Certi.MenTu
Certification of Mentors and Tutors

QUALITY MANAGEMENT HANDBOOK

CERTI·MENTU

Certification of Mentors and Tutors

2012

QUALITY MANAGEMENT HANDBOOK

Project LLP-LDV-TOI-12-AT-0015

Project coordinator:

Schulungszentrum Fohnsdorf

Partners:

University of Gothenburg

Municipality of Tjörns

MMC Management Centre Ltd

Instytut Technologii Eksploatacji – PIB

Dimitra Institute

Vocational Rehabilitation Consultants Ltd

DIMITRA I.T.D

Work Package: 2
Deliverable: 2

WP LEADER: DIMITRA I.T.D

INDEX

1. INTRODUCTION

The quality assurance plan of the Certi.MenTu project has developed to be an operational practical guide for project implementation and will facilitate evaluation of results by partners and coordinator.

The purpose of the quality assurance manual is to ensure the tasks, objectives and results that have been defined for the work packages of the project remain in line with Certi.MenTu's goal and are flexible enough to adjust to changing circumstances and requirements which could emerge during project implementation.

However, the aim is not just to have a close tool to measure feeling and fulfilment of the partners, but also to open debate and collect feedback from all partners involved who allow enriching the project itself, its processes and final products / results. So this plan and its questionnaires are defined as a participatory tool for all partners and final target of the project to contribute to improve project's development.

Proposed evaluation pursues to get the strength and improvement of trust and collaborative relationships among all partners in the proposal, what will drive the partnership to a shared diagnosis and common learning.

Present document describes the procedures and mechanisms the Certi.MenTu consortium partners will integrate to ensure the project will achieve its qualitative objectives with respect to the progress and results as well as it provides tools, procedures and criteria ensuring that the project will meet its operational goals within the timeframes indicated in the implementation plan while using the available resources.

2. CERTI.MENTU – PROJECT DESCRIPTION

The main objective of Certi.MenTu - Certification for Mentors and Tutors – is the development of a competency matrix for tutors and mentors, which is to provide the basis for elaborating the corresponding curriculum and for certification of non-formal and informal knowledge according to EN ISO 17024 - Certification of Persons. In compliance with the idea of innovation transfer, the results of the IWOLTE project, i.e. a learning model for tutors (vocational teachers) and mentors (supervisors), as well as the concept of multi-module training courses will be applied to new contexts and transferred to the partner organizations in UK, CY, PL, EL and SE. Special attention will be given to the development of a new transnational understanding of the roles of tutors and mentors, eliminating the current differences in conceptions. For these purposes, the project will build on the experience of previous projects (i.a. EOF - European Outplacement Framework & IWOLTE) as well as the relevant competences of the project partners. The competence profiles developed by the consortium will then be adapted to the EQF levels 5 or 6 in accordance with their respective definitions.

The following project objectives will be pursued:

− Common definition of the functions of tutors and mentors in the context of an active labour market policy

− Transfer and further development of a series of seminars (6 modules) for tutors and mentors, which will form the basis for certification exams

− Transfer of the certification process developed within the framework of the ISOQUAM project

− Introducing 2 modules for tutors and mentors as pilot projects in all partner countries

− Implementation of certification process

The experiences made in the course of the transfer and implementation of modules and the certification programme will be evaluated and form part of the project results.

The Certi.MenTu Project is aimed at developing a shared 'horizon of experience' for VET institutions and the economy in order to create deeper mutual understanding (as formulated in D.2.3. LEO-TraInno-7). Standardized certification on the basis of the European Standard EN ISO 17024 – Certification of Persons will provide an acknowledged process for validation and guarantee compliance with quality assurance requirements. The project will thus advance the integration of labour market requirements in vocational education and training.

A full list of the **Certi.MenTu** deliverables is provided at **Appendix 1**.

3. EVALUATION PROCESS

"Evaluation is defined as a selective, systematic and objective assessment of project including the design, implementation of actions and final products" Evaluation EU Activities, 2004

The Quality and Evaluation Cycle

Evaluation is a key requirement of all European-funded projects and programmes as it is important to capture and assess the innovative elements of the activities to inform dissemination, including examples of best practice, successful pilot actions, and lessons learned.
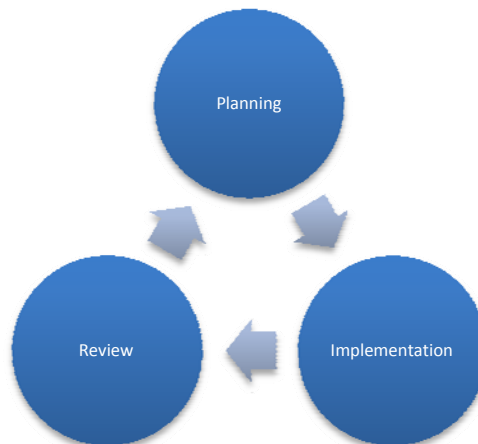
Evaluation supports quality assurance and is a key component of the Quality Assurance Plan (QAP) in that it:

❖ Acts as a check on whether the targets have been met;

❖ Allows the results to be improved based upon judgements made about the value and quality of the project;

❖ Gives opportunity for feedback, reflection and therefore continuous improvement, during the lifetime of the project;

❖ Simplifies decision-making and can assist with fundamental changes in the project, should these be necessary.

DIMITRA will conduct the evaluation by undertaking formal reviews at **two key reporting points** (progress and final), to support the quality assurance of the project. We intend to conduct the "internal evaluation" by capturing achievements / examples of good practice as well as highlighting any lessons learned or areas of concern.

The primary audience for the 'internal/formative evaluation' is the **Certi.MenTu** partners in order to inform project management, dissemination/exploitation and the requirements of the project. The performance of the consortium will therefore be assessed by the extent to which it collectively delivers its outcomes and therefore meets the project objectives. The evaluation processes adopt a mixture of the following methodologies in support of this peer review approach:

◆ By contributing to a participative agenda for the partnership meetings and facilitating discussion with reference to project progress and the key issues that are arising;

◆ Review and analysis of the **Certi.MenTu** partnership's monitoring documentation including minutes, and project progress ;

◆ Analysis of qualitative feedback from trainers, key stakeholders and partners engaged by the **Certi.MenTu** partners via evaluation processes embedded into partner work programmes and delivery.

For the *Interim quality report*, DIMITRA will draft a partner questionnaire for agreement with the promoter of the project (SZF) following the adoption of this QAP. The questionnaire concern partners and will be aligned to the reporting requirements of the **Certi.MenTu** Interim Report. It will be circulated in the period July – September 2013 and the results will be presented to the **Certi.MenTu** Partnership meeting in October 2013 in Cyprus. The partnership will discuss the findings and the outcome of those discussions and jointly agree on the necessary measures for improvement where required. The final document will be written up to form the *Interim Evaluation Report* that is due to be done till the end of October 2013.

For the *final evaluation report* (year 2 of the project) DIMITRA will design and consult on the necessary materials to support evaluation activity, including a partner questionnaire and the participant / trainer feedback results/report on the elaboration

of the pilot trainings. The evaluation tools for the pilots will be circulated to the partnership in the period November 2013 – August 2014 and the results will also be outlined and discussed at the partnership meeting in September 2014 in Sweden. This will help to ensure that all partners are carrying out consistent and comparable evaluation activities.

The evidence base for both reports will come from a combination of data drawn from:

♦   Partner meetings and minutes

♦   Information from the Partnership meeting evaluation forms

♦   Project reporting and data

♦   Project deliverables

♦   Partner questionnaires (interim/final)

♦   Training and pilot sessions evaluation reports

The key Evaluation milestones of the QAP are summarized as follows:

QAP Milestone	Result	Process	Timeframe
Quality management handbook	QAP	Drafted by DIMITRA ITD	31/03/2013
		Agreed by Certi.MenTu Partners	31/05/2013
Data gathering for Interim quality Report	Findings from partners	Circulation and analysis of Partner Questionnaire / Partnership review	July 2013 – September 2013
Interim Evaluation	Interim quality report	Write up of Findings from Partners	15 September 2013
Tools for stakeholder evaluation	Agreed format for questionnaire for training and workshops	Use of questionnaire and method to gather partner and stakeholder views	September – November 2013
Data gathering for Final Report	Findings from Partners and Stakeholders	Collection and analysis of data /Partnership review	July –September 2014
Final Evaluation	Final Evaluation Report	Write up of Findings for inclusion in Final Report	15 October 2014

A. OBJECTIVES

Overall the objectives of the Quality Assurance Plan are:

> a. Monitoring the project progress.

> b. Evaluate the quality of its results per single work package.

a. Monitoring the project progress

This task aims to monitor the entire project's progress as well as each work package according to the operational work plan timetable, in order to provide the management board and work package leaders with relevant information for the management control and specific monitoring.

Monitoring of the progress will be conducted on the basis of indicators on the below table:

Quality criteria/indicators for monitoring the project progress

Effective coordination
(provide practical information referred to throughout the project's life, clarify matters arising for project implementation, provide guidance on the methods of project monitoring and on the dissemination and exploitation of the project results/products, provide guidance on how to handle the financial side of project in such a way that financial statements can be readily drawn up, encourage smooth relations between the parties involved by setting out an operational framework for the project)

Efficiency of communications
(quantity, completeness and timeliness of the communications that arrive from the partner, Sharing and internal climate: trust, sharing of problems and tolerance)

Project's achievements as to planned timetable *(evaluation of the implementation)*

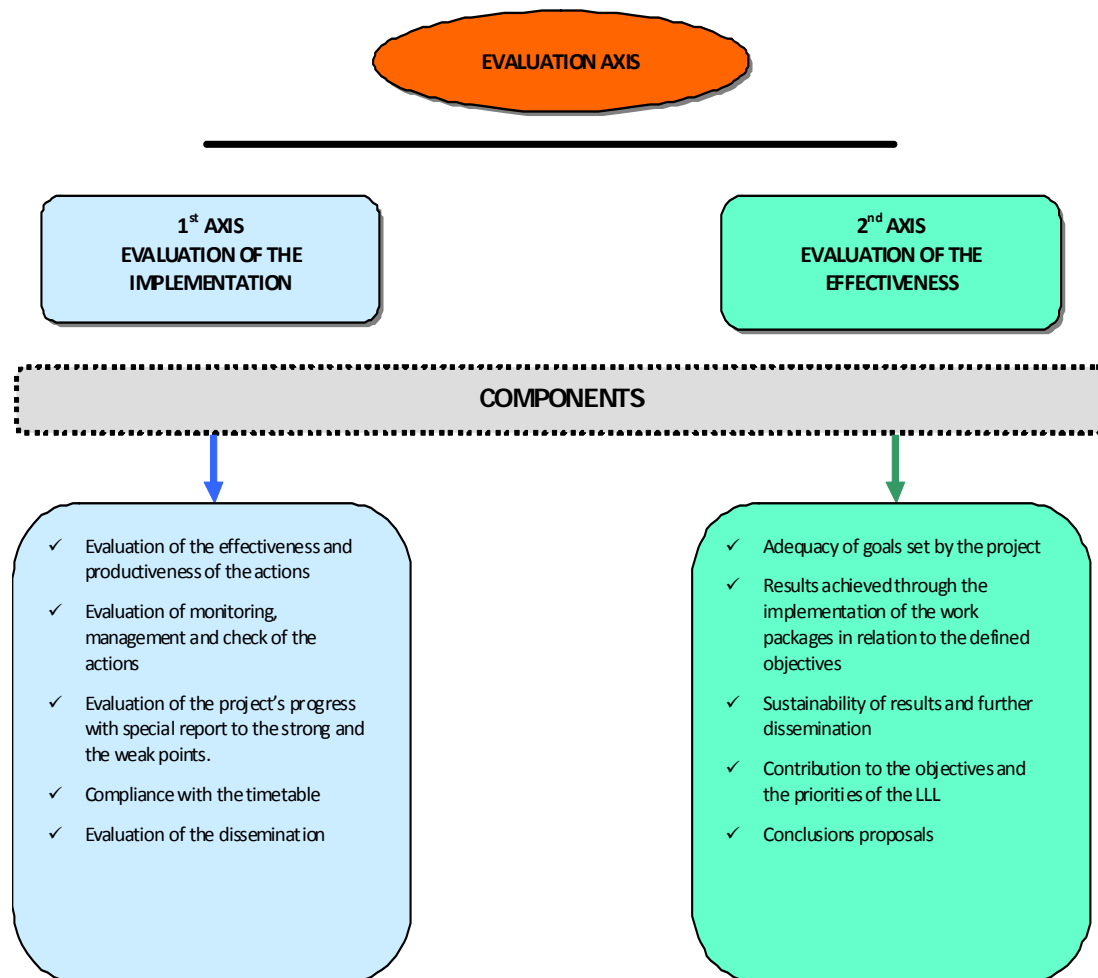**Project's achievements as to planned outputs and results** *(evaluation of the effectiveness*

Monitoring the project progress will be done in the mid-term year and at the final of the project. The indicators will be measured when collecting the information in order to write down the interim evaluation report and the final evaluation report.

b. Evaluation of the quality of project results

Evaluation **supports quality assurance** (is a key component of the QAP) in that it:

- ✓ Acts as a check on whether the targets have been met;

- ✓ Allows the results to be improved based upon judgements made about the value and quality of the project;

- ✓ Gives opportunity for feedback, reflection and therefore continuous improvement, during the lifetime of the project;

- ✓ Simplifies decision-making and can assist with fundamental changes in the project, should these be necessary.

The following figure shows the components of the two evaluation axes (evaluation of the implementation and evaluation of the effectiveness).

EVALUATION AXIS

| 1st AXIS EVALUATION OF THE IMPLEMENTATION | 2nd AXIS EVALUATION OF THE EFFECTIVENESS |

COMPONENTS

- ✓ Evaluation of the effectiveness and productiveness of the actions
- ✓ Evaluation of monitoring, management and check of the actions
- ✓ Evaluation of the project's progress with special report to the strong and the weak points.
- ✓ Compliance with the timetable
- ✓ Evaluation of the dissemination

- ✓ Adequacy of goals set by the project
- ✓ Results achieved through the implementation of the work packages in relation to the defined objectives
- ✓ Sustainability of results and further dissemination
- ✓ Contribution to the objectives and the priorities of the LLL
- ✓ Conclusions proposals

The evaluation of the quality of the projects results will be based on partner's assumptions.

The evaluation of the project results consists on the following three parts.

a) Safeguard the quality of products.

All the partners must read and agree on a final product before it becomes public.

Evaluation will be conducted on the basis of following indicators:

- Format: such as authors name, history of reviews, abstract, orthographically and grammatically correctness.
- Content, such as clearness, in line with the 'project description', profundity, completeness.

b) General evaluation of the quality of results.

The general evaluation of the quality of the project results will be evaluated in the questionnaires for interim and final report and the results will be reflected on these reports.

c) Evaluation of the project's key events.

There are some important activities within the Certi.MenTu project which will have its own evaluation after its implementation. These activities are the ones can be seen in the following chart:

Transnational meetings
Pilot trainings

Transnational meetings

Project will be developed by a network of different organizations, as it is in all European projects. To assure soft running of the project it is necessary to create a good partnership where exchange and communication among partners is done in an easy and periodical way, trying to avoid misunderstanding and further problems. The aim of this part of the evaluation is to measure all transnational meetings. In order to do that, a questionnaire (see evaluation tools section) will be passed to all participants at the end of the meeting. The questionnaire will collect information regarding the organization of the meeting, the communication, the topics discussed, the tasks achieved as well as the proposed tasks for the future.

The evaluation of the transnational meeting also aims to detect possible problems in time –if that's the case- and find common solutions.

Pilot testing – testing procedures

The testing phase is an important activity of the project and must be evaluated separately. The methodology that is going to be applied in this activity will be agreed in advance among the partnership.

The testing phase is going to be defined under the work package 7 "Piloting of the modules" and work package 8 "Implementation and validation of the certification".

Each partner will report to the coordinator regarding the results of the pilot testing

The evaluation will be based on:

- ❖ Evaluation by the involved stakeholders (trainers and trainees)

After the evaluation the products of the project will be finalised.

The evaluation of the testing procedures will be defined by Dimitra ITD, the leader of internal evaluation together with the leader of mentioned work packages in advance of the elaboration period of the pilot testing.

B. EVALUATION STAGES

Two (2) evaluation stages will take place during the project:

1. Intermediary evaluation

At the mid of the project **(15 September 2013)** with all information collected previously (circulation and analysis of partner questionnaire / Partnership review, June-August 2013), a midterm report will be written and shared with all partners to check whether the project has been implemented according to project aim and objectives, if any improvements are required and what's the feelings of the year gone and expectations for the year to come, of the partners.

This report will focus on detecting possible problems, possible solutions of the problems and how to avoid these problems during the second year of the project.

2. Final evaluation

It will be done at the end of the project **(15 October 2014)** and will concentrate mainly in results and products in a wide sense (those derivate from the partnership exchanges and also from activities carried out in each country involved) apart from analyzing whether all aims have been achieved.

Final report will be written after the project's end and while all partners are preparing final justification, to be able to analyze everything once it has been closed.

4. EVALUATION PRODUCTS

1. Quality Assurance Plan

This evaluation product is the present document. A manual that reflects the process must be followed in order to evaluate the development of the whole project, its activities and the partnership.

2. Evaluation questionnaires for main stakeholders and participants

A set of questionnaires for internal evaluation of activities / results by main stakeholders. These questionnaires will provide feedbacks and constructive comment of main involved parts regarding the relevance and effectiveness of the Certification for Mentors and Tutors procedure.

3. Reports

Two (2) internal reports:

- Interim report and
- final report

on evaluation of the project (deliverables coordination and effectiveness of consortium)

5. EVALUATION TOOLS

1. Questionnaires for transnational meetings

Lifelong Learning Programme

LEONARDO DA VINCI: Transfer of Innovation

Certi.MenTu project: "CERTIFICATION OF MENTORS AND TUTORS"

*Project number: **2012-1AT1-LEO05-06970***

Evaluation questionnaire

Date & place

Evaluation Questionnaire

Name:

Organisation:

Country:

Date:

Please answer the following questions by placing a √

	☺				☹
1. Were you satisfied with the preparation work for this meeting (communication, information flow etc.)?	5	4	3	2	1

	☺				☹
2. What were your main hopes and expectations for the work meeting and to what extent were these expectations met?	5	4	3	2	1

	☺				☹
3. To what extend the agenda reflected the issues discussed during the meeting?	5	4	3	2	1

	☺				☹
4. To what extend you are satisfied with the depth of the discussion on the issues of the agenda?	5	4	3	2	1

5.	Is there any additional subject you would like to be included in the agenda and wasn't discussed?

6. Were you satisfied with the working atmosphere during the meeting? Did everybody had opportunity and chance to contribute properly and equally to this project meeting? Was everybody's opinion heard and respected?	☺				☹
	5	4	3	2	1

7. Do you think the meeting was generally successful? Do you think the project group was able to achieve relevant results and to gain some progress in its work?	☺				☹
	5	4	3	2	1

8.	Strong points - What did you enjoy most during the work meeting?

9. **Weak points - Was there any part of the meeting that you would like to change?**
10. Do you have any suggestions for the future meetings?

If you would like to add and/or change any questions on this questionnaire for the future evaluation of meetings please make your comments here

_____

_____

_____

_____

_____

_____

_____

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE!

2. Monitoring of the project progress and the quality of project results.

In order to give feedback to the project management and work package leaders, we would like to ask the partners to fill in the following questionnaire twice. We will gather their inputs anonymously and provide them with a consolidated overview after analysing them. Please see below a draft questionnaire the final form of which will be decided according to project progress accordingly before send.

QUESTIONNAIRE

In the questions below, which contain the scoring scale 0-5, please provide quantitative feedback as follows:

1 = poor
2 = unsatisfactory
3 = fair / satisfactory
4 = good
5 = very good/outstanding

1. Performance of the CERTI.MenTu Consortium

1.1. W.P-1 How effective is the working methods adopted by the Partnership for the successful realization of *CERTI.MenTu*?

	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Comments (please include specific reference to the operation of Partnership Meetings; the Activity Plan; To do lists):

1.2. W.P-1 How high is the respective knowledge and competences of the Partners of this consortium in terms of complementary to the benefit of the project?

| | 1 ☐ | 2 ☐ | 3 ☐ | 4 ☐ | 5 ☐ |

Comments (please highlight any particular strengths and weaknesses):

1.3. W.P-1 How efficient were the resources that have been allocated to you in *CERTI.MenTu* compared with the demands of the Work Programme?

| | 1 ☐ | 2 ☐ | 3 ☐ | 4 ☐ | 5 ☐ |

Comments:

2. Monitoring the achievement of the project outcomes against the project workplan

2.1. W.P-1 How effective has the Partnership been in terms of meeting the *CERTI.MenTu* Project Work Plan so far?

| | 1 ☐ | 2 ☐ | 3 ☐ | 4 ☐ | 5 ☐ |

Comments (please highlight any particular strengths and weaknesses):

2.2. W.P-4 Regarding the *research* in partners' *National report about mentors and tutors sector – challenges and trend*: How useful do you think this has been to informing the subsequent development of the *CERTI.MenTu* project?

| | 1 ☐ | 2 ☐ | 3 ☐ | 4 ☐ | 5 ☐ |

Comments:

2.3. W.P 5 - Regarding the "Transfer of the modules and training courses according to the IWOLTE approach": **How useful have you found the process of developing *a unit according to the template*?**

	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Comments:

3. The Quality of the Outcomes

3.1. W.P-2 How would you assess the use of the *"Quality Management handbook"*?

| | 1 ☐ | 2 ☐ | 3 ☐ | 4 ☐ | 5 ☐ |

Comments:

3.2. W.P-3 Regarding dissemination purposes how effective do you think are / will be the *CERTI.MenTu*

(a) Brochure

(b) Newsletters and,

(c) Project Website to supporting the dissemination of the project?

| | 1 ☐ | 2 ☐ | 3 ☐ | 4 ☐ | 5 ☐ |

Comments:

3.3. **W.P-3** How effective are / will be the *CERTI.MenTu* dissemination strategy?

	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Comments:

3.4. **W.P-3** How effective are / will be the *CERTI.MenTu* the exploitation strategy to supporting the dissemination of the project?

	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Comments:

3.5. W.P-4 *Producing the European competence matrix "tutor":*

    (a) How would you assess this activity in terms of quality and results?

    (b) Please comment what particular issues, if any, have you faced in relation to developing this material?

	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Comments:

3.6. W.P-4 *Producing the European competence matrix "mentor":*

    (a) How would you assess this activity in terms of quality and results?

    (b) Please comment what particular issues, if any, have you faced in relation to developing this material?

	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Comments:

3.7. W.P-4 *Producing the European report about the tutors and mentors:*

    (a) **How would you assess this activity in terms of quality and results?**

    (b) **Please comment what particular issues in terms of challenges and trends, have you faced in relation to developing this material?**

	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Comments:

3.8. Is there anything else you would like to comment upon?

Comments:

Thank you for completing this questionnaire!

APPENDIX 1 – CERTI.MENTU DELIVERABLES

The Certi.MenTu deliverables are:

	WP	No	Deliverables	Leader	Date	Language	Form
Project Management	1	1	Project website	**SZF**	30/11/2012	EL, EN, DE, PL, SV	WEB
		19	Progress report	**SZF**	30/09/2013	EN	Text file
		20	Final report	**SZF**	31/10/2014	EN	Text file
Quality Management and assurance	2	2	Quality Management Handbook	**DIMITRA**	30/11/2012	EN	Text file
		3	Interim quality report	**DIMITRA**	30/09/2013	EN	Text file
		4	Final quality report	**DIMITRA**	30/09/2014	EN	Text file
Dissemination and Exploitation	3	1	Project website	**Municipality Tjörn**	30/11/2012	EL, EN, DE, PL, SV	WEB
		5	Dissemination strategy	**Municipality Tjörn**	02/01/2013	EN	Text file
		6	Exploitation strategy	**Municipality Tjörn**	31/10/2013	EN	Text file
		7	Dissemination materials	**Municipality Tjörn**	31/03/2013	EL, EN, DE, PL, SV	Paper Brochure
Analysis and competence matrix	4	8	European competence matrix "mentor"	**MMC**	31/03/2013	EL, EN, DE, PL, SV	Text file

		9	European competence matrix "tutor"	**MMC**	31/01/2013	EL, EN, DE, PL, SV	Text file
		10	European report about the tutors and mentors sector – challenges and trends	**MMC**	31/01/2013	EN	Text file
Transfer of the modules and training courses according to the IWOLTE approach	5	21	Description of the 6 modules tutors/mentors	**University of Gothenburg**	30/06/2013	EL, EN, DE, PL, SV	Text file, WEB
		22	Marketing strategy	**University of Gothenburg**	30/06/2013	EL, EN, DE, PL, SV	Text file, WEB,
		23	Evaluation sheets for the pilot seminars	**University of Gothenburg**	30/06/2013	EL, EN, DE, PL, SV	Text file
		24	Final seminar programme	**University of Gothenburg**	30/06/2013	EL, EN, DE, PL, SV	WEB, Paper Brochures
Developing and adapting materials and documents for certification	6	11	Competence certification scheme "ISO 17024 certified mentor"	**VRC**	30/11/2013	EL, EN, DE, PL, SV	Text file
		12	Competence certification scheme "ISO 17024 certified mentor"	**VRC**	30/11/2013	EL, EN, DE, PL, SV	Text file
		13	Examination and certification material for mentors	**VRC**	30/11/2013	EL, EN, DE, PL, SV	WEB, Text file
		14	Examination and certification material for tutors	**VRC**	30/11/2013	EL, EN, DE, PL, SV	WEB, Text file
		15	ISO 17024:2003 certificate for mentor	**VRC**	30/11/2013	EL, EN, DE, PL, SV	WEB, Text file
		16	ISO 17024:2003 certificate for tutors	**VRC**	30/11/2013	**EL**, EN, DE, PL, SV	WEB, Text file
Piloting of the modules	7	25	Report of the pilot phase	**DIMITRA**	31/12/2013	EN	Text file

Implementation and validation of certification	8	17	6 pilot test beds	IteE	30/12/2013	**EL**, EN, DE, PL, SV	WEB, Text, Text file, Oral, WEB
Modification, finalization and validation of the modules and certification	9	11	Competence certification scheme "ISO 17024 certified mentor"	**SZF**	30/11/2013	**EL**, EN, DE, PL, SV	Text file
		12	Competence certification scheme "ISO 17024 certified mentor"	**SZF**	30/11/2013	EL, EN, DE, PL, SV	Text file
		13	Examination and certification material for mentors	**SZF**	30/11/2013	EL, EN, DE, PL, SV	WEB, Text file
		14	Examination and certification material for tutors	**SZF**	30/11/2013	EL, EN, DE, PL, SV	WEB, Text file
		15	ISO 17024:2003 certificate for mentor	**SZF**	30/11/2013	EL, EN, DE, PL, SV	WEB, Text file
		16	ISO 17024:2003 certificate for tutors	**SZF**	30/11/2013	EL, EN, DE, PL, SV	WEB, Text file
		18	Convergence strategy ISO and EQF	**SZF**	28/08/2014	EN	Text, Text file
		24	Final seminar programme	**SZF**	30/06/2013	EL, EN, DE, PL, SV	WEB, Paper Brochures