations
2	P2	Planning, preparation	Designing and constructing trainings and programmes
3	P3	Planning, preparation	Planning and designing the learning process
4	P4	Planning, delivery	Deploying different learning methods, styles and techniques
5	P5	Planning, delivery	Creating competence oriented learning offers:
6	P6	Planning, delivery	Creating an open learning environment
		2. Competences <b>to deliver</b> Competence Oriented Learning	
7	D1	Delivery	Facilitating ICT based learning
8	D2	Delivery	Facilitating (open) learning processes
9	D3	Support	Advising/counselling on career and further life planning
10	D4	Support	Mentoring an intern/trainee/apprentice
		3. Competences <b>to evaluate</b> Competence Oriented Learning	
11	E1	Evaluation, QM	Designing an evaluation process
12	E2	Evaluation, QM	Defining the right indicators and apply the right instruments for evaluation
		4. Competences <b>to validate</b> Competences	
13	V1	Validation	Assessing competences and competence developments



14	V2	Validation	Evidencing competence developments in terms of learning outcomes
15	V3	Validation	Integrating validation concepts promoted by the EU
		5. Generic Competences	
16	G1	Personal/delivery	Being an expert in the content matter
17	G2	Self/personal	Lifelong learning
18	G3	Social/delivery	Motivating/empowering learners
20	G4	Social	Communication
21	G5	Social	Team work
22	G6	Social	Networking
23	G7	Social	Managing diversity
24	G8	Social	Intercultural communication

In the following each of the competences is described in terms of abstract and general learning outcomes that relate to an ideal, which a professional working in this field should aspire.

### 3.4.1. Planning Competences

#### P1: Assessing learners' needs and motivations

Description: The learning professional is competent in assessing the prior experience of learners, identification of the perceived learning needs, demands, motivations and wishes of learners. This includes insights into the intrinsic motivation (e.g., self-generated willingness to learn), and the extrinsic motivation (e.g., responsiveness to external pressures from others, the reward of a diploma or mandatory requirements) of the learners, the learning trajectories and careers (including gaps) and the societal learning needs, including the key competences in lifelong learning. In assessing learning needs, the professional is able to listen carefully, deploy interview techniques, read body language, and deal with possible language difficulties and other disadvantages. The professional is able to respond to learning needs by deploying a wide range of teaching strategies and is able to see the background, expertise and knowledge of the learners as a learning resource to be used in the learning process.

#### P2: Designing and constructing trainings and programmes

Description: The learning professional has the competence to design and construct study programmes for learners that are embedded in a wider curricular context and which allow the development of the learners into, or as, fully autonomous life-long learners. The programmes are based on relevant learning theory and the needs and demands of the learners, views on group dynamics, classroom management, the use of course ware and assessment. Furthermore, the professional is able to develop appropriate instructional and assessment instruments that are constructively aligned to aims and objectives and that are attuned to learning theories. The programmes should be deliverable by other learning professionals.

#### P3: Planning and designing the learning process



Description: The learning professional is competent in designing the learning process for learners of different target groups. On one hand this competence entails the knowledge of the learning needs and deficits of the learners, the level of the learners and the heterogeneity of the group for whom the learning process is developed (if the learning takes place in a group setting). On the other hand the professional must have knowledge on the different learning phases, processes, styles, methods and programme designs that can be deployed to facilitate The learning process. The design of the learning process can be for individual ( ) learners as well as for a group of ( ) learners. The learning professional is able to use his/her own expertise and knowledge of relevant learning resources and the potential of the learners themselves to design the learning process. Furthermore, the 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.

#### **P4: Deploying different learning methods, styles and techniques**

Description: The learning professional is competent in, and shows confidence in, using different learning methods (didactics), styles (approaches) and techniques including new media, ICT and social networks in the learning process of s. Didactics refers to specific methods to enable learners to learn and gain knowledge and skills. Approaches alludes to the different styles of transferring knowledge, which includes traditional teaching, facilitating,

coaching and supporting learners in their own learning process. Furthermore the professional should be aware of relevant recent developments concerning new methods, styles and techniques, and of the new possibilities that come with this. Also, the professional is able to critically assess the value of new technologies for the learners.

#### **P5: Creating competence oriented learning**

Description: The learning professionals knows how to systematically plan, organise and elaborate a learning experience and the necessary conditions to launch, support, maintain and promote this experience. In order to do that they use guidelines on how to set and formulate competence oriented goals. They are familiar with ideas on self regulated and contextual learning. They know what kinds of (learning) activities support distinct competence developments. And know how to evoke these activities by means of actions, tasks, assignments and settings. They are able to create the open learning environments needed to ensure motivating, rich and reflective learning conditions (including required sources and resources, ICT infrastructure/equipment/software), or see to it that this is taken care of properly. They are well aware of, and capable in planning the learning conditions in such a way that the learners can work on the development of their competences in mutually beneficial ways.

#### **P6: Creating an open learning environment**

The learning professional is competent in creating open learning environments. The professional is able to design, develop, implement, and facilitate learning in open environments and can give support to learning professionals working with, or in, open learning environment and learners who use them to further develop themselves. Furthermore, the professional is able to assess the effectiveness of the open learning environment.

### **3.4.2. Competences when Delivering Learning and Training**

#### **D1: Facilitating ICT based learning environments**



Description: The learning professional is competent in facilitating and supporting ICT based learning environments. The professional is able to design, develop, implement, and facilitate ICT-based learning environments and can give support to learning professionals working with, or in, ICT-based learning environment and learners who use ICT to further develop themselves. Furthermore, the professional is able to assess the effectiveness of the ICT-based learning environment.

### **D2: Facilitating (open) learning processes**

Description: The learning professional has the competence to guide learners in their learning processes and in further development toward, or as, fully autonomous lifelong learners. The professional supports the learner in reaching the objectives of the learning process and in following the defined learning strategy. The professional is able to use different learning methods (didactics), styles (approaches) and techniques, including the use of new media and ICT. She or he is able to relate learning to everyday life and to attune the learning process to the living world of the learners. The professional is able to provide relevant and contextualised tasks and activities and assess the outcomes of these. The professional is flexible and has the ability to change the learning strategy when necessary. The professional ought to be able to align the learning process properly according to the delivery mode and context (traditional classroom, distance learning, in-service, workplace, etc.).

### **D3: Advising/counselling on career and further life planning**

Description: The learning professional is competent in advising learners in their career, life, further development and, if necessary, is able to refer s to other professionals (in case of professional help, illness etc.). The professional has knowledge on career information, work environments and educational offerings, and is able to assess the need for professional help. The professional has knowledge and understanding of the stages of development of the learner and has the ability to use tests to collect information on characteristics of the learner.

### **D4: Mentoring an intern/trainee/apprentice**

Description: The learning professional is competent to accompany a learner who is placed into his/her working environment. In many cases the professional may not have an educational background. However, it will certainly improve the efficiency and the impact of this important learning modality that the person has a basic understanding and skills and a positive attitude regarding this competence. In educational terms mentoring comes very near to the instructional model of a hospitation (learning from a model). It is most effective if the placement is taking part in a structured and planned way (e.g. as a project).

## **3.4.3. Evaluation Competences**

### **E1: Designing an evaluation process**

Description: The learning professional is competent to design an evaluation process and to transfer it to other domains of work. He/ she is able to adapt the design according to the learning needs of the learners. In order to design an evaluation process, the learning process needs to have profound knowledge about a variety of evaluation methods and techniques, and is able to apply them according to the concrete group needs and the conducted training and the transmitted knowledge. He or she is self-reflective and uses methods of self-evaluation as well.

### **E2: Defining the right indicators and apply the right instruments for evaluation**



Description: The learning professional is competent in using appropriate evaluation instruments and to create and apply the right indicators to get reasonable results and to facilitate the evidencing of the evaluation results.

### 3.4.4. Validation Competences

#### **V1: Assessing competences and competence developments**

Description: The learning professional is competent to assess competence developments, and is aware of the importance of this task for learners, educators and staff who are in contact with the learners in different learning contexts. He/she is aware that the context may vary depending on learners' groups, the setting and the level of formalisation. It is also determined by the purpose of validation (internally to prove the efficiency of the learning or external to illustrate the potential of the learner).

Assessment can serve to check/measure the performances of learners or even be used as motivation to continue learning (summative assessment vs. formative assessment). Hence the assessment settings and methods have to be chosen in accordance to the context, the purpose and also regarding the available resources. Assessment can (ideally) be built in the learning process to achieve a holistic learning design.

#### **V2: Evidencing competence developments in terms of learning outcomes**

Description: The learning professional is able to rate and evidence learners' competences and competence developments, providing evidence and to document (describe) learning outcomes. It requires knowledge on theories about competence development, the concept of learning outcomes, and skills how to describe them in a correct and meaningful way and a respective attitude to do so. It also requires knowledge and skills on quality assurance and criteria (validity, objectivity, reliability, level consistency). It relates to educators and staff who are in contact with the learners in different learning context.

The context may vary with the learners' groups, the setting and the level of formalisation.

It is also determined by the purpose of validation (internally to prove the efficiency of the learning or external to illustrate the potential of the learner).

#### **V3: Integrating validation concepts promoted by the EU**

Description: The learning professional is able to connect competence assessments and ratings with LEVEL5 to EUROPASS, EQF ECVET and/or other official frameworks. This requires knowledge on those frameworks and the whole validation approach as promoted by the European commission, skills in applying them and the respective attitudes concerning the aims and appropriate utilisation of these European systems. It requires knowledge on the structures, elements and principles of those tools and instruments as well as on the whole validation concept. This competence relates to the ability to transfer competences and competence developments into the systems based on EQR, to describe learning outcomes for qualifications, to rate learners according to those LO descriptions and to allocate the ratings in learning units and respective EQR-levels.

This competence is important for educators and staff who are validating learners in different learning contexts, be it in real validation situations related to the recognition of prior learning (validation shall be introduced in every members state by 2018) or in learning situations in which the assessment and documentation of competences plays a role. They should also know the connections and interfaces of these systems to Open Learning Environments (e.g. e-Portfolios). Finally they should know about the challenges and interfaces between the EU validation system and concepts like social, personal and organisational competences and key competences.







### 3.4.5. Generic Competences

#### **G1: Being an expert in the content matter**

Description: The learning professional is competent in using their own expertise in a specific field of study or a field of practice and is aware of relevant recent developments in the (academic) field of study or practice. This not only to transfer knowledge or skills but also, by selecting and providing resources, to enable learners to learn and develop themselves. Closely related to this competence comes the competence to choose and attune resources to the educational level and background of learners.

#### **G2: Being a lifelong learner**

Description: The learning professional is competent in systematic reflection of their own practices, learning and personal development and is able to incorporate the findings of that reflection into their own professional practice.

The professional is able to see their own practice within the larger context of the institute, sector, the wider profession and society and is able to define their own role and responsibility within these contexts. With regard to this responsibility, the professional portrays consistency, authenticity, discipline and critical thinking. The professional is concerned about their own development, is willing to further develop and improve him/herself and sees him/herself as an autonomous lifelong learner. Furthermore, the learning professional has some basic organisational skills, such as time management.

#### **G3: Motivating/empowering learners**

Description: The learning professional is competent in empowering the learners to develop themselves towards, or as, autonomous lifelong learners. The professional is able to use different styles and techniques to motivate, empower and inspire learners in their learning process and is able to make the relevance of the learning clear from a broader perspective. The learning professional is responsible for creating a stimulating learning environment for learners.

#### **G4: Being a communicator**

Description: The learning professional is competent in communicating with others involved in professional practice, is able to establish a relation of trust and shows integrity through his/her way to communicate. In the communication with learners and with colleagues the VET professional is aware of different communication styles and techniques and that different situations and setting require different styles and techniques of communication. Communication is used by the educator as a means for interaction with learners and colleagues and through appropriate communication the professional can identify problems, can discuss them and find solutions in improving the learning process.

#### **G5: Being a team player**

Description: The learning professional is competent in interacting with others involved in professional practice appropriately. In the collaboration the professional respects specific backgrounds, competences and skills of team/group members and has the ability to act as a team player. This involves communication skills like assertiveness, clarity and active listening, awareness of diversity in teams and potentials of teamwork. He/she has an attitude of appreciation for teamwork as efficient way of collaborating and source of creativity and is determined to contribute to the success of the entire team. He/she is aware of the roles and capabilities in the team and acts accordingly.



### **G6: Being a networker**

Description: The learning professional is competent in interacting with others involved in professional practice, is able to establish relationships and to build up a network of relevant contacts in his professional setting. In collaborating with colleagues and stakeholders, the professional has the ability to exchange knowledge and experience as well as to establish new contacts in a target oriented way. The professional is aware of his/her role in different context and knows feasible approaches to establish new contacts, taking into consideration the working contexts and roles of other stakeholders. He has internalised his/her own goals and recognises opportunities to promote these towards others.

### **G7: Managing diversity**

Description: The learning professional is competent in dealing with the heterogeneity and diversity in the historical, social, economic, religious background, learning needs, motivations, prior experience and knowledge, learning history, (learning) abilities, learning styles, age and gender of the learners and to understand their stages of development. This includes understanding of the value of diversity, respect for differences and the ability to incorporate or obviate any differences in the learning process. The professional shows empathy, is reliable, authentic and is loyal to the learners. Furthermore, the professional has the ability to analyse behaviour of learners and the group, the ability to identify possible problems and conflicts and to act strategically to prevent and/or manage possible conflicts and anger towards individual learners, the group and the professional him/herself. The learning professional is responsible for creating a safe learning environment which is based on mutual respect and cooperation in which the learners can develop into, or as, fully autonomous lifelong learners.

### **G8: Intercultural communication**

The learning professional is competent in interacting with others involved in professional practice with different cultural backgrounds, is able to establish a relation of trust and respect. Competence in communicating with other learners, colleagues and stakeholders

## **3.5. Quality in European KA1 offers**

The Erasmus+ Key Action 1 (KA1) offers international opportunities for individual learning mobility and professional development of educational staff. The programme offers grants to education and training organisations to send their staff to job shadowing, conferences or training courses abroad.

The international character of this KA1 programme makes it difficult for all parties to find each other. How can a sending organisation find appropriate quality courses? How can course organisers reach out to their target groups?

REVEAL has developed a suite of online tools and services to facilitate the visibility and quality of the continuing professional development (CPD) opportunities for adult educators within the KA1 programme.

REVEAL offers a KA1 platform which is called PROVIDE. It provides communication and matching opportunities between the three players in the system: the sending organisation, the individual participant (staff) and the CPD (training) provider in order to improve the match between demand and offer. The sending organisations (KA1 grant holders) are looking for CPD opportunities answering their needs and fitting their European development plan. The CPD organisers create an offer, related to their mission and expertise. The participants want to improve their competences and apply what they learned in their profession at home. PROVIDE brings the three parties together.

PROVIDE is NOT just a 'course data base' but offers publishing opportunities for the CPD providers as well as a 'needs filter' for the sending organisations. The publication form for the providers sees to it



that there is clarity in the description of the offer, specially in terms of content, didactic approach and learning outcomes. The sending organisations can check their development needs.

## 4 Valorisation Strategy

### Valorisation Strategy

Valorisation is a strategy to disseminate the results of projects<sup>5</sup>. It is aiming at transferring, disseminating and exploiting project deliverables and outputs in order to optimise their value and enhance their impact.

#### Output Levels

The outputs can be clustered in

- Project deliverables from the stock-taking phase
- Central products that form the “kernel” of the project outputs and
- Envisaged valorisation outputs (exploited and disseminated project outputs).

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<sup>5</sup> Originally a French term, the concept of valorisation is now widely accepted by the European vocational training community. “Valorisation” can be described as the process of disseminating and exploiting projects outcomes with a view to optimising their value, enhancing their impact and integrating them into training systems and practices at local/national as well as on European level.  
([http://europa.eu.int/comm/education/programmes/leonardo/new/valorisation/doc/planval\\_en.pdf](http://europa.eu.int/comm/education/programmes/leonardo/new/valorisation/doc/planval_en.pdf)).

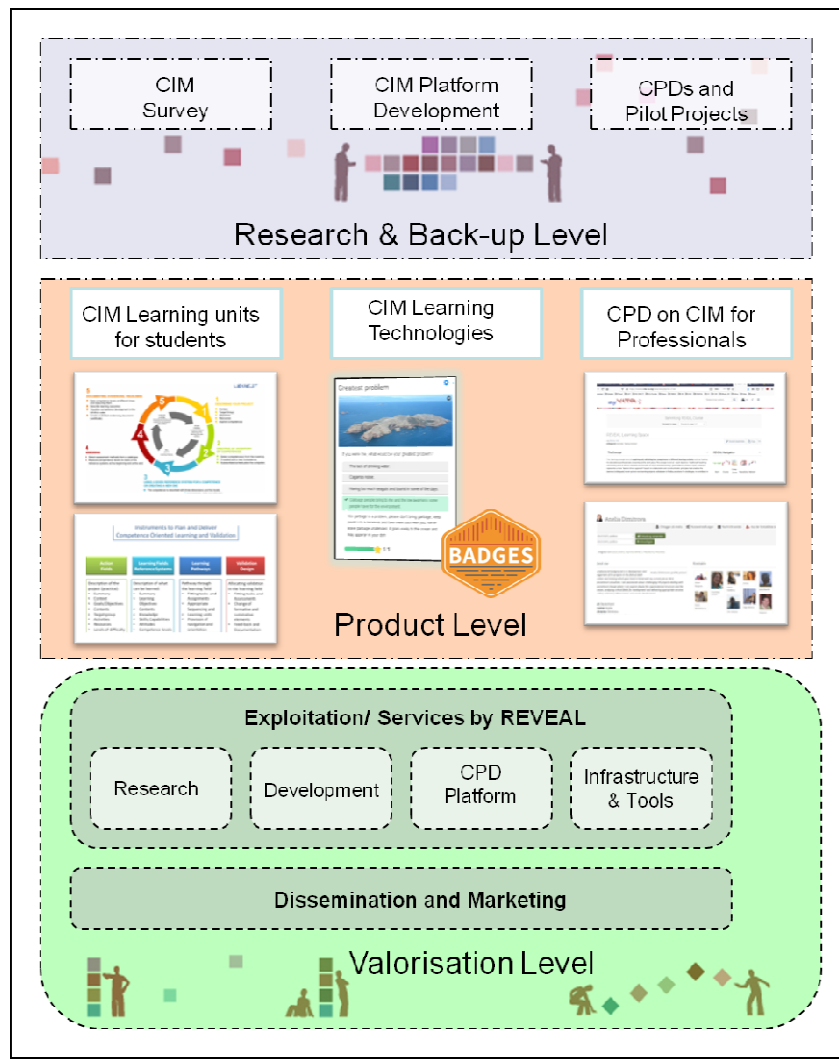


Figure 1: CIM Valorisation chart

The comprehensive validation system to assess and evidence learning outcomes (in European projects and partnerships) in combination with the continuing professional development approach is the *kernel* of the CIM-project (the core product).

It consists of three elements:

- A standardised validation procedure with description and pre-formatted instruments, based on the LEVEL5 approach,
- A holistic learning system, the CIM learning system for students and persons in motilities and internships
- An open learning space provided on CIM e-Portfolio system.

The first project phase the activities in WPs 2, 3 and 4 have contributed to the development of the approach, its instrument and its marketing and dissemination:

- Definitions and explanations on validation, CIM competences and their acquisition and promotion in the different educational sectors and available IT based approaches



- Development of the validation system based on LEVEL5
- Development of a perfected version of a seamless OER learning suite for the professionalisation of educational professionals in HE and business
- Development and delivery of an open learning environment and competence oriented learning approaches, a training course and the piloting

Valorisation is a strategic concept to achieve a high impact of projects.

In CIM the valorisation bundles the activities of:

- Exploitation outcomes and products through services rendered by the project partners (and beyond):
  - Counselling,
  - Training,
  - Validation and
- Development of and participation in new practice-science projects basing on the CIM approach, as well as
- Dissemination and marketing of products and procedures.

Before turning to the valorisation activities carried out in the framework of CIM, the main products shall be described from a user-oriented valorisation view.

CIM is embedded in the activities of the European REVEAL network which will be thoroughly described in valorisation components and reports document.

The central element of CIM in the framework of REVEAL is the approach to evidence learning outcomes and the development of professional competences for educators relating to Creativity and Innovation. Thus, the valorisation (exploitation) is focused on this central outcome. The value proposition for potential customers but also for CIM partners as suppliers is intrinsically tied to this key product.

## 4.1. Stocktaking Level

### 4.1.1. CIM in HEI and Business

In the initial phase of the project, the aim of the consortium was to examine the state of play in higher education and business in relation to the areas of creativity and innovation. Analysis and exchange in this phase were important to get a comprehensive overview of the different approaches to innovation in business and academia and to create an appropriate content framework in which acquisition and validation of these competences would take place.

The research conducted in IO1 consisted of the desk research, the online questionnaire, and interviews. In the first phase of the stocktaking a research framework was established by UDE.

The needs analysis, which was carried out by each partner country based on an intensive literature review (desk research). It showed that Creativity and Innovation is perceived as a very important aspect in all countries, but approaches for fostering related competences, as well as validating them differ between countries, and even within countries. The same applies to digital learning; it is used in



some way in all countries, but to different extents. The use has been increasing, especially the use of LMS, but most of the time those are not used up to their full potential. All countries make efforts, but also see room for improvement in educational offers for creativity and innovation, specific approaches of competence development in the field and their validation, as well as in the use of digital learning. The countries range from quite undeveloped to very progressive in the different aspects.

The online questionnaire was developed by the WP leader (UDE) in a constant loop of feedback with all partners. All partners were responsible for the distribution of the online questionnaire. The online questionnaire was answered by 423 respondents. The findings of the survey show and confirm what has been stated in the project proposal already; people do see the need for creativity and innovation competence development, and the benefits it has for different areas of peoples' lives, as well as the importance of the validation of these competences. The practice, however, seems to not have reached that level yet. Many respondents stated that certain tools and approaches are used, but it seems like there is a variety of different ways and no uniform approach, which would be desirable to be able to provide transparency and comparability of learning outcomes of informal and non-formal learning. Also, not many people seem to know the EntreComp framework, which if this changed could contribute to also increasing validation practices of creativity and innovation related competences.

Interviews and Focus group interviews were carried out with 37 and 27 experts from all partner countries on creativity and innovation from higher education and businesses.

Current biggest learning needs identified were interdisciplinary study approaches, the introduction of modern high-quality (blended) teaching and learning approaches, including lateral thinking skills, the need of experiences and activities within lectures and practical learning spaces, in which students can engage themselves.

The approach provided by the CIM project and the related Instructional interventions were perceived as very important from all respondents, especially specific modules relating to Design Thinking, joint real-life projects and entrepreneurship/innovation programs together with associated companies and institutions.

All participants report that there has been hardly any validation approach in place to assess creativity and innovation (competences), hence there is no transparency to identify competences and experiences of a candidate relating to CIM-competences.

#### Conclusion

The stocktaking carried out in the first project phase clearly substantiated the main R&D challenge and the hypotheses in regard to teaching, training, learning and validation in regard to Creativity and Innovation Management. There is a high demand of new approaches which strengthen the holistic, practice-oriented teaching and learning approaches in HE to promote CIM competences, that are considered substantial for economic growth and also social cohesion.

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### 4.1.2. The Core Approach: Facilitating DBCL

If we want to create a “European Continuing Professional Development Culture” it seems meaningful to bridge the sector specific boundaries, because they are no discrete categories anyway.

Consequently we should open our educational CPD programmes not only to other educational stakeholders but open it to all persons who are involved in personal and professional development, since we strongly believe that learning happens everywhere.

Our vision is a high quality approach for a large range of stakeholders working in informal, non-formal and formal contexts, creating and developing competences of their learners.





We have developed and substantiated quality driven approaches, methods and tools to support new ways of learning and development and to measure its impact, also aided by state-of-the-art learning technologies.

We call our approach Facilitation of Design Based Collaborative Learning.

It is a counter-concept to a subject oriented, formalised and de-contextualised education. However, it is not an erratic, laissez-faire approach but is based on a specific taxonomy, the LEVEL5 system. Especially in informal learning contexts outside the educational institutes - in real life- it is important to validate the competences. Especially in these rather informal contexts we have to go for quality and create demand driven, practical and meaningful learning environments.

However, the approach is grounded on a sound scientifically developed concept of Competence Oriented Learning and Validation, comes with high quality reference systems based on the LEVEL5 taxonomy and is backed up by a large number (>50) pilot learning projects

## 4.2. The Product and Service Level

Facilitation of Design Based Collaborative Learning is the basis for our joint network and for the services which are provided by REVEAL network.

DBCL in combination with a Continuing Professional Development approach is the *kernel* of the CIM project (the core product).

It consists of the following elements:

- A standardised procedure with description of planning, delivery and validation including and pre-formatted instruments, based on the LEVEL5 approach,
- A holistic CPD system for professionals (based on a sound competence framework)
- An open learning space to roll out the CPD
- Open Educational Resources related to
  - State of the art learning technologies and
  - OER contents



### 4.2.1. The CIM Platform

Within the CIM project learning suite has been developed which connects:

- A joint development space for CIM facilitators
- A growing space for learning projects that can be set up by members of the community
- Access to a CPD space for COL&V within the REVEAL community
- Access to a CIM LMS based on moodle
- Access to other learning technology within the LEVEL5 network
  - Access to a learning app
  - Access to other learning technologies (mobile research tools)
- Personal e-Portfolios

### 4.2.2. Counselling and Training

As outlined above REVEAL is not aiming at “selling” its products but enabling other stakeholders to use the approaches, tools and instruments to improve the quality of their learning and training offers.

The following Exploitation activities can be differentiated:

- Dissemination activities:
  - Outlined in a specific dissemination report attached to this deliverable
- Exploitation outcomes and products through services rendered by the project partners (and beyond):
  - Counselling, Training and Validation,
  - Development of and participation in new practice-science projects, as well as
  - Customising and deploying of apps and provision of services and infrastructure (outlined below)

### 4.2.3. Provision of OER

REVEAL is also a community which offers Open Educational Resources to its members and within its projects. The idea is that REVEAL comes with high quality courses and contents that have been developed in its projects and provides useful and easy to use learning technologies.

Examples of contents:

- Courses and Learning Units
  - Intercultural Teamwork
  - Project Management
  - CPD for Adult Educators
  - CPD for COL&V in cultural heritage contexts
  - CPD for Sustainable Development
  - CPD for Service Rendering at the interface of Business and Academia
- Course concepts
  - Design Thinking



- Entrepreneurship Education
- COL&Validation in Schools
- 
- Mobile applications (provided under the “Mathetics” label)
  - Virtual exhibitions
  - Badging software
  - Exploration apps for cultural and environmental projects
  - Survey software
  - Questionnaire and competence profile software

### 4.3. The Network Level

The developers’ and validators’ community decided to protect the approach and the software “LEVEL5”.

REVEAL as network has become the organisational home of the REVEAL partners and the basis for an enlargement and dissemination and exploitation of the REVEAL approach to create and validate professional competences for educators.

The two brands were protected and introduced in the European register of trade-marks.

The central element of REVEAL is the LEVEL5 approach to evidence learning outcomes and the development of professional competences for educators. Thus, the valorisation (exploitation) is focused on this central outcome. The value proposition for potential customers but also for REVEAL partners as suppliers is intrinsically tied to this key product.

Hence Competence Oriented Learning and Validation (based on LEVEL5) is the basis for our joint network and for the services which are provided within the REVEAL community.

In this connection two brands have been developed both to

- mainstream the approach and
- to set up an organisational basis (umbrella organisation) for the present and future partners taking part in the community.

REVEAL is a European Network for Competence Oriented Learning and Validation

REVEAL is a transnational community of European experts and practitioners working in > 50 organisations from 27 European (member) states.

The community has developed a unique validation approach (“LEVEL5”) for informal and non-formal learning since 2005.

The approach has been piloted and applied in more than 200 learning projects and scientifically evaluated in the framework of two international PhD thesis.

It has been created to serve especially

- target groups that learn outside formal education contexts and
- their learning facilitators, be it VET, HE or adult learning providers, care organisations, grassroot projects and others.



### Rationale

“Informal learning is a natural accompaniment to everyday life. Unlike formal and non-formal learning, informal learning is not necessarily intentional learning, and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills.” European Commission (2000).

Informal and non-formal learning is not only delivered by main-stream educational providers. All kind of social organisations and self organised entities may also deal with “informal learning” – and may not even be aware of it.

Thus informal and non-formal learning is a rather ambivalent topic: On the one hand it is highly recognised by educational experts but on the other hand there is not much consciousness about the value in the field and – as consequence – there are relatively few and rather scattered approaches to give evidence of this important modality/way of learning.

This is the reason why “Validating of informal and non-formal learning” is currently one of the top priorities on the educational agenda of the European Commission.

However, there are major systematic obstacles to a validation of informal and non-formal learning since the uncountable variety of learning contexts; contents and the lack of specified learning objectives are limiting a standardised evaluation.

One should also keep in mind that the goals of educational administration and funding bodies in regard to a validation of informal and non-formal learning (->standards) do not necessarily match with those of the experts working in the field, e.g. in grass-root projects (->individualism).

These fundamental target conflicts have to be considered when evaluating “informal and non-formal learning” especially in order to secure that it may serve those target groups that are already disadvantaged in the formal education system.

### 4.3.1. Vision and Mission

REVEAL has been founded as transnational network of experts from research and practice to create substantial contributions to the “Validation of Non-Formal and Informal Learning”.

Against the background that especially the lifelong learning community should profit from these learning modalities we unite behind the following principles:

- Non-formal and informal learning should gain more attention in the European learning community
- It should be recognised on an individual and purely voluntary level
- It should reflect the living and learning contexts of the individuals
- It should ground on action research principles and include all stakeholders (experts from the field, the learners) in the evaluation process
- It should not only validate learning outcomes following an utilitarian approach, e.g. against the principle of employability; but should also recognise a free learning which is not directed to specific job-related competences.
- In the first place the validation of Informal Learning shall support the individual by highlighting the developed competences to raise motivation to learn in informal learning contexts.



- It shall also contribute to a recognition of good informal learning practice in terms of learning outcomes to motivate learning providers to increase their efforts to create good informal learning offers.
- Validation of Informal and Non-Formal Learning shall be seen in connection with the learning itself.
- In REVEAL the system is connected with a learning approaches for the LLL key competences at the interface between Higher Education and business

The REVEAL network is offering LEVEL5 to European Lifelong learners and LLL institutions. LEVEL5 is a system which support educational staff to plan and deliver competence-oriented learning and validation in non-formal and informal learning contexts.

It comes with a state-of-the-art software that facilitates the comprehensive documentation and visualisation of learners' competence developments in all kinds of learning arrangements.

The validation procedure is on the one hand standardised but enables at the same time informal (e.g. grass-root) projects to establish an individualised reference system for assessing and evidencing relevant competence of their beneficiaries in a process-orientated way.

It also allows the learning providers to evidence the impact of their work according to a standardised procedure while, at the same time, keeping up the specifications of their informal learning projects in their individual contexts.

In the 10<sup>th</sup> European REVEAL conference in September 2019 during the 15<sup>th</sup> year anniversary of the foundation of the LEVEL5 approach the community gave itself the following mission statement which is outlined in the so called REVEAL Memorandum.

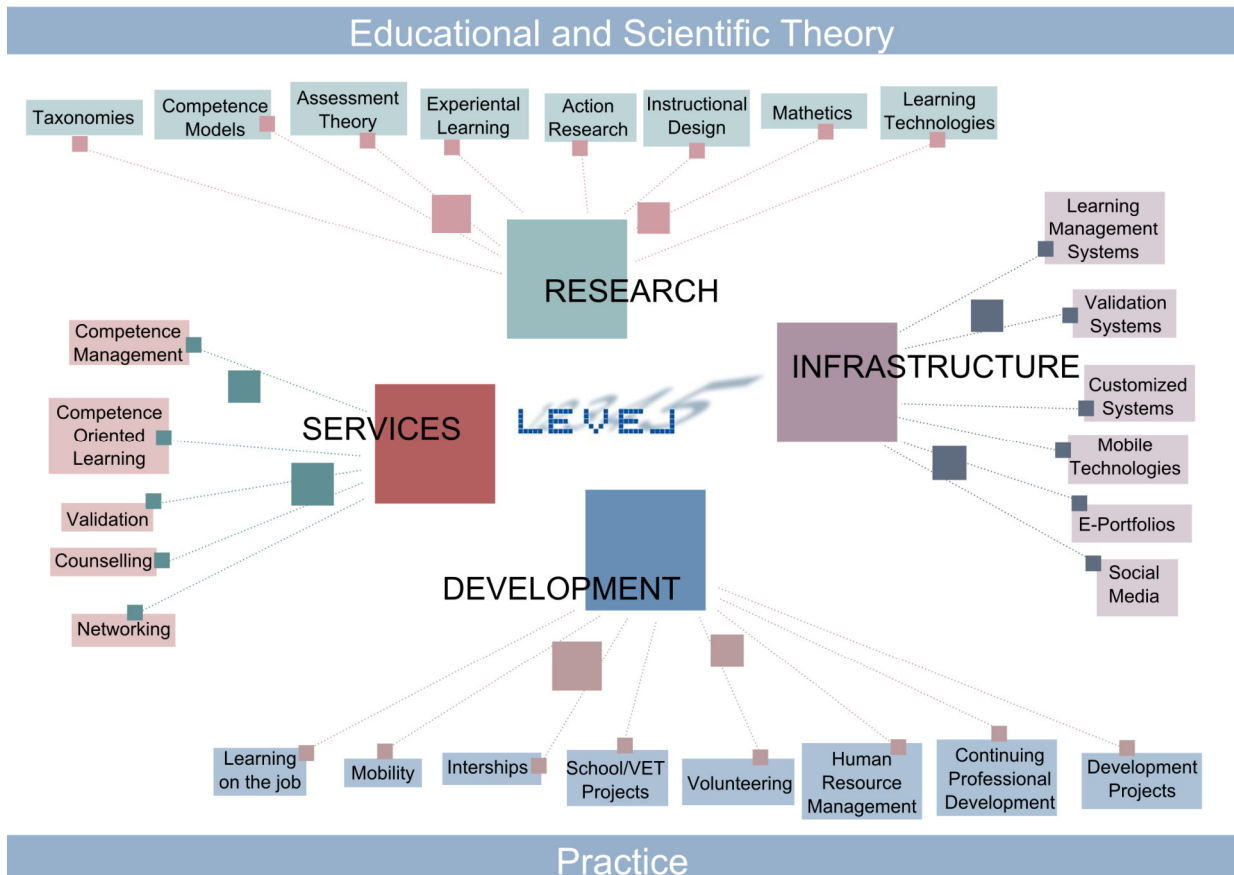


Fig. 2. The scope of LEVEL5 and REVEAL

Figure 2 visualises the 4 main elements of REVEAL. It can be read from top to bottom:

LEVEL5 is grounded on profound scientific approaches (top layer). It serves practical application in practice projects that REVEAL learning and competence developments in different non-formal and informal contexts (ground layer).

To achieve this LEVEL5 and the REVEAL network offer different kinds of services (counselling, validation, training etc.) and infrastructure (validation software, learning technologies, open learning spaces and e-Portfolios).

The manifesto describes these basic elements against the societal background and past and future developments of learning and education.

## Background

Our societies are at a rapid change.

The increasingly globalised and connected world has a big impact on our professional and personal lives.

Only few people remain in a single job, in one place, in one specified culture over their whole lifetime.

Digitalisation and globalisation, growing mobility, migration and demographic change induce change and become challenges that we have to tackle in work and private life.

How can we become “competent” to deal with these changes in future?



Formal education is probably not helping too much since in schools, universities and/or VET learners are mainly formally qualified, ie according to specific plans, curricula that do not respond to societal changes.

Hence formal education qualifies but does not necessarily make us “competent”.

So, what is “Being Competent”?

## Competences

To our understanding a competence is the ability to perform a mixture of

- Knowledge
- Skills and
- Attitudes

in a specific context and at a specific quality.

One becomes competent while dealing with tasks and challenges in real life.

Most educational experts agree that 80% of all learning happens in informal (practical) contexts that deal with practical solution finding and do not follow explicit learning objectives.

In this approach the term „competent“ means that a person is able to deal with certain challenges in a self-directed and rather independent way.

Of course knowledge and skills (abilities) play an important role in this competence definition; but additionally the values and emotions (the „affective“ part) have to be equally considered.

## Future of learning

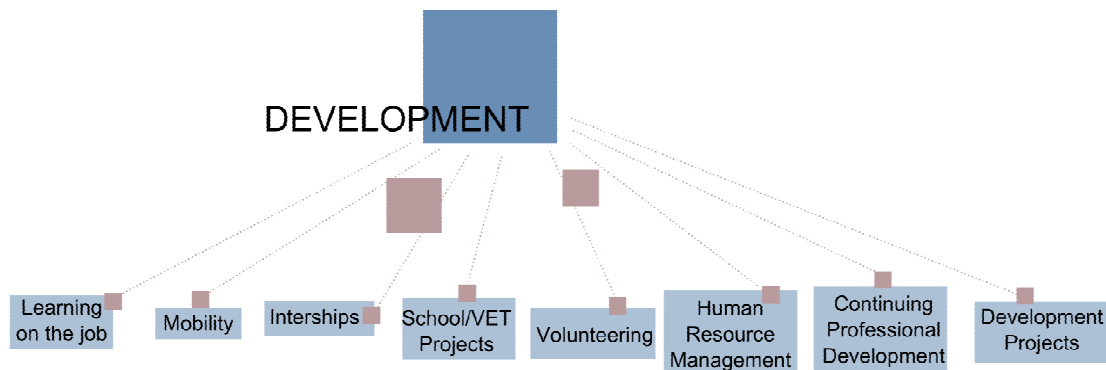
In future, therefore rapid, customised learning scenarios are becoming increasingly necessary, which are oriented on concrete action and to the skills required in practice - and less on curricula and static job descriptions.

For this reason, European experts from research and practice have developed the LEVEL5 system since 2005 – a system designed to plan and deliver "competence-oriented learning in practical, informal contexts and validate and visualise the competence developments therein.





### 4.3.2. Development



Since 2005, more than 2.000 people across Europe were trained in more than 200 learning projects, including:

1. Learning on the job
2. Human Resource Development
3. Volunteering
4. Internship
5. Schools
6. CSR Projects
7. Integration and
8. Inclusion
9. Mobility
10. ERASMUS
11. Regional Development
12. Continuing Professional Development for Educational Professionals

### Effects and Impact

From nearly 15 years of practical experience in using the LEVEL5 approach we know that:

Learning becomes more effective using LEVEL5 in the framework of a competence oriented learning approach because

- Learning becomes problem and real-life oriented
- Informal and non-formal learning and Continuing Professional Development can be tailor-made to the target groups
- It supports a contextualisation of individual context and the learners' needs into the learning programme
- Some Learners even become for the first time conscious about how competent they really are and what they know and are able to do



- Learning developments can be documented and visualised in an understandable way
- The LEVEL5 approach motivates people in different situations to continue to start and continue to learn.

### LEVEL5 Instruments

The kernel of the approach is the LEVEL5 cube as visualised model of competence development in specific contexts (e.g. real life situations in informal learning).

LEVEL5 is based on a three-dimensional model of competence, knowledge, skills and attitudes (values) represented dynamic in a 5-stage reference system.

As such it is suitable both for competency-based planning as well as for validation of skills - in particular those which can not be represented in the formal system.

### 4.3.3. Infrastructure

The infrastructure which is offered by and within the REVEAL group consists of Open Educational Resources that are combined and modified in user friendly and easily adapted ways.

They refer on the one hand to powerful “Learning Suites” which consist of Learning Management System in combination with an e-Portfolio and the LEVEL5 validation software. LEVEL5 learning suites support COL and V and are in use at 20 European Educational Institutes, mostly in universities.

Secondly the REVEAL group offers mobile apps to navigate learners in informal learning contexts outside institutional access, e.g. in mobility learning activities, learning at the workplace, internships, volunteering ERASMUS mobilities etc. The app is based on an OER LMS and can be easily filled with contents and interactive learning assignments.

Thirdly we have developed and offer in our community open source assessment and survey tools for educational and also research purposes.

Eventually we increasingly invest in the creation of “Matching platforms”. The PROVIDE platform is the first and most prominent example for these kind of platforms.

According to our philosophy we base our offers entirely on Open Source in order to benefit from a larger programmer community.

WE offer platform and cloud solutions entirely on European servers and support our UK partners with hosting their domains.

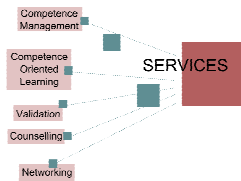
- LEVEL5 learning suite
  - Mahara
  - Moodle
  - LEVEL5
- Mathetics E-Portfolio<sup>6</sup>
- Matching platforms (PROVIDE-eu.org)
- Mobile learning app based on OER (moodle) including a Badging system

<sup>6</sup>, developed as my-vita.eu, updated within learningsuite.mathetics.eu and finalised from 2021 under level5.eu



- Mobile survey app based on OER (limesurvey)
- Assessment and questionnaire tools
- Server housing, maintenance, Cloud
- Domain hosting (for UK partners)

#### 4.3.4. Services

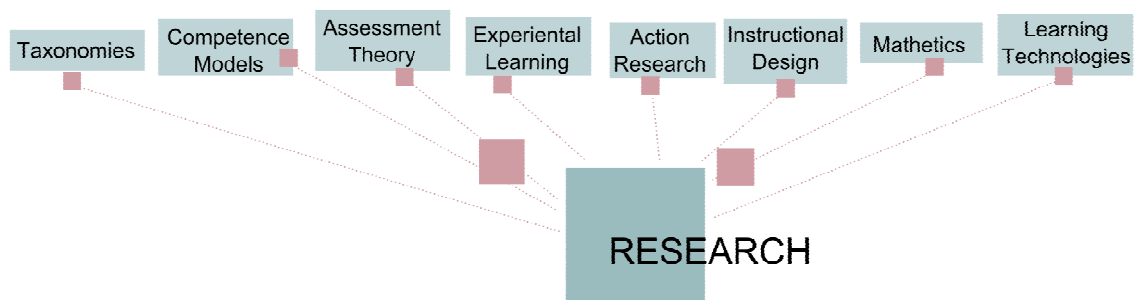


LEVEL5 and its infrastructure and services related to learning technologies are operated by a European network of experts working in research, development and practice. Our goal is to introduce competence-based learning in various aspects of society.

For this we offer:

- Validation of competences
- Planning, implementation and evaluation of competence oriented learning arrangements
- Implementation and customizing of learning technologies
- Introduction of competence management
  - We develop for your company a customized competence management system with a business competence catalogue, reference systems for mapping of competencies, skills development scenarios and assessment and validation concepts
  - We support you in the introduction and implementation of competence management, which can be integrated as an internal project in the company QM.
  - We connect LEVEL5 competency management tools with their existing learning environments
  - We are expanding operational training and informal learning offers to competency-based learning and validation elements
- R & D and project development
- Evaluations of projects

#### 4.3.5. Scientific Background



LEVEL5 and the tools and services based on and related to the state-of-the-art educational, psychological and neurobiological insights (e.g. Competence Theory (Erpenbeck) and Taxonomy



(Bloom, Anderson and derivatives), Instructional Design Models and Informal Learning Patterns (Flechsigt/Haller), Experiential Learning (Kolb)) and ground on universally recognised pedagogical principles and approaches (Comenius, Lewin, Pestalozzi).

Scientific research projects in educational sciences and learning technologies that have been carried out regularly since 2008 back-up the LEVEL5 5 approach.

Interfaces to other concepts and approaches

LEVEL5 and its instruments are compatible to the major European validation approaches and instruments such as EQF, ECVET and EUROPASS). They deliver additional value to those systems where these systems show weaknesses, e.g. in the validation of social, personal and Lifelong key learning competences or in not formalised learning projects or in learning on the job.

LEVEL5 can be easily connected to other instruments like ProfilPASS or Youthpass.



## 5 Networking and Community building

REVEAL has been providing a stable European wide structure for support of learners and learning facilitators be it teachers, trainers, helpers, counsellors, accompanying persons, assessors, evaluators etc.

In this connection it has created a European wide community of experts providing help and guidance for stakeholders in the field (e.g. citizens' communities, grass-root projects, Providers of extracurricular activities but also educational professionals from all educational sectors (HE, VET, AE, schools).

The composition of the REVEAL network reflects the idea of a mutual cooperation:

Executive members are being invited according to their specific expertise, to their area of work and to their geographical location. They take over commonly defined tasks in REVEAL.

Community partners may join the network on basis of their informal learning projects and use the services offered by REVEAL.

### 5.1. Organisational development

#### Organisational structure/departments

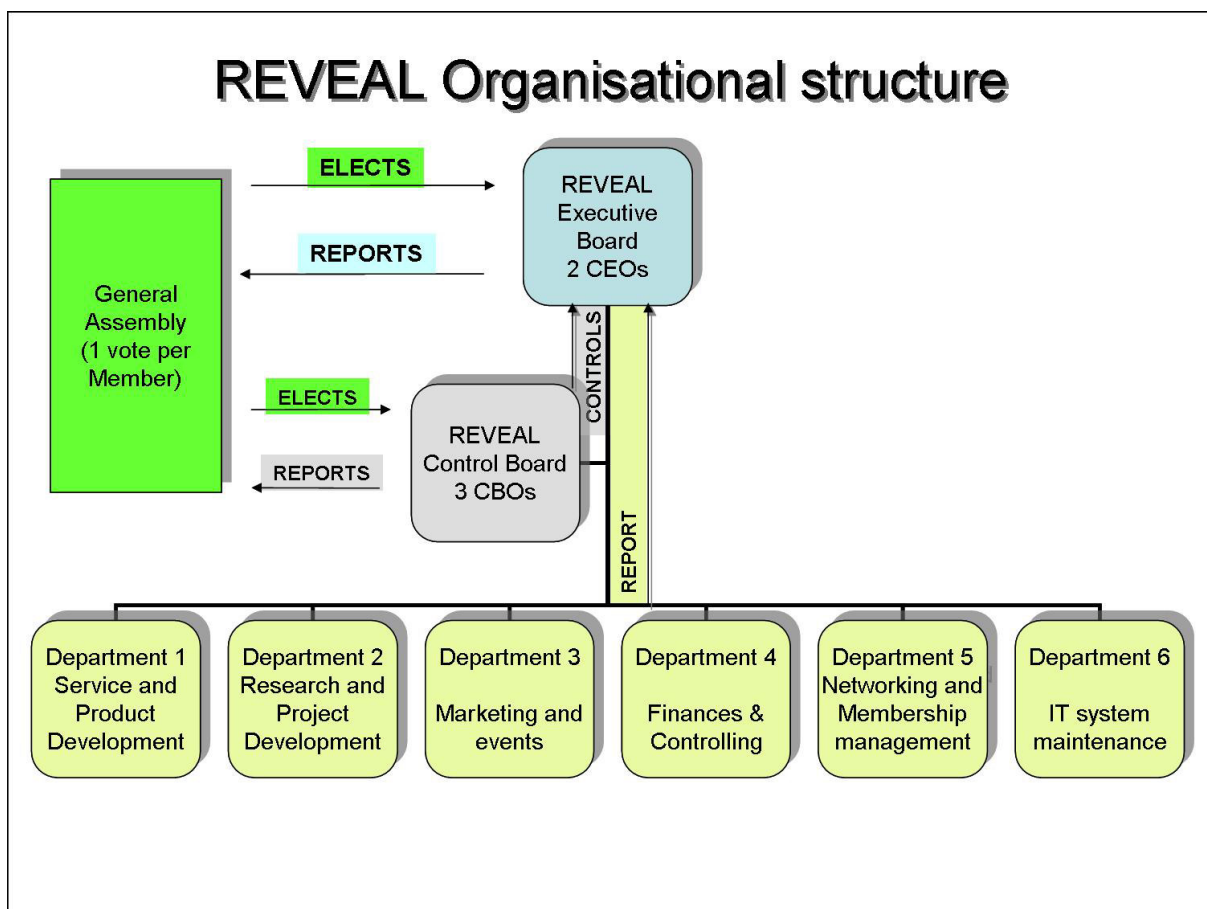


Fig. 3. Organisational structure



The structure reflects on the one hand the legal requirements given by German cooperative law and on the other hand the spirit of the joint European collaboration:

The ultimate decisive unit is the GA (General Assembly) in which each member has one vote. It elects both the Executive board (as operative organ) and the control board which controls the 2 CEOs of the executive board. The assembly will meet at least once in a year or, after invitation or apply by one member in more frequent times.

Specific tasks and vital network issues will be organised in so called departments, led by one REVEAL expert member. The vital areas identified so far are:

- Service and product development
- R&D
- Marketing and events
- Finances and Controlling
- Networking and Membership Management
- IT system and Maintenance.



## **5.2. Statutes of REVEAL**

REVEAL e.V. is a registered association by German law. Registered in the register of associations of the district court Göttingen.

The statutes were adopted at the general meeting 2018 in Göttingen.

### **§ 1 Name, seat, business year**

- (1) The association bears the name "REVEAL e.V."
- (2) It has its seat in Göttingen and is registered in the register of associations under the number VR 2302.
- (3) The business year is the calendar year.

### **§ 2 Objectives and Tasks of the Association**

- (1) The aim of the association is to
  - - the promotion of education, popular education and vocational training
  - - the promotion of development cooperation
- (2) The purpose of the statutes shall be achieved by promoting informal learning in European and international education and development projects.

The association achieves its goals in particular through:

- Promotion of international and European cooperation in sustainable development
- International Development Projects
- Regional development and capacity building projects for environmental and climate protection
- Promotion of educational projects
- Within the framework of international and European cooperations
- Promotion of competence-oriented learning and teaching in informal/non-formal learning contexts in school, vocational, higher education, adult education and youth.
- Promotion of blended learning and the use of learning technologies
- Promotion of further training of teaching staff

### **§ 3 Tax concessions**

- (1) The association pursues exclusively and directly non-profit and charitable purposes in the sense of the section "tax-privileged purposes" of the tax code.
- (2) The Association is selflessly active; it does not primarily pursue its own economic purposes.
- (3) The association's funds may only be used for purposes in accordance with the statutes. In their capacity as members, members shall not receive any benefits from the Association's funds. They do not have any claims on the association's assets when they leave the association. No person may be favoured by expenses which are alien to the purposes of the association or by disproportionately high remunerations.



#### **§ 4 Membership**

- (1) All natural and legal persons who support the objectives of the Association may become members.
- (2) Membership is acquired through a declaration of membership or acceptance by the executive board.
- (3) The resignation of a member takes place by written explanation opposite the executive committee (also by E-Mail) and is possible with a period of two months.
- (4) A member can be excluded by decision of the executive committee if it acts contrary to the association's goals or does not fulfil its obligations towards the association. The member can appeal against the decision to the general meeting. The general meeting makes the final decision. The member is to be invited to this meeting and to be heard.

#### **§ 5 Membership fees**

- (1) No membership fees shall be charged.

#### **§ 6 General Meeting**

- (1) The supreme organ is the general meeting. As a rule, it is chaired by the Chairman of the Executive Board.
- (2) The general meeting establishes the guidelines for the work of the association and decides questions of fundamental importance. The tasks of the general meeting include in particular:
  - a) Election and deselection of the executive committee
  - b) Election of the members of other committees, if necessary
  - (c) Advice on the progress and planning of the work
  - d) Approval of the economic and investment plan submitted by the Board of Directors
  - e) Resolution on the annual financial statements
  - f) Acceptance of the Annual Report of the Board of Management
  - g) Resolution on the ratification of the actions of the Management Board
  - h) Issue of a contribution regulation, which is not part of the statute
  - i) Resolution on the assumption of new tasks or the withdrawal from tasks on the part of the association
  - k) Resolution on changes to the statutes and the dissolution of the association.
- (3) The Chairman of the Executive Board shall invite the members to the General Meeting in writing (or by e-mail) at least two weeks in advance, stating the provisional agenda. It meets as often as necessary, as a rule once a year. Participation can also be via video conferencing.
- (4) Minutes shall be kept of the resolutions and, if necessary for the understanding of their realization, also of the essential course of the negotiation. It shall be signed by the chairman of the meeting and the minute-taker.



**§ 7 Board of Directors**

- (1) The executive committee consists of the chairman, the deputy chairman and the treasurer. They form the executive committee according to § 26 BGB (German Civil Code). The members of the executive committee work on an honorary basis, and travel expenses can be reimbursed.
- (2) The executive committee authorized to represent in the sense of §26 BGB consists of the first and second members.



### 5.3. IPR and Confidentiality

#### 5.3.1. Publication and Confidentiality Issues related to REVEAL partners

1	<p>Dissemination activities including but not restricted to publications and presentations shall be governed by subject to the following provisions.</p> <p>Prior notice of any planned publication shall be made 45 days before the publication. Any objection to the planned publication shall be made in accordance with the GA in writing to the Coordinator and to any Party concerned within 30 days after receipt of the notice. If no objection is made within the time limit stated above, the publication is permitted.</p>
2	<p>An objection is justified if</p> <p>(a) the objecting Party's legitimate academic or commercial interests are compromised by the publication; or</p> <p>(b) the protection of the objecting Party's Knowledge or Pre-existing know-how is adversely affected.</p> <p>The objection has to include a precise request for necessary modifications.</p>
3	<p>If an objection has been raised the involved Parties shall discuss how to overcome the justified grounds for the objection on a timely basis (for example by amendment to the planned publication and/or by protecting information before publication) and the objecting Party shall not unreasonably continue the opposition if appropriate actions are performed following the discussion.</p>
4	<p>Publication of another Party's Knowledge or Pre-existing know-how</p> <p>For the avoidance of doubt, a Party shall not publish Knowledge or Pre-existing know-how of another Party, even if such Knowledge or Pre-existing know-how is amalgamated with the Party's Knowledge, without the other Party's prior written approval. For the avoidance of doubt, the mere absence of an objection according to 6.3 is not considered as an approval.</p>
5	<p>Cooperation obligations</p> <p>The Parties undertake to cooperate to allow the timely submission, examination, publication and defence of any dissertation or thesis for a degree which includes their Knowledge or Pre-existing know-how. However, confidentiality and publication clauses have to be respected.</p>
6	<p>Use of names, logos or trademarks</p> <p>Nothing in this Memorandum shall be construed as conferring rights to use in advertising, publicity or otherwise the name of the Parties or any of their logos or trademarks without their prior written approval.</p> <p>All project public dissemination materials shall bear the logo of LEVEL5 and REVEAL and, if related to LLP projects, the acknowledgement of the Community support and the EU logo.</p>
6	<p>Use of the LEVEL5 approach and instruments</p>



If organisations or individuals use the LEVEL5 approach or its ventral instruments (inventory and reference systems) they are obliged to quote the REVEAL network and the LEVEL5 and link to the [reveal-eu.org](http://reveal-eu.org) website.

If the instruments are used in the VITA e-Portfolio the users are obliged to refer to the project and the website and link to the EU-funding.



### 5.3.2. Intellectual Property Rights

1 Joint ownership
<p>Each of the joint owners (REVEAL members) shall be entitled to Use their jointly owned knowledge on a basis of their services , and without requiring the prior consent of the other joint owner(s), and</p> <p>each of the joint owners shall be entitled to grant exclusive licenses to third parties, without any right to sub-license, subject to the following conditions: at least 45 days prior notice must be given to the other joint owner(s) who must declare if they agree; and fair and reasonable compensation must be REVEALd to the other joint owner(s).</p> <p>In case third parties use the LEVEL5 software, the labels or other brands or products in property of the REVEAL cooperative those parties are considered as clients who pay for the access to the software and the respective evidences on the basis agreed by the REVEAL members in the “LEVEL5 access fee regulation”.</p>
2 Transfer of Own Knowledge (foreground)
<p>2.1 Each Party may transfer ownership of its own Knowledge following the procedures of the Annex 2.</p> <p>2.2 It may identify specific third parties it intends to transfer the ownership of its Knowledge to. The other Members hereby waive their right to object to a transfer to listed third parties.</p> <p>2.3 The transferring Party shall, however, notify the other Parties of such transfer and shall ensure that the rights of the other Parties will not be affected by such transfer, especially when the LEVEL5 approach or a related instrument (3-dimeninsional, 5-level reference system) is used.</p>