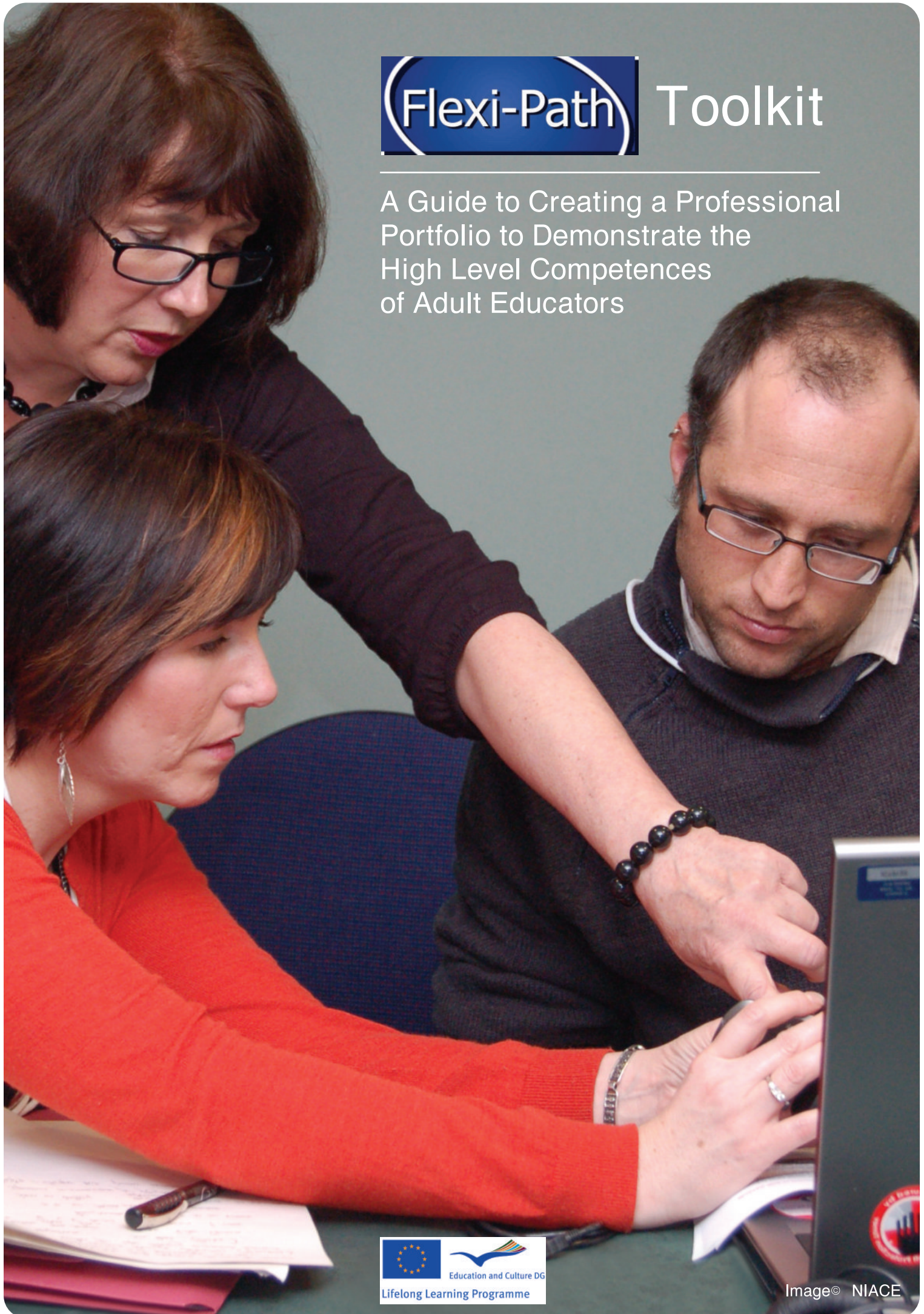




Toolkit

A Guide to Creating a Professional Portfolio to Demonstrate the High Level Competences of Adult Educators



What Adult Educators say about the Flexi-Path Toolkit:

- > Very clear, well thought through and a welcome, much needed asset for the sector.
- > Very interesting as a means of selfevaluation and also an instrument of professional development within organisations.
- > Can guide professionals in both documenting their career and validating their competences.
- > Has the capacity of raising more awareness of the importance of competences gained in non-formal environments.
- > A good opportunity to reflect on own personal competences and to realise one's own potential.

I personally feel that this toolkit can help me keep a record of my personal and professional development at work.

Enables you to re-focus on what the job is really about.

Every senior manager should have a copy.



Image© NIACE



This project is funded from the Lifelong Learning Programme



A Collaborative Project led by DiE Germany
www.flexi-path.eu



Schweizerischer Verband für Weiterbildung
Fédération suisse pour la formation continue
Federazione Svizzera per la formazione continua
Swiss Federation for Adult Learning



Università degli Studi di Firenze



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Project

Flexible Professionalisation Pathways for Adult Educator between the 6th and 7th Level of EQF (Flexi-Path)

Project number

DE/08/LLP-LdV/TOI/147187

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Related projects and websites

EMAE – ‘European Master in Adult Education’ (2004-2007) www.ema-network.org

VINEPAC - ‘Validation of Informal and Non-Formal Psycho-Pedagogical Competencies of Adult Educators’ (2006-08) www.vinepac.eu

Q-ACT - ‘Qualifying Actors in Adult and Continuing Education’ (2007) www.q-act-conference.de

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Foreword

On behalf of the European Association for the Education of Adults I am pleased to introduce this Toolkit. It addresses a pressing issue in our field of work where for too long the high levels of skills of our advanced practitioners have gone unnoticed and been undervalued. The support of the European Commission for this initiative is most welcome and I have no doubt that this outcome of the Flexi-Path project will create a benchmark for future developments in the recognition of competences arising from informal adult learning.

Gina Ebner, Secretary General, EAEA



Preface

Recognizing Leadership in Adult Learning A new approach to demonstrating high level competences and increasing job opportunities within Europe

The **FLEXI-PATH** project was undertaken on the basis that in the Adult Education field across Europe, there are many professionals with competences and functions that are of the highest levels of the EQF. It was recognised however that the training itineraries are very different, and until now the training and professionalization systems of the sector haven't allowed the wider recognition and comparability of qualifications in. Agencies have the challenge of recognizing the learning and the competences of these professionals, who in turn have limited opportunities to acquire jobs and training opportunities.

The aims of the Project were to:

- Analyse the system or the present qualification frameworks for professionals in adult education in the different European countries
- Illustrate the complex high level skills and knowledge of adult education practitioners
- Contribute to the comparability and transparency of the adult educator qualifications in order to facilitate
 - the access and progression in careers
 - mobility on the European Labour market.
- Design a common competency profile of an adult educator on the 7th EQF level
- Develop a validation instrument of learning and competences that meets this level.

Transfer of Innovation:

The project was based on three previous European projects: the most recent of which was VINEPAC – Validation of informal and non-formal psycho-pedagogical competencies of adult educators (2006-08)

The present publication is the culmination of this 2 year project.

The Authors: The present document was prepared by:-

Bernard Godding, Trish Kreft and Karen Read; Educational Centres Association

On behalf of the Flexi-Path Team

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A large, stylized letter 'A' in a dark blue color, set against a lighter blue background. The 'A' is composed of two main vertical strokes and a horizontal crossbar, with a triangular cutout in the center. The overall design is clean and modern.

The Flexi-Path Approach

1. Introduction
2. How To Use Flexi-Path To Build A Personal Portfolio
3. The Competency Framework
4. Career Pathways
5. Obtaining Support And Guidance
6. Flexi-Path In Context - A Management Perspective

1. Introduction

The principles and values behind Flexi-Path

Flexi-Path recognises that there are individuals employed in the Adult Education and related sectors who have built their professional reputations through work experience rather than academic study.

Flexi-Path offers a transparent process to advance the mobility of Adult Educators in Europe in line with Europe 2020 and draws on the measure that precede and inform the current strategy e.g. The Lisbon Strategy and realising the objectives of the Bologna Process.

What is Flexi-Path?

Flexi-Path is a process based on a toolkit which enables its users to demonstrate their high level work-based competences in the Adult Education field, rather than assessing their knowledge base or specific skills in isolation. It has been created and developed by Adult Education professionals throughout Europe to provide a standardised approach to reviewing the competences of an Adult Educator working at a high level within the sector and related occupational areas. It provides a step by step method for analysing complex professional situations in which competences have been (are) demonstrated.

The benefits of using Flexi-Path

A Flexi-Path portfolio will give your work experience validity and will indicate to your employer and potentially any future employer, the depth of your work experience and achievements in a way that presentation just of a CV or an interview alone may not successfully illustrate.

Flexi-Path has endorsement Europe-wide and may improve your employment prospects throughout Europe.

Flexi-Path is not an academic study programme; rather it may enable you to build a portfolio of your work achievements for submission to a Higher Education establishment for accreditation towards or endorsement of a Masters level qualification.

Flexi-Path facilitates professional development and sets a clear agenda for your Continuous Professional Development activities.

It has been suggested that, where members of a team work through the Flexi-Path process in parallel, it can help deployment of relevant skills to key areas and identify aspects that need strengthening.

² This would need to be independently negotiated

Who can use Flexi-Path?

Flexi-Path is aimed at adult educators with substantial experience and normally employed at a management/ leadership level, e.g. you may find Flexi-Path of value if you occupy (or aspire to) a position in an adult education context in a role such as:

You do not have to hold academic qualifications at any level to find this resource beneficial. Flexi-Path is concerned with the demonstration of your work-based abilities and successes. You may find the toolkit helpful if you are looking to develop yourself professionally, since it can identify those aspects of work experience that you need to focus on in your career.

Basic Skills Director
Director of Human Resources
Director of Resources
Director of Training
Funding Agency Director
Gallery/ Museum Education Officer
Head of Community Programmes
Head of Faculty

Head of Public Relations & Marketing
Head of Student Services
Health Education Unit Manager
Lead Assessor/ Quality Assurance
Learning Centre Manager
Learning Technologies Manager
Prison Education Manager
Strategic Development Team Leader

How Flexi-Path works

You will be guided through 3 clusters of competences and asked to consider whether you feel that you meet or are working towards meeting each competency at either a Level 6 or Level 7. Each competency statement will describe briefly the type of activities which may be indicative of your competency, based on your work experience. For each competency you may select evidence from your work which provides proof that you are operating at either Level 6 or Level 7. You will develop a portfolio of evidence which may be presented to a line manager and/ or adjudicator for assessment.

You may find that there are areas of competency that you are not able to evidence. However, clearly this may be because it is not part of your present remit and indeed may not currently be seen as relevant to your current career pathway, although of course that might change in the future.

The toolkit includes guidelines for planning developmental activities which will enable you to work towards acquiring additional competences. You will be encouraged to plan job shadowing activities or maybe negotiate with your line manager to undertake work outside the remit of your current role to enable you to gain experience in these areas at the appropriate level.

The Role of a Mentor

The overall approach taken in this toolkit is formative; that is to say it aims to assist the further professional development of its users. At various points we say, 'This may be worth discussing with your Mentor.' We see the identification of someone to fulfill this role as mainly being a personal one. However there are a few points to be borne in mind.

Think of a Mentor as a critical friend; you want them to be honest with you without diminishing you. Equally they need to be at least as expert in your field or a closely related one, as you are. We envisage that your Mentor will read through all of your statements concerning your competences and the evidence you put forward to support those statements and to come to an independent judgment on them.

To do that they will need to have become familiar with the EQF Level 6 & Level 7 competency criteria and be able to support any opinions they give with reference to those statements. Beyond that we hope that those who act as Mentors will be able to 'see you' in your present job and consider where you may be heading and how the present balance of your experience utilises and supports your current competences. Based on that, it is to be hoped that they would be able to suggest opportunities or activities that could extend and develop your competences.

In many instances it may make sense for you to establish a peer partnership with a colleague who is also following this professional development route.

Equally your line manager or a member of your organisation's board may be ideally placed to give you that kind of support and advice. This may have the advantage that they are encouraged to understand your performance in far greater detail than might otherwise be the case.

What are work-based competences?

Work-based competences are a reflection of a person's ability to undertake the main functions of their professional role. Competences will reflect a person's knowledge, skills and attitudes and may be demonstrated through practical application. Their nature differentiates them from underpinning knowledge that may be learnt through academic study.

The terms used

The Bologna Process

The Bologna Process was agreed in 1999 by all Education Ministers of the European Community. It seeks to harmonise all degree level qualifications of member states so that there is commonality of levels and comparability of standards. The Bologna Process aimed to see the creation of the Environment Higher Education Area (EHEA). The Budapest – Vienna Declaration officially launched EHEA in March 2010.

<http://www.ehea.info/>

European Qualification Framework EQF

The EQF is a common European reference framework which links countries' qualifications systems together, acting as a translation device to make qualifications more readable and understandable across different countries and systems in Europe. It has two principal aims: to promote citizens' mobility between countries and to facilitate their lifelong learning.

Each of the 8 EQF levels is defined by a set of descriptors indicating the learning outcomes relevant to qualifications at that level in any system of qualifications.

http://ec.europa.eu/dgs/education_culture/publ/pdf/eqf/broch_en.pdf

The Lisbon Strategy (2000-2010)

The Lisbon Strategy was agreed by European Heads of State in 2000. It states the social and economic goals of the community and sets these within the context of making Europe the most successful knowledge-based economy. In so doing it places educational activity at the heart of all wider programmes of member states and the Commission itself.

<http://ec.europa.eu/growthandjobs/>

Europe 2020

Europe 2020 is a plan for economic renewal, adopted in June 2010 and replaces The Lisbon Strategy. The strategy aims to create jobs, encourage 'green' economic growth and create an inclusive society. Proposals for 7 flagship initiatives include 'An Agenda for New Skills and Jobs' which aims to create conditions for modernising labour markets with a view to raising employment levels and ensuring the sustainability of social models that include the implementation of lifelong learning principles including flexible learning pathways. A European Skills, Competences and Occupations Framework (ESCO) is proposed with the aim of 'ensuring that the competences required to engage in further learning and the labour market are acquired and recognised through general, vocational, higher and adult educations and to develop a common language and operational tool for education/ training and work'.

http://ec.europa.eu/eu2020/index_en.htm

2. How To Use Flexi-Path To Build A Personal Portfolio

Introduction

The aim of the Flexi-Path structured approach is to allow you to work in a systematic way in selecting evidence of your competences. Thus we are not suggesting huge portfolios which are demanding to maintain and difficult to assess. Instead we provide a schedule of standard competences which we relate to EQF levels 6 & 7. These are graded in terms of their complexity and levels of impact within the organisational context. Using the Flexi-Path model (Fig 1) allows a systematic approach to consideration of all professional and functional areas normally covered by adult educators.

Stage 1: Appreciating the Competency Framework

This stage of the process is for you to familiarise yourself with the process and approaches and in particular to clarify in general terms where the EQF relates to your own field of activity and how levels separate between 6 and 7. At this stage it would also be useful for you to identify a Mentor. You will find in Part B that there are three competence clusters which analyse the key roles of adult educators who lead teams and develop learning opportunities. We suggest that you read these now as they will give you an overview of our approach and an indication of the kind of evidence we expect that you can find to place in a portfolio. You will need to return to this section later and work from it more systematically when you come to select and present material for your portfolio. It will help you to reference your evidence against relevant competence Statement(s).

Checklist

Stage 1:

- *Identify a mentor*
- *Read the competence clusters*

Stage 2: Personal overview and initial self assessment

You are encouraged to take the time for personal overview and consideration of what you hope to achieve by undertaking this exercise. In doing this you will determine where each area of the competences in the Flexi-Path document can be identified before being more thoroughly considered and noting the elements related to your personal experience. Then record your achievements and related thoughts Work Sheet A: Flexi-Path Initial Self Assessment Record. All work sheets may be found in Part C. The Self Assessment Record will guide you through each of the competence fields, allow you to record your personal assessment of competence in this field and record your ideas on how you might evidence the competence or what developmental action you may wish to consider. Overall this process may lead you to consider whether gaining endorsement of your current competences is your goal or whether you wish to use the Flexi-Path approach to extend your competences in certain fields.

Checklist

Stage 2:

- *Worksheet A in Part C*



To stage 3

Figure 1: **Building a Personal Flexi-Path Portfolio**

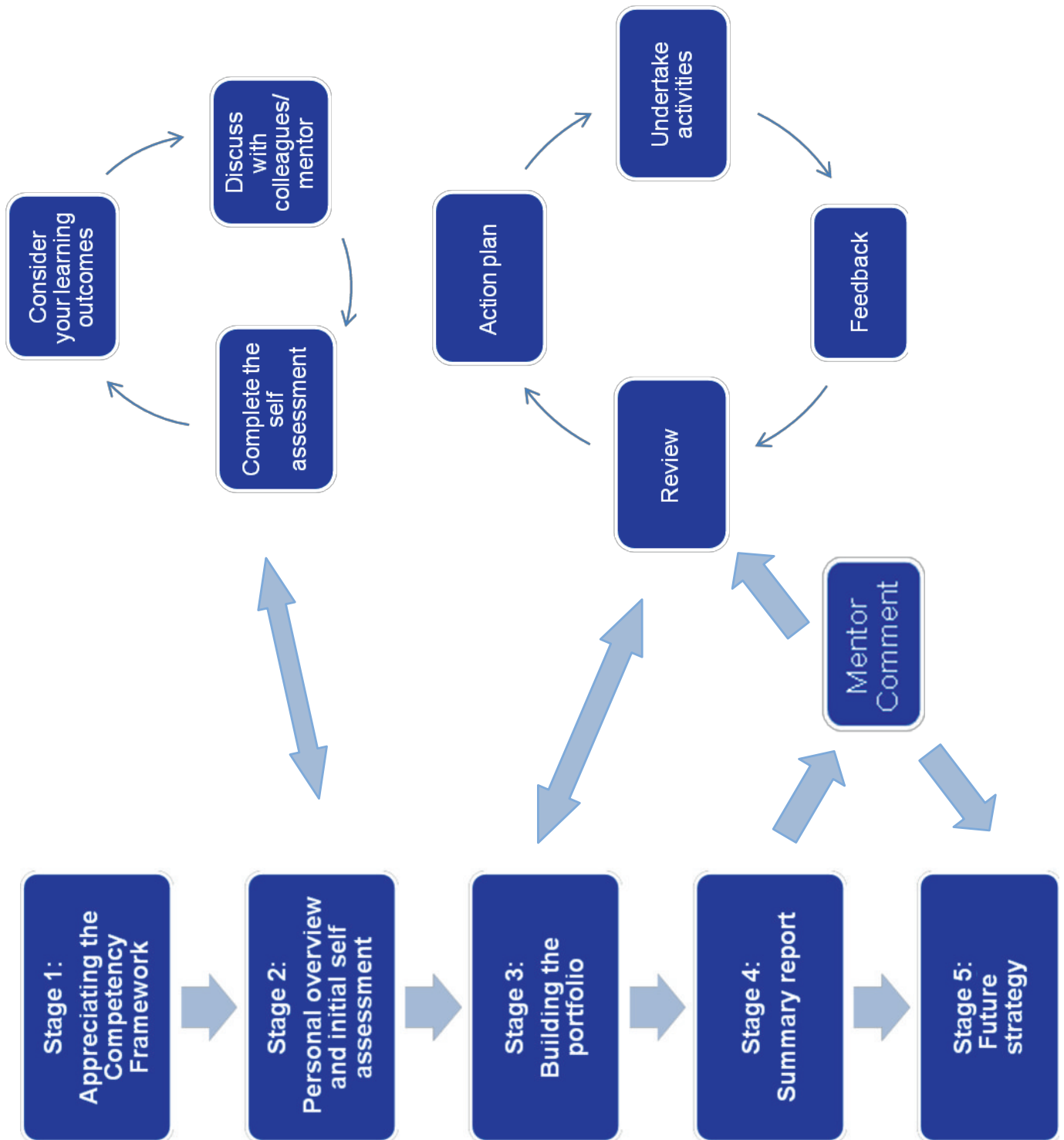


Figure 2: **Example of Work Sheet B**

Example Work Sheet B: Personal Flexi-Path Portfolio - Evidence Directory

| Reference No. Assign a unique reference number of your choice to each piece of evidence | Description | Competence Reference You may choose to reference a piece of evidence for several competence fields. Record all fields here |
|--|-------------|--|
| | | |
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Stage 3: Building the portfolio

Using your personal documents and other evidence you will be able to:

- i. Identify where you can consistently demonstrate your highest performance levels.
- ii. Locate appropriate evidence to place in the portfolio. Reference each piece of evidence and record each item of evidence on the Work Sheet B: Personal

Flexi-Path Portfolio – Evidence Directory. You will need to make your own value judgements on what evidence is the most appropriate to include in your portfolio. The suggestions included in the competency statements are for guidance only, you may find alternatives. The evidence does however need to be put into context, see iii below. See Fig 2 for a worked example of Work Sheet B.

It is envisaged that your portfolio may take some time to complete in full and you may therefore wish to refer to your personal diary, email log or to keep a journal of your work activities to assist in the preparation of your portfolio. Your journal entries may then become an element of your evidence.

- iii. Using the Work Sheet C: Personal Flexi-Path Portfolio – Evidence Summary proforma, briefly describe the scenario within which you were able to meet the competence statement(s) and index your evidence against these. For example providing a piece of marketing material which you have designed and written will not in itself prove that you have met level 6 of competence PPL2. You will need to demonstrate the process of your involvement, see Fig.3 for a worked example. This may be through evidencing emails/ reports seeking comments on your draft for example and/ or a short descriptive note.
- iv. Consider those competences for which you are unable to provide sufficient evidence. Prepare an Action Plan using Work Sheet D: Flexi-Path Action Plan identifying your development needs and how these may be addressed, for example through job shadowing, mentoring or negotiating additional work outside of your remit. You may find it helpful to discuss your plan with your Mentor, a line manager or colleague.
- v. Specify any other valued competences not scheduled elsewhere irrespective of whether you currently have supporting evidence, making a note of the way these contribute to your job performance.
- vi. Obtain constructive comment from your Mentor to help you to gauge your performance levels against levels defined in this framework. This provides the opportunity to identify further evidence and/ or seek further experience to satisfy the stated performance level.

Checklist

Stage 3:

- Complete

Worksheets B, C

& D In Part C



To stage 4



Your Audience

Before you commence in building your portfolio, it will be worth considering who may subsequently have access to it. Having this sense of audience may guide your selection of particular items of evidence and it will be worthwhile discussing this with colleagues and/ or your Mentor at this stage. Additionally you may wish to consider its value to:

- ✓ Orientate you in terms of a personal review of your competences in employment
- ✓ Provide you with a local endorsement of these qualities that may permit job progression
- ✓ Help you identify those areas of professional expertise that you would wish to extend and build upon
- ✓ Increase your job satisfaction
- ✓ Increase your employability in a demanding job market

Stage 4: Summary report

You will summarise your portfolio evidence into a short report using Work Sheet E: Summary Report which draws attention to your overall strengths and weaknesses and may be endorsed with additional commentary by your Mentor. It is suggested that you structure your summary with a general statement which might contain notes about:

- the context in which you are currently working and key responsibilities, as this will provide a background for anybody reading your summary when you are not present.
- what you feel you have learned through the process of compiling your portfolio.

After this review the evidence that you have compiled for each of the Clusters, looking at the balance demonstrated between level 6 and level 7 competences and noting all the most outstanding features.

An overview of your performance within the cluster would be helpful as it can put key attributes into context. Below this a brief analysis of your strengths and weaknesses may help you to focus on professional development needs and opportunities.

This should then feed into a description of your priority areas for development, which might include a rationale that could be used to promote the case for time and resources to enable you to meet defined objectives.

Submitting the Summary to your Mentor will provide you both with a framework to consider the 'journey' that you are taking and to provide opportunities for further constructive dialogue. Your Mentor should then be able to add a few paragraphs in a statement endorsing your report and drawing attention to aspects that you would for various reasons be unable to – like, "Everyone thinks this is a fantastic colleague, someone always brimming with ideas!"

Checklist

Stage 4:

- Complete

Worksheet E

in Part C




To stage 5



The Nature of Portfolio Evidence

The content of your portfolio will support one or more of your competency statements. It may consist of personal or public material, published or unpublished. It may come in a wide variety of forms and although not necessarily the original document etc. it should be verifiable as genuine evidence. The examples in the schedule in Section B of this toolkit are only that; examples. It will be your judgement as to what evidence best fits each competency statement. With this in mind, clear referencing of your evidence is important so that its link to individual competences can be made clear.

Figure 3:
Example Work Sheet C: Personal Flexi-Path Portfolio -
Evidence Summary

| | | | | | | |
|---|---|--|---------|--|---------|---|
| Competence Ref: | Competence Descriptor: | | | | | |
| PRT1 | Organisational Strategy - developing a client centred lifelong learning culture within the organisation which responds to political, social and economic issues | | | | | |
| Competence Level | Level 6 | | Level 7 | | ✓ | |
| <p>Personal Statement</p> <p>During the economic downturn, I was a member of the Regional Adult Education Council(RAEC) that had an overview of staff development and basic skills provision across a range of agencies. I chaired the RAEC's implementation group that worked with a development officer to plan and deliver a staff development programme for those newly working with unemployed people. I fulfilled this role during a period when sub-groups were formed, events planned and delivered and publications produced. I had a major role in all of these actions, maintaining overall direction and supporting practitioners in meeting the challenges that arose. I also contributed to specific strands relating to learners with disabilities within the overall framework of the national project.</p> <p>At a local level I was involved in establishing a foundation, Multi-Agency Action on Unemployment, which worked more directly with learners.</p> | | | | | | |
| Referencing of Evidence EX1 | <p>Rationale for Inclusion</p> <p>Illustrates working at policy level and substantial role in implementation relating directly to learners' needs arising from economic change.</p> | | | | | |
| Mentor's Comments | An important role, admirably fulfilled. | | | | | |
| Level Achieved | Not Yet Met | | Level 6 | | Level 7 | ✓ |
| Signed by Mentor | <div style="display: flex; justify-content: space-between; align-items: center;"> A. Mentor  </div> | | | | | |

Stage 5: Future strategy

In undertaking this in depth review of your competences you will have undoubtedly been thinking about where this could take you as a next stage. The authors of this pack have been very clear in their own discussions that the use of such a toolkit has to mean something to the user; it must not just have been a form filling exercise. We certainly hope that it will have generated a sense of personal satisfaction to know that your career has progressed thus far. However our intention has always been to help you see the range of opportunities ahead of you. Clearly increasing your employability is expected to be a key outcome. We expect that overall the outcomes will have had two components;

- i. Creating a structured statement relating to the totality of your high level competences so that this is immediately accessible to an employer in a readily understood form.
- ii. Leading you to seek out opportunities to increase the range and depth of your experience and to demonstrate your ability to meet new challenges.

In addition there has always been an assumption that, in the light of the Bologna Process, higher education institutions would increasingly be anxious to endorse such statements of competence with modular awards that would complement the knowledge based elements traditionally associated with a taught programme at Masters level.

Beyond these considerations your desire to take an even bigger challenge may have been fed by these processes and discussions with colleagues, a Mentor and/ or manager in your organisation. You will now have a clearer idea of what you might aspire to and the relevant

Checklist

Stage 5:

• *Achieve Personal Satisfaction*

• *Update CV*

• *Review Opportunities Ahead*

- *Broaden*

Experience

- *New Job*

- *Seek*

Accreditation

- *Bigger Challenges*



Points to Remember

- Flexi-Path is primarily a tool for the individual user. However it may contribute to team building and role differentiation.
- Flexi-Path will not in itself lead to accreditation but it does provide a framework for presenting evidence for Credit Accumulation.
- Valuing your own experiences is at least as important as the endorsement you give to your students and colleagues.
- Working with Flexi-Path as a professional development tool is a dynamic process. Use it to build and extend the picture of you in your role in your profession, in the community and as a leader in learning.

Figure 4: An Adult Educator Competency Framework

| Learning Cluster | People Cluster | Practice Cluster |
|------------------------------------|---|---------------------------------|
| Curriculum and Subject Development | External Relations | Organisational strategy |
| Personalisation | Marketing | Financial Management |
| Metacognition | Learner Engagement | Accountability |
| Teaching and Learning Methods | Communication | Programme Development |
| Fields of Knowledge | Information, Advice and Guidance | Premises and Facilities |
| Learning Resources | Context and Community | Sustainability |
| Quality Improvement | Community Development | Leadership |
| Accreditation and Validation | Diversity and Equality | Team Management |
| Specialist Subject Knowledge | Employer Engagement | Staff Development and Appraisal |
| Learner Progression | Rights, Responsibilities and Restrictions | Professional Development |
| Evaluating Learning | Intergenerational Learning | Learner Responsiveness |

Use this chart like a Menu to help you select items that you feel represent your strengths.
Alternatively use it to identify areas where you wish to become more competent.
Then refer to Part B and review your competences against the EQF level criteria.

3. The Competency Framework

The Competency Clusters

In looking through and subsequently using the competency framework you will note that these have been divided into three groups or 'clusters' (Fig. 4). There is nothing very scientific about these divisions but at a practical level they may be useful to help you focus on one main theme at a time rather than looking across the full range of your competences. In doing this you may see more readily where your skills and experience are stronger and more developed in one allied area than another.

This latter point is significant as it may lead you to consider what job opportunities you have had which led to this varied pattern as well as looking at the ways this influences your current job performance.

Overall we believe that various specialisms within adult education will show a greater concentration of high level competences in one cluster than the others. It therefore represents an analytical tool for you and your professional development adviser. Further it may indicate to an employer your special strengths and therefore your ability to meet certain employment objectives more readily than others competing for the same position.

Beyond these personal considerations we believe that in presenting evidence to an accrediting or awarding body for academic credits it will be helpful to show some element of systematic analysis, although of course these bodies will have their own structures for comparison and grading.

EQF Level 6 & Level 7

Throughout this document we use the terms Level 6 & Level 7 to denote the performance criteria for individuals who carry significant responsibilities for the development and transfer of knowledge and/or leading teams working in demanding circumstances.

The European Qualifications Framework is by its very nature generic and therefore able to be adopted in any and every field of employment. At levels 6 & 7 the grade criteria used for competences are: -



The European Qualifications Framework (EQF)

This framework for is by its very nature generic and therefore able to be adopted in any and every field of employment. At levels 6 & 7 the grade criteria used for competences are as shown: -

EQF LEVEL 6

- Manage complex technical or professional activities or projects, taking responsibility for decision making in unpredictable work or study contexts.
- Take responsibility for managing professional development of individuals and groups.

EQF LEVEL 7

- Manage and transform work or study contexts that are complex, unpredictable and require new strategic approaches.
- Take responsibility for contributing to professional knowledge and practice and/or for reviewing the strategic performance of teams.

The European Qualifications Framework for Lifelong Learning (EQF). <http://ec.europa.eu>:
http://ec.europa.eu/education/pub/pdf/general/eqf/broch_en.pdf (European Commission, 2008)

Thus in our competence framework, against each field, we present reference notes for the two levels. These are not definitive but they are based on evidence of professional practice in the experience of the seven project partners and draw on published guidelines used in individual member states. It is our view that they therefore meet the compatibility criteria for EQF. It would of course be as well for you to compare our criteria with any used in other national frameworks that are normally accepted in your own geographical area and to check for any significant variations.

Definition of Competences and Clusters

As explained earlier the grouping of competences into clusters in this document is somewhat arbitrary as are the competence statements themselves. It is hoped that they will serve as an organisational tool rather than representing any rigid demarcation. Indeed as has been pointed out there is a resemblance between PPL6 & PPL7; however specialists in these areas of work will recognise that despite their overlaps the approaches of skilled practitioners will show distinctly different qualities.

The rationale for the three clusters is more clear cut. It has been a consistent theme in the work of this project that there are identifiable specialisms amongst adult educators across Europe which merit recognition. We therefore look forward to some future position where academic credits might be awarded through Accreditation of Prior Experiential Learning (APEL); Flexi-Path offers a practical and structured approach to presenting the evidence for this.

Each cluster is given a single word heading to denote its inclusiveness and breadth, rather than this being a tight definition.

Cluster LRN – Learning

While the central core of the work of adult education organisations is to support learning activities within a wide population, usually with very specific agendas, it does not necessarily feature as a staff competency at levels 6 & 7. However the design of a range of courses to meet the needs of a diversity of learners in a wide range of communities and planning and providing learning materials etc gives this cluster great breadth and objectivity.

Cluster PPL – People

Here we cover all aspects of supporting, managing and engaging with people across the breadth of organisations themselves and into wider contexts and communities. The competences are therefore as much about the role of educators themselves as the interactions with all those with whom they work.

Cluster PRT – Practice

This grouping primarily relates to the management of adult learning organisations from the 'top to the bottom'. It covers organisational and financial affairs and the ways that whole organisations are governed and meet their accountabilities

4. Career Pathways

It is inevitable that the career pathways of senior adult educators across Europe will be as many and varied as the individuals holding such positions.

This implies that their more specific competences at levels 3, 4 & 5 will already have been recognised and verified.

Such competences within specialised fields are the essential elements in an adult education operation and can be expected to form the basis for taking more senior roles. In the same way that these underpinning competences will show great variety and be demonstrated at different levels so too will the level 6 & 7 competences profiled here.

For these reasons it should not be expected that the lists of competences or indeed the clusters we have grouped them in are either definitive or exhaustive.

Our aim in this project has been to describe a core of competences which senior adult educators will demonstrate at the higher levels described. The likelihood is that personal profiles will be very complex and highly individual, although colleagues fulfilling similar roles may show similar competence patterns.

In many cases the competence described may not be relevant to the individual or the organisation they are working in. It is hoped therefore that users of this toolkit will not struggle to tick every box or to assume some degree of failure if not every competence is demonstrated at level 7 or indeed level 6.

‘Life is a journey’ goes the saying and in Flexi-Path we hope you will find means of showing the milestones reached as well as looking forward to future goals. This is why we suggest looking through the lists in a very preliminary way and gaining an overview of each competency to consider whether you may possibly be working at level 6, maybe level 7 or not able to demonstrate this competence at either level. It is suggested you keep a simple note of these ideas so that you can go back to them later and take a fresh look as you build a familiarity with the proposed grade levels for level 6 & 7 competences supported by some evidence.

5. Obtaining support and guidance

In undertaking the task of building a professional portfolio for reflection and career development, it is recognised that the user of this document will already have a wide range of skills. In addition professional colleagues and employing bodies may be able to offer many forms of support and/or guidance.

This Part of our publication does not seek to do more than alert you as a user to the wider range of resources which may be available to you as you work through the process of developing your portfolio.

It is suggested that you prepare your own list of such individuals and organisations and make a note of their actual or potential value to you. Keep a record of when you contacted them, the topic which is dealt with and the value/relevance that you place on their advice, etc.

Sample List

| | | | | |
|------------------------|---------------------------|------------------------|------------------------------|---------------------------------|
| Universities | National Agencies | Employer Organisations | Government Departments | Third Sector Specialists |
| Peers/ Work Colleagues | Professional Associations | Research Institutes | Broadcasters and Journalists | Examination and Awarding Bodies |
| Subject Associations | Internet Resources | Specialist Libraries | Inspection Bodies | Consultancies |

As indicated previously a key aspect in using the Flexi-Path Framework is to enable you to progress professionally. It is hoped that through the kinds of support and guidance you receive you will be encouraged to undertake new projects and face new challenges. You may quite possibly change jobs; even use your portfolio evidence to help you do so. A great value of this resource is that you can keep adding to and updating it; seeing where new opportunities give rise to enhanced performance and development of new competences.

6. Flexi-Path in context - a management perspective

Defining and assessing competences

This project addresses a key issue in EQF; that is recognising the non-academic components which relate to skills, abilities and experience. These attributes are not generally well addressed in the Higher Education sector, where the agenda is dominated by the knowledge component. Within the context of the inter-governmental strategy agreed by the European Commission as Europe 2020 the legacy of the Lisbon Strategy and the Bologna Process continues as determined by the Budapest/Vienna Declaration of June 2010. This leads to an emphasis on self-assessment which correlates with well-established international practice in quality assurance (QA). Especially at levels 6 and 7 we believe that practitioners are well able to judge their own performance if they are provided with adequate guidance. This toolkit aims not only to provide that guidance but also a framework whereby significant elements of competency can be identified and referenced against clear evidence.

Contributing to staff development strategies

The portfolio based approach adopted in this toolkit has been commended by staff development specialists as a tool that might be more widely used. Adopting a wider range of level indicators would potentially enable adult educators earlier in their careers to systematically identify their strengths. They and their managers would then have a more robust set of indicators of development needs related to current and future job requirements.

Impact on work teams

During the development of this toolkit it has been suggested that a whole team approach may have merits in terms of identifying complementary strengths – enabling more successful deployment of team members to address current needs of an organisation. The open discussion of the valued competences in a team may assist team building and increase the commitment of individuals where they can see that their part in an enterprise is fully valued and endorsed. This approach would of course also assist in the identification of gaps which Human Resource specialists would look to compensate for in deployments and recruitment.



The Flexi-Path Competency Framework

1. Adult Education Learning Cluster
2. Adult Education People Cluster
3. Adult Education Practice Cluster

1. Adult Education Learning Cluster

| Field | Competence | Page No. |
|-------|------------------------------------|----------|
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| LRN2 | Personalisation | 26 |
| LRN3 | Metacognition | 27 |
| LRN4 | Teaching and Learning Methods | 27 |
| LRN5 | Fields of Knowledge | 28 |
| LRN6 | Learning Resources | 28 |
| LRN7 | Quality Improvement | 29 |
| LRN8 | Accreditation and Validation | 30 |
| LRN9 | Specialist Subject Knowledge | 30 |
| LRN10 | Learner Progression | 31 |
| LRN11 | Evaluating Learning | 31 |

2. Adult Education People Cluster

| Field | Competence | Page No. |
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| PPL1 | External Relations | 32 |
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| PPL3 | Learner Engagement | 33 |
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3. Adult Education Practice Cluster

| Field | Competence | Page No. |
|-------|---------------------------------|----------|
| PRT1 | Organisational Strategy | 40 |
| PRT2 | Financial Management | 40 |
| PRT3 | Accountability | 41 |
| PRT4 | Programme Development | 42 |
| PRT5 | Premises and Facilities | 43 |
| PRT6 | Sustainability | 43 |
| PRT7 | Leadership | 44 |
| PRT8 | Team Management | 44 |
| PRT9 | Staff Development and Appraisal | 45 |
| PRT10 | Professional Development | 46 |
| PRT11 | Learner Responsiveness | 46 |

1. Adult Education Learning Cluster

While the central core of the work of adult education organisations is to support learning activities within a wide population, usually with very specific agendas, it does not necessarily feature as a staff competency at levels 6 & 7. However the design of a range of courses to meet the needs of a diversity of learners in a wide range of communities and planning and providing learning materials etc gives this cluster great breadth and objectivity.

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|--|--|---|
| LRN1 | Curriculum and Subject Development - initiate and monitor curriculum design and development. | You take an active role in shaping the curriculum and monitoring its appropriateness and effectiveness in meeting the needs of local learners and employers. | You actively undertake research into the learning needs and preferences of the local communities and businesses, as well as national trends and initiatives. You lead on decision making processes about curriculum provision, ensuring that duration, level, location and timing are appropriate. You ensure cross-curricular planning and wherever possible the embedding of literacy and numeracy into all areas of the curriculum. | Minutes of meetings Needs analyses undertaken Evidence of community involvement Actual curriculum design |
| LRN2 | Personalisation - ensure individual learners are | You support the teaching and assessment teams to ensure that learners are supported through effective Individual Learning Plans | You actively monitor the efficacy of ILPs, discussing and implementing changes when necessary to meet the needs of individual learners and the | Minutes of meetings Presentation |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|---|--|---|
| | supported to optimise progression and achievement. | (ILP) and that their progress is monitored throughout their learning journey. | requirements of awarding bodies and QA processes. | notes/slides Adapted ILPs |
| LRN3 | Metacognition - initiate and monitor learning and teaching strategies that enable effective individual learning. | You recognise and advocate learning and teaching strategies that ensure individual learners' styles and experiences are identified and valued. You encourage the teaching staff to explore innovative ways to enhance learners' study skills. | You research the concept of metacognition and its place in the learning agenda. You demonstrate a strong understanding of individual learning strategies and styles and advocate the embedding of effective study skills into all areas of the curriculum. | Minutes of meetings Presentation notes/slides Your own Continuous Professional Development record |
| LRN4 | Teaching and Learning Methods – ensure that staff and learners engage in activities that promote effective learning. | You draw on a wide experience of teaching and facilitating learning to monitor and advise on individual practice and group progresses in appropriate learning environments. | You maintain an overview of methodologies that support learning and ensure that staff development programmes reflect the most advanced thinking and technical support for front- line staff. You provide appropriate frameworks for learners to understand, engage with and value those methods and resources deemed to most effectively support learning, including strategies for their own autonomous activity. | Notes of staff workshops Monitoring and inspection reports Photographic and wider evidence (student feedback) |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|---|---|---|
| | | | | Individual Learning Plans |
| LRN5 | Fields of Knowledge - obtain, analyse and apply information. | <p>You seek out and review information relevant to current needs and expectations.</p> <p>You incorporate relevant knowledge and ideas into your action planning.</p> <p>You assist team members in acquiring information and using systems to aid planning and delivery of programmes.</p> <p>You are aware of issues related to intellectual property rights and ensure that all members of your team comply with these requirements.</p> | <p>You have a detailed knowledge of current sources of information related to your role and systematically review and apply this.</p> <p>You incorporate and disseminate relevant information internally and across networks.</p> <p>You have awareness of and selectively review ancillary ideas and information that may be applied.</p> <p>You will maintain your organisation's credibility by ensuring adherence to Intellectual Property Rights and all other legal restrictions in the use of knowledge.</p> | <p>Minutes of meetings</p> <p>Action Plans</p> <p>Reports</p> <p>Protocols</p> <p>Your own Continuous Professional Development record</p> |
| LRN6 | Learning Resources - ensure sufficient and appropriate assignment of resources to | <p>You ensure that there are sufficient resources for effective learning, including specialist equipment, staff/learner ratios and support staff for special needs.</p> <p>You support the development of</p> | <p>You research and, where possible, trial innovative learning processes, advocating and implementing them when appropriate and in agreement with teaching and technical support staff. You advocate flexible learning</p> | <p>Curriculum descriptors</p> <p>Minutes of meetings</p> |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|--|---|--|
| | support learning. | flexible learning methods, including blended and e-learning. | approaches, including blended and e-learning. Successful applications of new approaches are disseminated amongst staff. You ensure that sufficient funding is available for all resources to support learning, including suitable staffing levels and learner/staff ratios. | Proposals |
| LRN7 | Quality Improvement - monitor and evaluate learning programmes, using data for implementing improvement. | You play an active role in quality assurance and improvement by monitoring learner feedback, evaluation, retention and achievement data, the quality of materials, including marketing brochures and communicate such findings to the staff teams. You monitor the grades and quality of reports from the Observation of Teaching and Learning (OTL) process. You implement changes as and when needed as a result of quality monitoring. You liaise with external inspection personnel. | You carry out benchmarking analyses with similar organisations to ensure that quality is of the highest possible standard. You research external inspection findings. You monitor quality measures on a regular basis and, in consultation with appropriate staff members, implement adjustments when necessary. You carry out standardisation of OTL and communicate findings to staff teams. You take a lead on supporting the external inspection process. | Minutes of meetings Communications to teams Benchmarking analyses Moderation grading Inspection findings Staff appraisal report |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|---|---|---|
| LRN8 | Accreditation and Validation - lead on awarding bodies' QA and ensure appropriate accreditation pathways are adopted. | You take an active role in decision making about appropriate awarding bodies, monitoring and supporting accreditation and Quality Assurance processes and ensuring that, where relevant, learners are able to gain externally validated accreditation You are active in getting new courses accredited with appropriate awarding bodies. | You actively research and liaise with appropriate external agencies to ensure accreditation and qualifications adopted within the organisation are appropriate for learner progression into further training and work. You are active in getting newly designed courses accredited where appropriate. You are in contact with awarding bodies, affecting their future decision making in the light of your learners' experiences. | Minutes of meetings Quality Assurance reports from awarding bodies Communications to staff and to learners Publicity materials Communication with awarding bodies |
| LRN9 | Specialist Subject Knowledge – Maintaining a high level of technical preparedness within your principal | You keep up to date with current trends in your main area of expertise. You maintain an overview of related topic areas and are able to contextualise new developments in terms of your teaching and curriculum development. You carry out personal studies and projects related to your specialism. | You are at the forefront in research and understanding of your main field of knowledge and activity. You create opportunities for your colleagues and learners to experience and gain value from your advanced knowledge and/or technical excellence. You contribute to dissemination activity | Notes and lesson plans Photographs Staff briefings Student information |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|--|---|---|
| | curriculum area. | | linking your knowledge to adult education practice. | sheets Workshop programmes |
| LRN10 | Learner Progression – within and across curriculum and institutional boundaries | You identify and promote opportunities for learners to progress to further learning activities within your organisation, with another relevant body and/or autonomously. | You are proactive in securing further learning opportunities for learners that build on experiences within your organisation. You encourage diversity within learners' journeys and publicly endorse their successes. You assist staff to create conditions within which Information, Advice and Guidance (IAG) can be most beneficial. | Notes of meetings Policy framework documents Internal literature |
| LRN11 | Evaluating Learning – Recognising and responding to the challenges for and the successes of learners. | You help staff to work with learners to share understanding of their achievements and barriers to learning. You maintain appropriate methods to assess learning outcomes. You ensure learners' progress and achievement is recorded and use this information to develop teaching and learning. | You ensure that staff are well equipped to understand and respond to learners' progress and achievements. You identify and approve methods and approaches to evaluate teaching and learning. You use evidence from evaluation procedures to support strategic development of the organisation. | Completed evaluation schedules from teachers and learners Internal performance reports Staff development programmes |

2. Adult Education People Cluster

Here we cover all aspects of supporting, managing and engaging with people across the breadth of organisations themselves and into wider contexts and communities. The competences are therefore as much about the role of educators themselves as the interactions with all those with whom they work.

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|--|---|---|
| PPL1 | External Relations – maintaining relationships with all stakeholders. | You maintain active contacts with internal and external stakeholders and monitor the effectiveness of your team members in maintaining the effectiveness, usefulness, relevance and credibility of those contacts. | You seek out and create meaningful and dynamic engagement with bodies in the community and related educational establishments, amongst employers, professional organisations, the media and politicians to secure understanding of and support for the work of your team and the organisation as a whole. | Project reports Minutes of meetings Workplans Action Plans |
| PPL2 | Marketing – demonstrating, in highly visible ways, the responsive nature of the organisation to individual and collective adult learning needs. | You work within your team and more widely across the organisation, to identify actual and potential opportunities to engage with adult learners. You consult within your local area and take note of current learners' | You secure the best positional strategy to present your organisation as the 'brand leader' for key aspects of its mission. You plan strategically and make use of all opportunities to articulate the core mission | Publicity strategy Consultation reports/ surveys Marketing products |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|--|---|---|
| | | feedback to plan and deliver an effective and attractive offer of learning opportunities within the capacity of the organisation to deliver. You contribute to departmental and collective publicity strategies and advise on key messages to your anticipated audience. | of your organisation and to demonstrate its effectiveness in exceeding the expectations of current learners and the wider community-of-interest within which the organisation operates. You ensure that the widest range of media resources is accessed and appropriately used. Learners' positive comments are used in publicity. Your core mission and values are clearly publicised through channels such as strap lines, logos and publically displayed mission statements. | Marketing analysis Business plans Minutes of Board meetings Analysis of consistent compliments |
| PPL3 | Learner Engagement – keeping 'the learner' as the central concern of the organisation. | You recognise and actively pursue approaches to adult learning that take account of the centrality of the learner's experience, both individually and collectively. | You develop innovative approaches to respond to the needs of learners, individually and collectively, and commission learner support services appropriate | Delivery plans Reviews of procedures Complaints and |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|--|--|--|
| | | <p>You plan and deliver a range of learner support services to identify, respond to and meet individual needs (e.g. related to disability, basic skills issues, social issues etc.)</p> <p>You ensure that all arrangements for learner enrolment, accreditation and support services are fit for purpose and operate to maximum effectiveness.</p> <p>You ensure the implementation of all aspects of complaints and dispute resolution procedures.</p> | <p>to learner's needs.</p> <p>You ensure that the learner is central in the development of service improvement plans.</p> <p>You are active in meeting learners and getting to know them and their preferences.</p> | <p>Compliments analysis</p> <p>Case studies</p> <p>Improvement plans</p> |
| PPL4 | Communication – demonstrating that you communicate effectively with all employees within your organisation and in your wider networks. | <p>You maintain effective communication channels with your staff, including regular team meetings, which are accurately minuted and e-mails and telephone calls to ensure staff and others are kept up to date.</p> | <p>You actively ensure that all staff within the organisation are kept up to date with all necessary information, through all relevant media.</p> <p>You seek new ways of ensuring that communication within the organisation at all levels is effective and timely.</p> | <p>Meeting minutes</p> <p>Witness testimony</p> |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|--|--|---|
| PPL5 | Information, Advice and Guidance – ensuring that learners individually and collectively are supported to enter, enjoy and progress through and beyond their specific learning activity. | <p>You maintain open dialogue with learners and external agencies to ensure that the provision of learning opportunities is consistent with expressed need and that unmet need is identified and responded to.</p> <p>You ensure that learners' individual learning styles are responded to and that appropriate resources are deployed to support their learning.</p> <p>You ensure that individual learners are supported to identify and work towards their longer-term learning goals.</p> | <p>You take a strategic view of the organisation's role as a learning provider and determine, in conjunction with others, the direction of developments. You communicate this vision to others and adapt your strategies in the light of both informal and structured feedback.</p> <p>You identify opportunities to increase and enhance the availability of IAG to all learners taking account of their diverse abilities and needs.</p> <p>You ensure that individual learner's needs and interests are recognised and that they are signposted to relevant people and resources including other appropriate organisations.</p> | <p>Action Plans</p> <p>Improvement Plans</p> <p>Minutes of meetings</p> <p>Service reports/ reviews</p> <p>Case studies</p> |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|---|---|--|
| PPL6 | Context and Community – ensuring that your organisation remains a listening and responsive body, capable of changing to meet local expectations and needs and ensure the organisation is the right place to learn. | <p>You understand and engage with key individuals in the community served by your organisation and demonstrate that you recognise the validity of the range and diversity of agendas that they bring to their interactions with you and your team.</p> <p>You plan activities and opportunities for your team members to interact professionally with individuals in the community to gain mutual recognition and regard.</p> | <p>You demonstrate through all your own actions and the statements made by and on behalf of the organisation that there is a recognition that your organisation only exists thanks to the ongoing support of the wider community and the explicit engagement of local learners and other stakeholders in the enterprise.</p> <p>You make yourself available to and seek out those who will enable you to understand more deeply the local perspectives of your organisation and to ensure that it is seen to be responsive to the very diverse attitudes to be found.</p> | <p>Minutes of meetings</p> <p>Workplans</p> <p>Local Action Plans</p> <p>Promotional materials</p> |
| PPL7 | Community Development – contributing to empowerment of individuals and groups and enhancing the wider social and economic development of the various communities in | You recognise and engage with key individuals who work within and for the range of self-identified groups and communities to support the learning of their members | You help to position your organisation in such a way as to identify with its diverse communities and to make it accessible and responsive to locally identified learning | <p>Minutes of meetings</p> <p>Reports</p> <p>Evidence from</p> |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|--|--|--|
| | the area of benefit. | individually and collectively. You help them to locate and utilise appropriate learning resources and expertise as well as to identify and break down barriers to local learning. | needs. Where necessary you sponsor joint action to enable local identification of needs and opportunities that can enhance the quality of life and work in the local area. You actively support the professional growth of the community. | database Promotional materials |
| PPL8 | Diversity and Equality – inclusion, equality of opportunity, intercultural awareness and engagement. | You actively promote equality of opportunity and value diversity in your area of responsibility. You seek to identify the diversity and needs of the community and identify strategies to better satisfy the diverse needs of the community. You approach complaints and grievances with fairness and consistency and tackle discrimination in all areas of your work. You monitor your organisation's enrolment, | You promote and develop a culture within your organisation which promotes inclusion, equality of opportunity and values diversity. You actively consult with and involve stakeholders from all sections of the community in planning and decision making. You ensure that equality and diversity issues are seen to inform the vision and objectives of your organisation and take active steps to ensure that the | Team meetings Action and Improvement plans Minutes of meetings Multilingual documents Reports and investigations Minutes of community |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|---|--|--|
| | | retention and achievement data to ensure that all learners are fairly represented and supported. | organisation's learner profile is representative of the community as a whole. | consultation meetings Policy documentation |
| PPL9 | Employer Engagement – maintaining links with human resources and technical experts to ensure a responsive approach to meeting their learning agendas. | You have effective ongoing relationships with key employers and contacts with a wider circle of economic actors in your sector. From these you are aware of their present training needs and expectations and are able to respond effectively | You lead cross-sector discussions and facilitate exchange with employers and curriculum developers to maintain an excellent and responsive educational provision to meet current and anticipated requirements. | Minutes of meetings Action and Improvement Plans Reports Service reviews Training needs analysis (community/ employer) |
| PPL10 | Rights, Responsibilities and Restrictions – demonstrate a balanced approach to challenging attitudes and behaviours. | You work within the social contexts of challenge and dispute to address anti-social attitudes and behaviours. You maintain opportunities for open discussion and | You recognise and reflect the wider concerns regarding academic freedoms and citizens rights in dealing with complex issues relating to students, staff and the wider | Correspondence with representatives and regulatory agencies |

| Field | Competence | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|---|--|--|
| | | dissent within the legal code. You ensure that any rules are applied fairly and in a non-confrontational manner. | community. You ensure that rules and guidance are clear and legally competent and that their implementation is fair and transparent. | Internal rules and codes of conduct Reports of internal and external enquiries |
| PPL11 | Inter-generational Learning – contributing to age-inclusive strategies for adults of all ages that are mutually advantageous for children. | You contribute to the self-identification of valued learning by people of different ages learning together. You maintain frameworks within which trusting and supportive shared learning can take place for adults and children. You plan effective strategies for adults of different ages to learn collaboratively. | You set standards and strategies for parents and older adults to understand and contribute to the learning of children and young people. You develop strategies for different generations to engage in mutually valued learning opportunities. You ensure that any negative aspects of inter-generational work are understood and effectively managed by all members of staff. | Policy statements and codes of practice for staff working with adults and children Learners' own records and comments Child protection policies Activity programmes for family learning Records of inter-generational events including photographic evidence |

3. Adult Education Practice Cluster

This grouping primarily relates to the management of adult learning organisations from the ‘top to the bottom’. It covers organisational and financial affairs and the ways that whole organisations are governed and meet their accountabilities.

| Field | Competency | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|---|---|---|
| PRT1 | Organisational Strategy – developing a client centred lifelong learning culture within the organisation which responds to political, social and economic issues. | <p>You contribute to the strategic management of the organisation and have a delegated responsibility for decision making in your area of expertise.</p> <p>You are responsible for managing and improving performance and quality within your teams to meet organisational priorities.</p> | <p>You contribute to the strategic management of your organisation and can demonstrate that you drive change within the organisation to reflect the political, social and economic environment.</p> <p>You are responsible for performance and improvement in the service your organisation provides and can demonstrate responsibility for innovative approaches to adult learning in your organisation.</p> | <p>Minutes of meetings</p> <p>Strategy documents</p> <p>Policy reviews</p> <p>Improvement plans</p> |
| PRT2 | Financial Management – financial planning and budget management. | <p>You contribute to the financial planning and budget management of the organisation.</p> <p>You have delegated responsibility for managing a budget for your team or area of responsibility.</p> <p>You ensure that the management of the budget responds to the needs of</p> | <p>You contribute to financial planning and budget management at a high level.</p> <p>You have responsibility for managing a budget for your area of responsibility and have responsibility for budget forecasting and negotiation, responding to the needs</p> | <p>Minutes of meetings</p> <p>Financial strategy documents</p> <p>Funding applications</p> |

| Field | Competency | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|--|--|--|
| | | your users and is in line with organisational priorities. | of your organisation and reflecting action and improvement plans. You are aware of alternative funding streams and can demonstrate your lead in developing and securing alternative funding opportunities. | Expenditure Analysis |
| PRT3 | Accountability – ensuring that the delivery of adult learning in your organisation adheres to local, national and European principles and priorities and identifying and planning for risk. | <p>You contribute to the development of action plans to ensure that your team is aware of and adheres to organisational policies and procedures and in accordance with legal responsibilities.</p> <p>You are responsible for drafting performance reports to senior management and trustees/ elected representatives and communicate and negotiate with the wide range of stakeholders including learners, the local community, staff etc.</p> <p>You consider all aspects of risk in the delivery of your service and plan mitigation and communication strategies to deal with adverse scenarios.</p> | <p>You are responsible for reviewing your organisation's performance in delivering adult learning.</p> <p>You are responsible for drafting improvement plans and driving change within the organisation, responding to stakeholders and local, national and European targets, initiatives and law.</p> <p>You present performance reports and improvement plans to trustees/ elected representative and other stakeholders.</p> <p>You may respond on your organisation's behalf to Government consultations related to the provision of adult learning and/ or negotiate with professional bodies.</p> <p>You consider and plan for risk in the delivery of your service and at a wider</p> | <p>Team meetings</p> <p>Performance Reports</p> <p>Minutes of meetings</p> <p>Improvement Plans</p> <p>Conference Reports</p> <p>Published journal etc. articles</p> <p>Risk assessments</p> |

| Field | Competency | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|---|---|--|
| | | | organisational level. You develop a communication strategy and are responsible for delivering the strategy when necessary. | Communication strategy |
| PRT4 | Programme Development – achieving a balance of activity that, within available resources, reflects organisational priorities, attracts learners and meets community needs. | You show clear evidence that the programming for which you are responsible meets identified needs. You adopt effective staffing strategies to enable colleagues to provide the most effective use of their time in supporting quality learning. | <p>You monitor the patterns of enrolment and student retention and use this information, together with surveys and other data collections to assess current programming and adapt to changing trends.</p> <p>You study a range of public media e.g. press, radio, TV to identify specific topics that are of current interest.</p> <p>You manage a recruitment strategy that enables you to draw on an extended and flexible pool of curriculum specialists.</p> <p>You propose content structure and format in accordance with identified needs and trends.</p> <p>You review the course design against stakeholders' requirements and feedback.</p> | <p>Notes of planning meetings</p> <p>Team briefings</p> <p>Course outlines and publicity</p> |

| Field | Competency | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|--|--|---|
| PRT5 | Premises and Facilities – managing the infrastructure to allow the provision of a quality adult learning service. | <p>You manage a range of premises and facilities to allow for the delivery of effective adult learning in your area of responsibility.</p> <p>You ensure that accommodation is accessible to your users and appropriate for their needs. You are aware of user's special needs and seek to ensure that adequate adaptations are in place including facilities for interpretation, translation, disabled access, provision of crèche facilities etc.</p> <p>You ensure the safety of users and can illustrate compliance with health and safety law and other relevant legislation.</p> | <p>You are responsible for securing adequate and appropriate accommodation for learner engagement taking account of all curricular, access, safety and sustainability issues.</p> <p>You ensure the proper conduct of all responsible individuals to maintain satisfactory learning environments and the safety and wellbeing of all users.</p> <p>You ensure that all facilities currently in use are monitored for compliance and that appropriate records are maintained.</p> | <p>Minutes of meetings</p> <p>Inspection reports</p> <p>Case study evidence of actions to meet identified needs</p> <p>Plans, maps & diagrams for easy use of facilities by both learners and staff</p> |
| PRT6 | Sustainability – balancing protection of the organisation, the local economy and the environment. | <p>You seek means to reconcile conflicting demands on your team and the wider organisation.</p> <p>You act as a role model for colleagues and learners in terms of socially responsible values and behaviours.</p> | <p>You establish clear frameworks for identifying conflicting institutional goals.</p> <p>You make clear the reasons for strategic decisions and support individuals in understanding and implementing “least-worse” solutions.</p> | <p>Risk assessments</p> <p>Environmental monitoring reports</p> <p>Campaign publicity</p> |

| Field | Competency | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|---|---|--|
| | | | | Budget forecasts Staff circulars |
| PRT7 | Leadership - inspiring and leading change within your organisation. | You build and maintain productive working relationships, dealing professionally with any conflicts between colleagues and/ or learners. You work within your own team and act as a reference-point across teams to implement change agendas and to identify and address issues that impede this process. | You demonstrate leadership skills that support high quality creative educational practice. You are responsible for leading and developing change within your organisation, communicating change within the organisation and to the wider stakeholders. You anticipate changes in the internal and external environment and plan to meet them. | 360° assessments Minutes of team meetings Project reports |
| PRT8 | Team Management – leading performance improvement within your team and responding to underperformance. | You have built a strong and effective team to deliver your area of service. You are responsible for managing absence and capability issues within your team and are effective in your relationships with other stakeholders, e.g. trade unions. You are aware of the legal frameworks relating to employment and comply with best practice. | You can demonstrate your advanced team management skills, using innovative approaches to inspire and develop your team(s). You engage with individuals and groups to identify challenges to their performance and to take action to support or reorganise their activities. You keep up to date with relevant employment law and maintain effective contact with Human Resources professionals. | Minutes of meetings 360° assessments Improvement plans Workplans Notes relating to |

| Field | Competency | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|--|--|--|---|
| | | | You promote an environment in which linguistic and cultural differences are valued and appreciated. | Legal Advice |
| PRT9 | Staff Development and Appraisal—ensuring your staff explore and reach their potential, managing performance and improvement. | <p>You support and develop your team and those individuals within your team to achieve their potential and ensure high performance.</p> <p>You contribute to mentoring/ job shadowing initiatives.</p> <p>You make recommendations to the staff development team for resources to meet identified needs.</p> <p>You carry out staff appraisals on a regular basis, assess development needs, agree goals and targets in line with organisational priorities and monitor performance against targets.</p> | <p>You assess the training and development needs of all staff across the team(s) that you have a responsibility for.</p> <p>You develop training plans, agree the content of courses, negotiate with providers and establish alternative methods for supporting staff e.g. mentoring and job shadowing and monitor progress against the plans.</p> <p>You are responsible for managing a staff appraisal scheme within your organisation.</p> <p>You develop policy and procedures relating to staff training and development.</p> <p>You seek innovative ways to inspire staff and can demonstrate how you have implemented change.</p> <p>You encourage staff to become involved in the identification and planning of their own professional development.</p> | <p>Staff workplans</p> <p>Minutes of meetings (all confidential information removed)</p> <p>Policy drafts indicating your involvement</p> <p>Procedures (indicating your involvement)</p> |

| Field | Competency | Level 6 Characteristics | Level 7 Characteristics | Suggested Portfolio Evidence |
|-------|---|--|---|---|
| PRT10 | Professional Development – being aware of your own professional development. | <p>You take opportunities to develop yourself professionally including undertaking research on adult learning practice, management and leadership.</p> <p>You broaden your range of competences at level 6 to enable you to meet new challenges related to teaching and learning.</p> <p>You consider an action plan to develop your competences to level 7.</p> | <p>You contribute to professional knowledge and practice in the adult learning field.</p> <p>You participate in professional networking, participate in peer reviews, initiate research activities and may contribute to professional journals.</p> <p>You seek out evidence of enhanced practice to inform your own development.</p> <p>You use self-review and stakeholder feedback to improve own professional knowledge and practice.</p> | <p>Professional articles</p> <p>Post training course evaluation</p> <p>Mentoring and job shadowing evidence</p> |
| PRT11 | Learner Responsiveness - listening and responding to the concerns of individuals and groups of learners | <p>You maintain a regular dialogue with learners and their representatives concerning matters for you which are responsible.</p> <p>You seek to make adjustments to your practice and that of others, to facilitate the articulation of the learners' voice and respond positively and appropriately.</p> | <p>You create opportunities both formal and informal, to keep yourself and others in touch with the views of learners.</p> <p>You and your team members maintain dialogue with learners' representatives, and seek their advice and guidance on all matters that may concern them.</p> | <p>Letters from learners</p> <p>Notes of meetings with learners' representatives</p> <p>'Audit trail' of responses to student led initiatives</p> |



Your Personal Portfolio

1. Work Sheet A: Flexi-Path Initial Self Assessment Record
2. Work Sheet B: Personal Flexi-Path Portfolio - Evidence Directory
3. Work Sheet C: Personal Flexi-Path Portfolio - Evidence Summary
4. Work Sheet D: Flexi-Path Action Plan
5. Work Sheet E: Personal Flexi-Path Portfolio – Summary

Introduction to the Personal Portfolio

This Part contains two types of material for you to use, loose leaf printed worksheets plus copies on CD.

These alternatives are offered to tie in with a range of adult educators work styles and the resources which may be available to you personally.

The printed sheets can be photocopied for ease of use when written by hand and any variable information can be entered as necessary.

The CD makes it possible to enter information direct from the keyboard and to store many versions of the documents you need on your own computer files.

In either event you will then have the option of producing your own file of paper copies to accompany the evidence that will go into your portfolio. It is not recommended that too many worksheets are copied initially, especially those relating to individual competences. As advised previously, (Section A, Part 2 – How to use Flexi-Path to build a personal portfolio) the selection of items you feel confident about first will help to 'ground' the exercise and help you to form judgements about the way you wish to deal with items you are less sure about.

That evidence itself may of course be scanned and stored on computer memory if you have the necessary facilities. Such an approach would give you the facility to link your competence statements directly to the stored evidence; not an option that the current project has been able to make available.

Therefore, as indicated in the main section of the Toolkit, creating your own index of the documents and other materials to be used as evidence will help keep this process within manageable proportions.

1. Work Sheet A: Flexi-Path Initial Self Assessment Record

Name _____ Organisation _____
 Date commenced _____ Reviewed _____

| Field | Description | Self Assessment Indicate your assessed level against each competence | | | Action Include your own notes, ideas for evidence and so on. Transfer developmental activities to your Personal Action Plan |
|-------|--|---|-------------|-------------|--|
| LRN | Adult Education Learning Cluster | Not met | Level 6 met | Level 7 met | |
| LRN1 | Curriculum and Subject Development – initiate and monitor curriculum design and development. | | | | |
| LRN2 | Personalisation – ensure individual learners are supported to optimise progression and achievement. | | | | |
| LRN3 | Metacognition – initiate and monitor learning and teaching strategies that enable effective individual learning. | | | | |
| LRN4 | Teaching and Learning Methods – ensure that staff and learners engage in activities that promote effective learning. | | | | |

| | | Not met | Level 6 met | Level 7 met | |
|-------|--|---------|-------------|-------------|--|
| LRN5 | Fields of Knowledge – obtain, analyse and apply information. | | | | |
| LRN6 | Learning Resources – ensure sufficient and appropriate assignment of resources to support learning. | | | | |
| LRN7 | Quality Improvement – monitor and evaluate learning programmes, using data for implementing improvement. | | | | |
| LRN8 | Accreditation and Validation – lead on awarding bodies' QA and ensure appropriate accreditation pathways are adopted. | | | | |
| LRN9 | Specialist Subject Knowledge – Maintaining a high level of technical preparedness within your principal curriculum area. | | | | |
| LRN10 | Learner Progression – within and across curriculum and institutional boundaries. | | | | |

| | | | | | |
|------------|---|--------------------|------------------------|------------------------|--|
| LRN11 | Evaluating Learning – Recognising and responding to the challenges for and the successes of learners. | | | | |
| PPL | Adult Education People Cluster | Not met | Level 6 met | Level 7 met | |
| PPL1 | External Relations – maintaining relationships with all stakeholders. | | | | |
| PPL2 | Marketing – demonstrating, in highly visible way, the responsive nature of the organisation to individual and collective adult learning needs. | | | | |
| PPL3 | Learner Engagement – keeping ‘the learner’ as the central concern of the organisation. | | | | |
| PPL4 | Communication – demonstrating that you communicate effectively with all employees within your organisation and in your wider networks. | | | | |
| PPL5 | Information, Advice and Guidance – ensuring that learners individually and collectively are supported to enter, enjoy and progress through and beyond their specific learning activity. | | | | |

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|-------|--|--|--|--|--|
| PPL6 | Context and Community – ensuring that your organisation remains a listening and responsive body, capable of changing to meet local expectations and needs and ensure the organisation is the right place to learn. | | | | |
| PPL7 | Community Development – contributing to empowerment of individuals and groups and enhancing the wider social and economic development of the various communities in the area of benefit. | | | | |
| PPL8 | Diversity and Equality – inclusion, equality of opportunity, intercultural awareness and engagement. | | | | |
| PPL9 | Employer Engagement – maintaining links with human resources and technical experts to ensure a responsive approach to meeting their learning agendas. | | | | |
| PPL10 | Rights, Responsibilities and Restrictions – demonstrate a balanced approach to challenging attitudes and behaviours | | | | |
| PPL11 | Inter-generational Learning – contributing to age-inclusive strategies for adults of all ages that are mutually advantageous for children. | | | | |

| PRT | Adult Education Practice Cluster | Not met | Level 6 met | Level 7 met | |
|------|---|---------|-------------|-------------|--|
| PRT1 | Organisational Strategy – developing a client centred lifelong learning culture within the organisation which responds to political, social and economic issues. | | | | |
| PRT2 | Financial Management – financial planning and budget management. | | | | |
| PRT3 | Accountability – ensuring that the delivery of adult learning in your organisation adheres to local, national and European principles and priorities and identifying and planning for risk. | | | | |
| PRT5 | Premises and Facilities – managing the infrastructure to allow the provision of a quality adult learning service. | | | | |
| PRT6 | Sustainability – balancing protection of the organisation, the local economy and the environment. | | | | |

| | | | | | |
|-------|---|--|--|--|--|
| PRT7 | Leadership – inspiring and leading change within your organisation. | | | | |
| PRT8 | Team Management – leading performance improvement within your team and responding to underperformance. | | | | |
| PRT9 | Staff Development and Appraisal– ensuring your staff explore and reach their potential, managing performance and improvement. | | | | |
| PRT10 | Professional Development – being aware of your own professional development. | | | | |
| PRT11 | Learner Responsiveness - listening and responding to the concerns of individuals and groups of learners | | | | |


Having reviewed each cluster, the direction of my activities will relate mainly to:

2. Work Sheet B: Personal Flexi-Path Portfolio - Evidence Directory

| Reference No. Assign a unique reference number of your choice to each piece of evidence | Description | Competence Reference You may choose to reference a piece of evidence for several competence fields. Record all fields here |
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3. Work Sheet C: Personal Flexi-Path Portfolio - Evidence Summary

| | | | | |
|--------------------|------------------------|--|---------|--|
| Competence Ref: | Competence Descriptor: | | | |
| | | | | |
| Competence Level | Level 6 | | Level 7 | |
| Personal Statement | | | | |
| | | | | |

| | | | | | | |
|-------------------------|---|--|---------|--|---------|--|
| Referencing of Evidence | Rationale for Inclusion | | | | | |
| Mentor's Comments | | | | | | |
| Level Achieved | Not Met | | Level 6 | | Level 7 | |
| Signed by Mentor |  | | | | | |

4. Work Sheet D: Flexi-Path Action Plan - formative development based on self assessment and guidance

| Competence | Knowledge/ skills/ Experience needed | Learning Plan/Activities | Resources and Support Needed | Target Date(s) |
|------------|---|-----------------------------|------------------------------------|-------------------|
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5. Work Sheet E: Personal Flexi-Path Portfolio – Summary

| Personal Details | |
|---|--|
| Name | |
| Organisation | |
| Position | |
| Key responsibilities | |
| Personal Statement: what you feel you have learned through the process of compiling your portfolio. | |
| Overview of personal performance: strengths and weaknesses | |
| Practice Cluster | |
| Learning Cluster | |
| People Cluster | |
| Priority Areas for Development | |
| Mentor Statement | |
| Signed: _____ Name: _____ Position: _____ Organisation: _____ | |
| Date: _____ | |