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The set of conclusions concerning the 4 subsequent stages of developing the competence
recognition and validation systems for the European Project Managers (PM) active in the adult learning Civil Society Organisations (CSO)

Preparation paper for the

The short-term joint staff training event

Structured Democratic Dialogue Co-laboratory

16th – 20th of May 2022

Paphos, CYPRUS

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1. Introduction

The conclusions were developed in the frames of the project "**Recommendations for international project managers competences recognition and validation for lifelong learning**", acronym: AER-V, co-financed by the Erasmus+ Programme of the European Union.

The main challenge the project addresses is little support available for recognition and validation of knowledge, skills and competences of international project managers active in Civil Society Organisations (CSOs) in the adult education sector, acquired through formal, non-formal and informal learning. The challenge was named during the realisation of the related project - "The first-time international projects managers support network".

The overall aim is to support recognition and validation of knowledge, skills and competences of international project managers active in Civil Society Organisations (CSOs) in the adult education sector, acquired through formal, non-formal and informal learning.

The direct target group of the project includes the members, workers, co-workers, educators and volunteers of the Third Sector adult education organisations (i.e. Civil Society Organisations, including informal groups, Non-governmental organisations and other non-profit organisations).

The project flow is based on **several transnational meetings aiming at good practices and experiences exchange**. The project also includes a short-term joint staff training event - Structured Democratic Dialogue Co-laboratory.

As a result there will be recommendations for international project managers competences recognition and validation for lifelong learning developed.

AER-V is **an element of a long-term strategic plan** of the project core partners, aiming at delivering sustainable support for international cooperation of the adult learning sector CSOs.

Period of realisation: December 2019 – October 2022.

Project partners:
Fundacja Alternatywnych Inicjatyw Edukacyjnych (PL), www.fundacjaaie.eu (Leader)
Cooperativa Sociale COOSS MARCHE ONLUS scpa (IT), http://www.cooss.it/it/
Interfolk, Institut for Civilsamfund (DK), www.interfolk.dk
EDUCULT - DENKEN UND HANDELN IN KULTUR UND BILDUNG (AT), www.educult.at
Rightchallenge - Associação (PT), www.rightchallenge.org
INSTITOUTO NEUROEPISTIMON KAI TECHNOLOGIAS KYPROU/ Future Worlds Centre (CY), www.futureworldscenter.org

2. Conclusions from the 1st Transnational Working Meeting: General review of the existing competence recognition and validation systems, applicable for the adult learning CSOs in all Partner countries

Meeting dates: 28th and 29th of May, 2020
Venue/organiser: Online/organized by: COOSS
Meeting type: *Exchange of good practices in the field of adult education*

GENERAL RECOMMENDATIONS on Good Practices related existing solutions for recognition and validation of knowledge, skills and competences available for the adult learning CSOs

1. Prior learning
- different requirements according to level of certification we apply for;
- work experience in lifelong learning, or get it by job-shadowing, and/or as a partner has to be considered.

To avoid:
- much restrictive criteria of recruitment
- limiting the offer of the certification provider
- limiting the access for specific area of studies

2. Training offer
- wide offer with tailored courses on CSOs needs
- provision of different level of certification is important
- low prices
- blended methodology: on-line/ in class training + some mentoring; some assignments supervised, etc.
- clear target of beneficiaries
- mixture of different approaches: workshops, lectures, discussions, project development)
- possibility of financing: possibility to pay for the course from a project grant (i.e. Erasmus+ mobility applications to get grants for trainees)
- certified trainers will be and added value

To avoid:
- Too expensive courses
- To not well defined skills for each level

3. Examination
- different aspect have to be examined according to level of certification
- *basic level*: more technical, written examination (multiple / closed questions, knowledge of simple procedures, use of management tools – i.e. how to fill in a budget form, a Gantt, etc.)1st level: training, written exam (multiple choice, closed question)
- *advanced level(s)*: more experiencing examination, proofs from work experience, case study, etc.
- a certification should be offered, by each levels

To avoid:

- an examination solution including only an online or distant examination methodology

4. Continuing certification:

- it is important to have a continuing certification
- quantitative aspects have to be evaluated for renewal: proof of involvement in international projects (time-oriented)
- possibility to attend workshops, courses to certificate skills
- after 2/3 years

To avoid:

- high fees for the renewal

3. Conclusions from the 2nd Transnational Working Meeting: Training offer for acquiring/upgrading competences, preceding the recognition and validation process

Meeting dates: 6th and 7th of September, 2021
Venue/organiser: Vienna, Austria/organized by: EDUCULT
Meeting type: *Exchange of good practices in the field of adult education*

LIST of RECOMMENDATIONS/CONCLUSIONS on Good Practices related to a <u>training offer</u> for acquiring/upgrading competences, preceding the recognition and validation process (for ex. the exam) – the 'certification' as a specialist in a certain field:

Based on practices insights the AER-V consortium discovered new challenges and needs in the field of certification and validation of the job role "international project management" and developed new recommendations tackling that:

- We decided to precise our definition of international project management: We will use in future **European project management in the CSO sector of adult education** since actors of this field is our target groups
- Recognizing of work experiences is difficult due to different job roles/experiences → We need a **flexible but standardized validation system**
- A validation should be flexible, attractive for employees and organisations → We need a system that answers to **markets demands**
- Flexibility and attraction can be built up through **micro-certification and different job roles**
- **A more level system is not appropriate** due to the blurring boundaries of job descriptions in CSOs
- **Collaborations with organisations/experts in the fields of certification**, validation and further training can **raise the reputation and expert knowledge as well as facilitate the entry**
- Only one validation provider cannot have the claim to provide the validation and certification system, the further training opportunities and the examination → **diversification of our offer and cooperation is necessary**
- The need in the European CSO sector is not only to have recognition and validation system in terms of European project management but to be able to perceive further trainings → **the exam preparation courses should be designed like a training opportunity**
- Based on these needs, challenges and recommendations designed an initial draft how to structure a recognition and validation system for **European project management in the CSO sector of adult education**

<u>Main Category: First structuring according to three job roles</u>

- o 1: PM for national coordination of European project

      ○ 2: PM for coordination of a whole European project
      ○ 3: Trainer/mentor/supervisor for EU PMs

<u>Middle Category: Second structuring according to content-related modules</u> (Communication, Financing, Soft skills, Strategy, Technical, CSO, Sustainability, etc.)

<u>Micro Category: Assignment of necessary units/competences to the respective modules</u>

➔ Certification is possible at all three levels with varying degrees of effort:
- Certification in a job role: Here, all necessary units/competences, which are still being defined, must be completed from different modules).
- Certification in a module: Here, all competences/units assigned to this module must be completed.
- Assigned to this module must be completed.
- Micro-certification: It is also possible to complete a certification and thus a targeted further training on a competence/unit.

➔ Further training courses for all competences/units should be made available.

4. Conclusions from the 3rd Transnational Working Meeting: Requirements for continuing/maintaining the 'Project Manager' (PM) certification and validation of competences

Meeting dates: 22nd and 23rd of November, 2021
Venue/organiser: Porto, Portugal/organized by: Rightchallenge
Meeting type: *Exchange of good practices in the field of adult education*

Final Recommendations concerning maintaining the certification:

Some difficulties encountered:

- Difficulty in defining skills and competences – defining the concept of competence: it implies to encompass knowledge, skills and attitude/awareness and that is not always easy in their definition.
- Difficulty assigning competence /skill level to the job role. It is very complicated to assertively assign the competences to each job role.

Agreeing points:

- Merging some skills to create a compact and comprehensive module with 6 competences for each leg.
- Merging skills and assigning them to each leg of the triangle module.
- That will be the basis of agreeing certification to continue to the renewal of certification.
- Competence and skill oriented – focus of all homework brought in by participants
- All levels in the assessment system - from beginner to expert to proficient.

- **The agreed methodology is the three-leg module/ PMC triangle.** Each one of the axes (units/ modules) of the PMC triangle refers to one of the previously agreed units: Technical Competences, Leadership Competences and Strategic and Business Management Competences. Each is agreed to have 6 competences, comprising one or more skills, some of them are merged for a more compact and comprehensive module.

- **Give focus to the certification through training – micro certification system - possible to transform training units in training modules.** The numbers are to 6 in each leg by merging some of the units, so we can get a simpler certification unit model, with 3 legs x 6 units, like 18 units. The Micro-certification of each unit in the certification frame will be less comprehensive and complicated.

- **Suggested addition of a new job role: Project designer / applicant /fundraiser (PM for preparing project applications)**. The success rate of EU applications may be approx. 15 – 25 pct depending on the program, so the first main threshold for being engaged in European projects is to provide successful applications in a very competitive environment.

5. Conclusions from the 4th Transnational Working Meeting: The examination system for the certification and validation of competences (including micro certification)

Meeting dates: 23rd and 24th of March, 2022
Venue/organiser: Copenhagen, Denmark/organized by: Interfolk
Meeting type: *Exchange of good practices in the field of adult education*

Final recommendations for the certification frame, including the 4 job roles and the qualification levels:

The PMC Triangle	Job roles			
Technical competences, Leadership competences, and Strategic & business competences	Partner & national coordinator	Project developer & designer	Project coordinator & manager	Mentor
	Competence levels	Competence levels	Competence levels	Competence levels

1. Technical skills - 6 units	1. Technical skills - 6 units			
1 English language competences i.e. competences of reading, writing and speaking English as the common foreign language in European cooperation, incl. knowledge of and ability to properly apply the terminology related to adult education/lifelong learning, to the civil society organisations context and the European projects' calls and management.	x Competent	x Proficient	x Competent	x Proficient
2 Planning and designing the project i.e. An ability to: design and express a project idea in a structured manner answering clearly named needs; choose a proper co-funding programme; find, chose and engage co-applicants; plan and agree with co-applicants on the disposition of the key project tasks and responsibilities, according to the involved partners expertise, concluded in designing and submitting a project application to a specific call for proposals.		x Proficient	x Competent	x Proficient
3 Project scheduling, budgeting & financial management i.e. Ability to: plan the break down structure of the work programme according to clearly defined goals set as SMART (Specific / Measurable / Achievable / Realistic / Timely defined); plan the key activities and outputs; estimate the time needed for implementing each task; estimate and assign relevant costs for each task and output; designing the corresponding budget structure in a way making it available to monitor the execution of the budget; manage the budget spending, accounting, internal control and financial reporting in accordance with the project plan.	x Competent	x Proficient	x Proficient	x Proficient
4 Coordinating the teamwork and internal communication i.e. Ability to: put the workplan into practice by creating task lists, nominating responsibilities, supervising the execution of tasks with clear procedures for oversight, time management and needed flexibility; plan and implement an effective, assertive and motivating communication with the project team that defines What, Why, Who, Where, When and How, incl. mastering appropriate the ICT tools.	x Basic	x Competent	x Proficient	x Proficient
5 Dissemination strategy planning and realising i.e. Ability to plan, revise/update if needed, and execute the dissemination strategy in accordance with the clearly named beneficiaries/target groups and stakeholders, including defining the specific messages, tools and channels to effectively reach them with information, incl. appropriate use of the social media.	x Competent	x Proficient	x Proficient	x Proficient
6 Evaluation strategy planning and realising i.e. Ability to plan, conduct and report progress and accuracy of reaching the project goals, defining evaluation methodology including both process evaluation, impact evaluation and sustainability of the project results, incl. procedures of designing online evaluation tools.	x Basic	x Proficient	x Proficient	x Proficient
	5	6	6	6

The PMC Triangle			
Technical competences, Leadership competences, and Strategic & business competences			

Job roles			
Partner & national coordinator	Project developer & designer	Project coordinator & manager	Mentor
Competence levels	Competence levels	Competence levels	Competence levels

2. Leadership competences - 6 units			

2. Leadership competences - 6 units			
x	x	x	x
Competent	Competent	Proficient	Proficient
x		x	x
Competent		Proficient	Proficient
x		x	x
Competent		Proficient	Proficient
x	x	x	x
Competent	Competent	Proficient	Proficient
x	x	x	x
Competent	Competent	Proficient	Proficient
		x	x
		Proficient	Proficient
5	3	6	6

Left column units:

1. **Communication in the international CSO context,**
i.e. the ability to communicate the project vision and meaning of the activities to stakeholders in a international civil society context, including intercultural competences.

2. **Motivation and Influencing,**
i.e. to have the needed empathy to understand and motivate the project team and key stakeholders with clear goals and empower them to put their mark on the work, which reinforces the cohesion and co-ownership.

3. **Improvisation and agility,**
i.e. to be able to act agile when needed and to improvise in unforeseen situations to ensure progress and effect by following new openings, possibilities and the flow of the context.

4. **Team building and delegating of project tasks,**
i.e. to coordinate the teamwork with clear values and goals and promotion of ownership that can strengthen the mutual responsibility and makes it easier to delegate the varied tasks to the team.

5. **Moderating and organising meetings and idea workshops**
i.e. to have the ability to moderate virtual, hybrid and life meetings, and to organise idea workshops with brainstorming or brain-writing with the aim to qualify the project idea or to design solutions to unforeseen problems.

6. **Peer-to-peer counselling and conflict resolution**
i.e. to provide counselling and advice on a peer-to-peer level in a cross-border and multilateral context, including to mediate in challenging situations and secure conflict resolutions.

Erasmus+

The PMC Triangle
Technical competences, Leadership competences, and Strategic & business competences

Job roles			
Partner & national coordinator	Project developer & designer	Project coordinator & manager	Mentor
Competence levels	Competence levels	Competence levels	Competence levels

3. Strategic and Business Management competences - 6 units	

3. Strategic and Business Management competences - 6 units			

	3. Strategic and Business Management competences - 6 units	Partner & national coordinator	Project developer & designer	Project coordinator & manager	Mentor
1	**Acting in CSO environment providing adult education** i.e. knowledge of the mission, needs, challenges, conditions, legal situation and history of the CSO sector of non-formal and informal adult education in your own country; ability to act in a CSO environment.	x basic	x Proficient	x Competent	x Proficient
2	**International and multilateral networking in the CSO field** i.e. knowledge about the European CSO sector; ability to develop a strong European network in the CSO sector and to find and select appropriate new partners as well as to promote your own organisation as a future partner; ability to create synergies between international and national projects.	x basic	x Competent	x Competent	x Proficient
3	**Applying for European funding programmes** i.e. knowledge about the relevant funding programmes and an insight in the specific demands these programmes have for the project plan and the specific application design; ability to apply to the programmes.	x basic	x Proficient	x Competent	x Proficient
4	**Needs analysis and risk management** i.e. to know how to analyse the needs for the project idea and to meet the needs and to involve the key stakeholders, to clarify the strengths, weaknesses, opportunities and threats of the project and manage the risks.		x Proficient	x Proficient	x Proficient
5	**Legal and regulatory compliance** i.e. to ensure that the project complies with relevant European laws, policies, and regulation as well as that the tools for communication of the project are applied within the legal framework.	x basic	x Proficient	x Proficient	x Proficient
		4	5	5	5