



Dear Colleague

Are you an innovative, inspirational adult education manager?

Are your skills and competencies given adequate recognition?

Why not validate your performance through a Flexi-Path endorsement?

Gaining a Flexi-Path endorsement of your present performance level could meet your continuous professional development needs.

Flexi-Path is a project of 5 European national bodies and 2 universities that provides a systematic approach to analysing and validating your competence profile and could potentially be used to gain modular credit at Masters level in the higher education sector.

Flexi-Path is an important new approach, funded by the European Commission, which may realise the objectives of the Bologna¹ process in making Higher Education more focused on what learners can do in terms of their skills and experience in employment.

The fact that non-university adult learning already has a notable record of supporting learners in very practical ways is important. It means that being able to carry the processes of endorsement and validation to this higher level will strengthen the position of Adult Learning practitioners as a contribution to the Lisbon Strategy².

In this context we have taken the widest view of informal and non-formal Adult Education, bringing within our definition aspects of broadcasting, librarianship, museum education and E-Learning.

¹ 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. <http://www.ond.vlaanderen.be/hogeronderwijs/bologna/>

² 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/>

The contents of this pack will help you to set out clearly where your strengths lie and give you a framework within which to present the supporting evidence.

It is now commonly accepted that a professional portfolio with analysis and a directory of relevant content, is the most effective tool for the demonstration of high level competences.

A key feature of Flexi-Path is that it will help you to recognise where you are at professionally and to receive endorsement for the expertise you currently demonstrate.

Equally it is a means of identifying elements of your professional practice that you may wish to evidence or strengthen.

The Flexi-Path approach will help you to position yourself within your career by providing the tools to take stock of your competences, receive endorsement of your advanced professional standing and to help you work on aspects you would like to strengthen.

It has been said, wisely, that none of us can show all the aspects of a highly experienced adult educator. Even the greatest leaders have their strengths and weaknesses. Those you have will depend in large part to your personality. However it will also be limited by opportunity, especially in employment, when others have a controlling influence on the scope of your authority.

In terms of career opportunity the designers of Flexi-Path have been very aware of these developmental or 'formative' aspects of undertaking a competence review.

We would hope that most people operating at the EQF levels 6 & 7 will have a sufficiently strong working relationship with their managers (either by seniority or within the controlling board of the organisation) to be able to set their own goals. Even so the opportunities to hold some kinds of brief within the organisation may be limited.

In these circumstances we hope that there will be flexible opportunities, through placements, work shadowing and project management for you as a user of the Flexi-Path pack to add and build on your career profile. We are sure that this will be good for you and good for the organisation you work for.

All good wishes,



On behalf of the Flexi-Path Partnership

The project is developed by seven partners in international cooperation:





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

This project is
funded from the
Lifelong Learning
Programme



www.flexi-path.eu

A Collaborative Project led by the DiE Germany

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A pocket for insertion of media like CDs, flyers, USB cards etc. on the inside of the cover of the folder.

Section A: Flexi-Path Competency Framework

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 The Lisbon Strategy and realising the objectives of the Bologna Process.

What is Flexi-Path?

The Flexi-Path toolkit enables its users to demonstrate their high level work-based competences in the Adult Education field. It has been created and developed by Adult Education professionals throughout Europe to provide a standardised understanding of the competences of an Adult Educator working at a high level within the sector and related occupational areas. Flexi-Path recognises that there are many professionals who have gained their reputations through work experience and not necessarily through academic study.

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.

* 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*:

Basic Skills Director	Head of Public Relations & Marketing
Director of Human Resources	Head of Student Services
Director of Resources	Health Education Unit Manager
Director of Training	Lead Assessor/ Quality Assurance
Funding Agency Director	Learning Centre Manager
Gallery/ Museum Education Officer	Learning Technologies Manager
Head of Community Programmes	Prison Education Manager
Head of Faculty	Strategic Development Team Leader

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.

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 competence at either a Level 6 or Level 7. Each competence statement will describe briefly the type of activities which may be indicative of your competence, based on your work experience. For each competence 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 competence that you are not able to evidence. This may be worth discussing with your Mentor. However, clearly this may be because it is

* Envisaged that this list will be customised to reflect national employment structures

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 mentoring or 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.

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

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. <http://www.ond.vlaanderen.be/hogeronderwijs/bologna/>

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

The Lisbon Strategy

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/>

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 Section 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 (see page) 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.

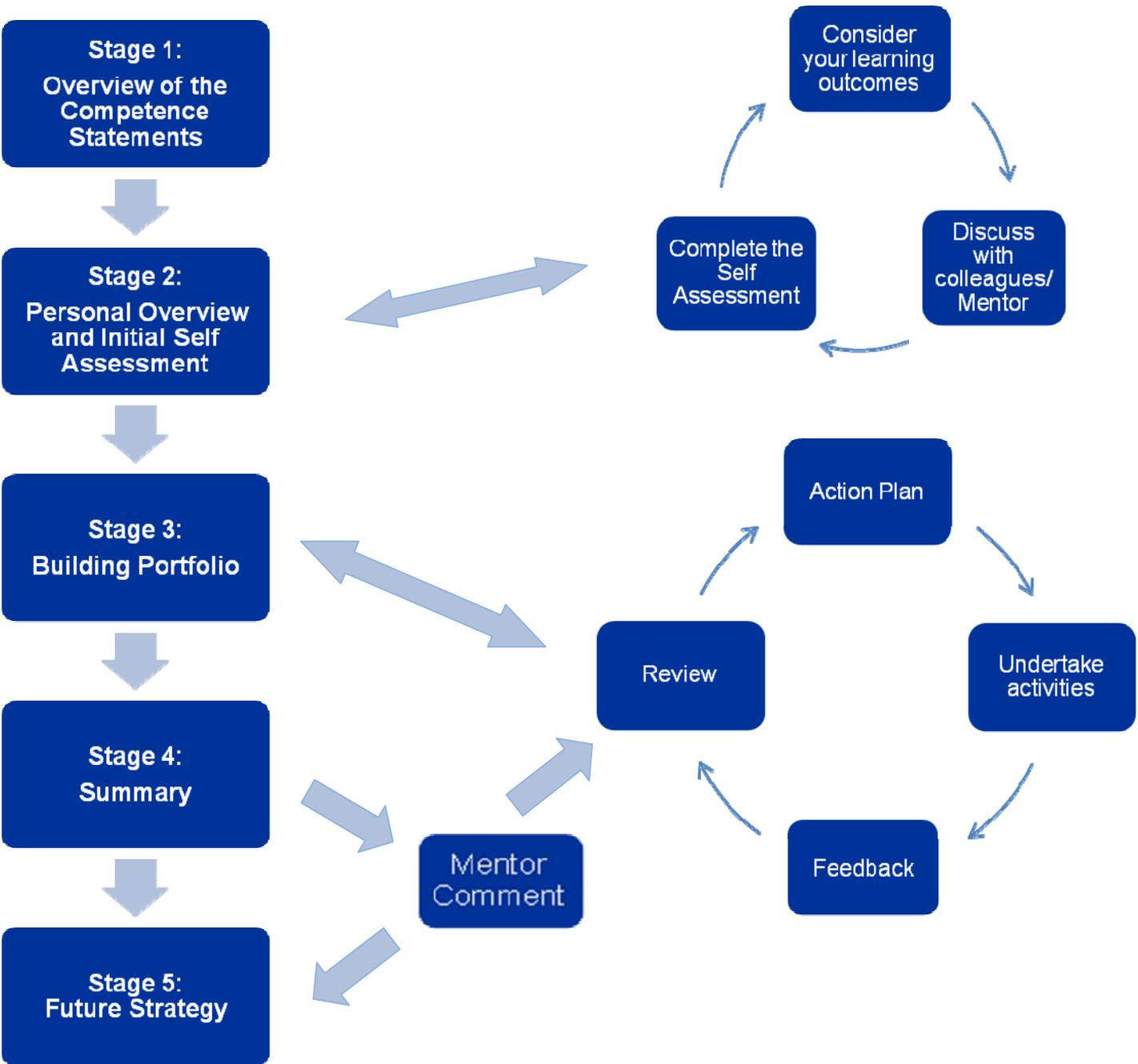
You will need to return to this section later and work from it more systematically when you come to select and present material for your portfolio. It will help you to reference your evidence against relevant competence statements(s).

Stage 2 Personal overview and initial self assessment

You would take the time for personal overview and consideration of what you hope to achieve by undertaking this exercise. In doing this you would determine where each area of the competences in the Flexi-Path document can be identified before being

* *Mentor*: Need to consider the correct term and definition for this person.

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



more thoroughly considered and noting the elements related to your personal experience.

Record your achievements and related thoughts on Work Sheet A: Flexi-Path Initial Self- Assessment Record. 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.

Before you commence on 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 3: Building the Portfolio

Using your personal documents and other evidence:

1. Identify where you can consistently demonstrate your highest performance levels.
2. 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 3 below.

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.

1. 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 2.3.2, you will need to demonstrate the process of your involvement. This may be through evidencing emails/ reports seeking comments on your draft for example and/ or a short descriptive note.
2. 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.
3. 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.
4. 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.

Stage 4 Summary Report

You will summarise your portfolio evidence into a short report which draws attention to your overall strengths and weaknesses and may be endorsed with additional commentary by your mentor.

Stage 5 Future Opportunities

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 this will have had two components;

1. 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.
2. 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 strengths which you have to proceed confidently in these directions.

Key points to remember

(For review at Testing Phase)

An Adult Educator Competence Framework

Practice Cluster

Organisational strategy

Financial Management

Accountability

Programme Development

Premises and Facilities

Sustainability

Leadership

Team Management

Staff Development and Appraisal

Professional Development

Learning Cluster

Curriculum and Subject Development

Personalisation

Metacognition

Teaching and Learning Methods

Fields of Knowledge

Learning Resources

Quality Improvement

Accreditation and Validation

People Cluster

External Relations

Marketing

Learner Engagement

Communication

Information, Advice and Guidance

Context and Community

Community Development

Diversity

Employer Engagement

3. The Competency Framework

Defining Clusters of Competences

In looking through and subsequently using the competence framework you will note that these have been divided into three groups or 'clusters' (Fig. 2). 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 patterns 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 and Level 7

Throughout this document we use the terms Level 6 and 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 and 7 the grade criteria used for competences are: -

EQF LEVEL 6	<p>Manage complex technical or professional activities or projects, taking responsibility for decision making in unpredictable work or study contexts</p> <p>Take responsibility for managing professional development of individuals and groups.</p>
EQF LEVEL 7	<ul style="list-style-type: none"> - 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.

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 professionals practice in the experience of the seven project partners and draws 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 you own geographical area and to check for any significant variations.

Flexi-Path Competency Framework

2.1 Adult Education Practice

Field Reference	Competence
2.1.1	Organisational Strategy
2.1.2	Financial Management
2.1.3	Accountability
2.1.4	Programme Development
2.1.5	Premises and Facilities
2.1.6	Sustainability
2.1.7	Leadership
2.1.8	Team Management
2.1.9	Staff Development and Appraisal
2.1.10	Professional Development

2.2 Adult Education Learning Cluster

Field Reference	Competence
2.2.1	Curriculum and Subject Development
2.2.2	Personalisation
2.2.3	Metacognition
2.2.4	Teaching and Learning Methods
2.2.5	Fields of Knowledge

2.2.6	Learning Resources
2.2.7	Quality Improvement
2.2.8	Accreditation and Validation

2.3 Adult Education People Cluster

Field Reference	Competence
2.3.1	External Relations
2.3.2	Marketing
2.3.3	Learner Engagement
2.3.4	Communication
2.3.5	Information, Advice and Guidance
2.3.6	Context and Community
2.3.7	Community Development
2.3.8	Diversity
2.3.9	Employer Engagement

2.1 Adult Education Practice Cluster

Field Reference	Competence	Level 6 Characteristics	Level 7 Characteristics	Portfolio Evidence Required
2.1.1	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>
2.1.2	Financial Management – financial planning and budget management	<p>You contribute to the financial planning and budget management of the organisation. You have delegated responsibility for managing a budget for your team or area of responsibility.</p> <p>You ensure that the</p>	<p>You contribute to the financial planning and budget management at a high level. You have responsibility for managing a budget for your area of responsibility and have responsibility for budget</p>	<p>Minutes of meetings</p> <p>Financial strategy documents</p> <p>Funding applications</p> <p>Expenditure</p>

		management of the budget responds to the needs of your users and is in line with organisational priorities.	forecasting and negotiation, responding to the needs 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.	Analysis
2.1.3	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.	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. 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. You consider all aspects of risk in the delivery of your	You are responsible for reviewing your organisation’s performance in delivering adult learning. 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. You present performance reports and improvement plans to trustees/ elected representative and other stakeholders. You may respond on your organisation’s behalf to Government consultations	Team meetings Performance Reports Minutes of Meetings Improvement Plans Conference Reports Published journal etc. articles Risk assessments Communication strategy

		<p>service and planned mitigation and communication strategies to deal with adverse scenarios.</p>	<p>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 organisational level. You develop a communication strategy and be responsible for delivering the strategy when necessary.</p>	
2.1.4	<p>Programme Development – achieving a balance of activity that, within available resources, reflects organisational priorities, attracts learners and meets community needs</p>	<p>You show clear evidence that the programming for which you are responsible meets identified needs.</p> <p>You adopt effective staffing strategies to enable colleagues to provide the most effective use of their time in supporting quality learning.</p>	<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 topic 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</p>	<p>Notes of planning meetings</p> <p>Team briefings</p> <p>Course outlines and publicity.</p>

			<p>accordance to identified needs and trends</p> <p>You review the course design against stakeholders' requirements and feedback.</p>	
2.1.5	<p>Premises and Facilities – managing the infrastructure to allow the provision of a quality adult learning service</p>	<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 be 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 to easy use of facilities by both learners and staff.</p>

2.1.6	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>“Save It” posters</p> <p>Notes of meetings with centre for unemployed people</p> <p>Budget forecasts</p> <p>Staff circulars.</p>
2.1.7	Leadership - inspiring and leading change within your organisation	<p>You build and maintain productive working relationships, dealing professionally with any conflicts between colleagues and/ or learners.</p> <p>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.</p>	<p>You demonstrate leadership skills that support high quality creative educational practice.</p> <p>You are responsible for leading and developing change within your organisation, communicating change within the organisation and to the wider stakeholders.</p> <p>You anticipate changes in the internal and external environment and plan to meet them.</p>	<p>360° assessments</p> <p>Minutes of team meetings</p> <p>Project reports</p>

2.1.8	Team Management – leading performance improvement within your team and responding to underperformance	<p>You have built a strong and effective team to deliver your area of service.</p> <p>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.</p> <p>You are aware of the legal frameworks relating to employment and comply with best practice.</p>	<p>You can demonstrate your advanced team management skills, using innovative approaches to inspire and develop your team(s).</p> <p>You engage with individuals and groups to identify challenges to their performance and to take action to support or reorganise their activities.</p> <p>You keep up to date with relevant employment law and maintain effective contact with HR professionals.</p> <p>You promote an environment in which linguistic and cultural differences are valued and appreciated.</p>	<p>Minutes of meetings</p> <p>360° assessments</p> <p>Improvement Plans</p> <p>Workplans</p> <p>Notes relating to Legal Advice</p>
2.1.9	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</p>	<p>You assess the training and development needs of all staff across the team(s) that you have a responsibility for / organisation and develop training plans, agree the content of courses/ providers and establish</p>	<p>Staff workplans</p> <p>Minutes of meetings (all confidential information removed)</p> <p>Policy drafts indicating your involvement</p>

		<p>for resources to meet identified needs. You carry out staff appraisals on a regular basis, assess development needs, agree goals and targets in line with organisational and monitor performance against targets.</p>	<p>alternative methods for supporting staff e.g. mentoring and job shadowing. Monitor progress against the plans. You are responsible for managing a staff appraisal scheme within your organisation. You develop policy and procedures relating to staff training and development. You seek innovative ways to inspire staff and can demonstrate how you have implemented change. You encourage staff to become involved in the identification and planning of their own professional development.</p>	<p>Procedures (indicating your involvement)</p>
2.1.10	<p>Professional Development – being aware of your own professional development.</p>	<p>You take opportunities to develop yourself professionally including undertaking research on adult learning practice, management and leadership. You develop an action plan to develop your competences to level 7.</p>	<p>You contribute to professional knowledge and practice in the adult learning field. You participate in professional networking, participate in peer reviews, initiate research activities and may contribute to</p>	<p>Professional articles Post training course evaluation Mentoring and job shadowing evidence</p>

			<p>professional journals. You seek out evidence of enhanced practice to inform your own development. You use self-review and stakeholder feedback to improve own professional knowledge and practice</p>	
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2.2 Adult Education Learning Cluster

Field Reference	Competence	Level 6 Characteristics	Level 7 Characteristics	Portfolio Evidence Examples
2.2.1	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
2.2.2	Personalisation: ensure individual learners are supported to optimise progression and achievement	You support the teaching and assessment teams to ensure that learners are supported through effective Individual Learning Plans (ILP) and that their progress is monitored throughout their learning journey.	You actively monitor the efficacy of ILPs, discussing and implementing changes when necessary to meet the needs of individual learners and the requirements of awarding bodies and QA processes.	Minutes of meetings Presentation notes/slides Adapted ILPs

2.2.3	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
2.2.4	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 these 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) Individual Learning Plans

2.2.5	Fields of Knowledge: obtain, analyse and apply information	<p>You seek out and review information relevant to current needs and expectations. 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 Intellectual Property Rights and all other legal restrictions in the use of knowledge.</p>	<p>Minutes of meetings Action Plans Reports Protocols Your own Continuous Professional Development record</p>
2.2.6	Learning Resources: ensure sufficient and appropriate assignment of resources to support learning	<p>You ensure that there are sufficient resources for effective learning, including specialist equipment, staff/learner ratios and support staff for special needs. You support the development of flexible learning methods, including blended and e-learning.</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.</p> <p>You advocate flexible learning approaches, including blended and e-</p>	<p>Curriculum descriptors Minutes of meetings Proposals</p>

			<p>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.</p>	
2.2.7	<p>Quality Improvement: monitor and evaluate learning programmes, using data for implementing improvement</p>	<p>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.</p>	<p>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.</p>	<p>Minutes of meetings Communications to teams Benchmarking analyses Moderation grading Inspection findings Staff appraisal reports</p>
2.2.8	<p>Accreditation and Validation: lead on awarding bodies' QA and ensure appropriate</p>	<p>You take an active role in decision making about appropriate awarding bodies, monitoring and supporting</p>	<p>You actively research and liaise with appropriate external agencies to ensure accreditation and</p>	<p>Minutes of meetings QA reports from awarding bodies.</p>

	accreditation pathways are adopted.	accreditation and QA 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.	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.	Communications to staff and to learners Publicity materials Communication with awarding bodies
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2.3 Adult Education People Cluster

Field Reference	Competence	Level 6 Characteristics	Level 7 Characteristics	Portfolio Evidence Required
2.3.1	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
2.3.2	Marketing – demonstrating, in highly visible way, 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' feedback to plan and deliver an effective and attractive offer of learning opportunities within the capacity of the organisation to	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 of your organisation and to demonstrate its effectiveness in exceeding the expectations of current	Publicity strategy Consultation reports/ surveys Marketing products Marketing analysis Business plans, Minutes of Board meetings Analysis of

		<p>deliver. You contribute to departmental and collective publicity strategies and advise on key messages to your anticipated audience.</p>	<p>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.</p>	<p>consistent compliments</p>
2.3.3	<p>Learner Engagement – keeping 'the learner' as the central concern of the organisation</p>	<p>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 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.) You ensure that all arrangements for learner enrolment, accreditation and support services are fit for</p>	<p>You develop innovative approaches to respond to the needs of learners, individually and collectively, and commission learner support services appropriate to learner's needs. You ensure that the learner is central in the development of service improvement plans You are active in meeting learners and getting to know them and their preferences.</p>	<p>Delivery plans Reviews of procedures Complaints and Compliments analysis Case studies Improvement plans</p>

		purpose and operate to maximum effectiveness. You ensure the implementation of all aspects of complaints and disputes resolution, through to external legal procedures.		
2.3.4	Communication – demonstrating that you communicate effectively with all employees within your organisation and in your wider networks.	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. You are available to talk with and support your team at all times.	You actively ensure that all staff within the organisation are kept up to date with all necessary information, through all relevant media. You seek new ways of ensuring that communication within the organisation at all levels is effective and timely.	Meeting minutes Witness testimony
2.3.5	Information, Advice and Guidance – Ensuring that learners individually and collectively are supported to enter, enjoy and progress through and beyond their specific learning activity.	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. You ensure that learners' individual learning styles are responded to and that appropriate resources are deployed to support their learning.	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. You identify opportunities to increase and enhance the availability of IAG to all	Action Plans Improvement Plans Minutes of meetings Service reports/ reviews Case studies

		<p>You ensure that individual learners are supported to identify and work towards their longer-term learning goals.</p>	<p>learners taking account of their diverse abilities and needs. 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>	
2.3.6	<p>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>	<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. You plan activities and opportunities for your team members to interact professionally and socially 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. 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 Workplans Local Action Plans Promotional materials</p>

2.3.7	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	You will 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 individually and collectively. You will help them to locate and utilise appropriate learning resources and expertise as well as to identify and break down barriers to local learning.	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 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.	Minutes of meetings Reports Evidence from database Promotional materials
2.3.8	Diversity – 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	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	Team meetings Action and Improvement plans Minutes form meetings Multilingual documents Reports and investigations Minutes of community consultation meetings Policy

		organisation's enrolment, retention and achievement data to ensure that all learners are fairly represented and supported.	organisation and take active steps to ensure that the organisation's learner profile is representative of the community as a whole.	documentation
2.3.9	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 area 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)

4. Questions and answers

(For review at Testing Phase)

5. Obtaining support and guidance

In undertaking the task of building a professional portfolio for reflection and career development it is recognised that a 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 section 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 and 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.

7. Glossary of terms

(For review at Testing Phase)

8. Bibliography

(For review at Testing Phase)

Section B: Personal Portfolio

Work Sheet A: Flexi-Path Initial Self Assessment Record

Name _____ Organisation _____ Date _____

Field Ref:	Description	Self Assessment			Action
		Indicate your assessed level against each competence			
2.1	Adult Education Practice Cluster	Not met	Level 6 met	Level 7 met	
2.1.1	Organisational Strategy – developing a client centred lifelong learning culture within the organisation which responds to political, social and economic issues				
2.1.2	Financial Management – financial planning and budget management				
2.1.3	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.				
2.1.4	Programme Development – achieving a balance of activity that, within available resources, reflects organisational priorities, attracts learners and meets community needs				

		Not met	Level 6 met	Level 7 met	
2.1.5	Premises and Facilities – managing the infrastructure to allow the provision of a quality adult learning service				
2.1.6	Sustainability – balancing protection of the organisation, the local economy and the environment				
2.1.7	Leadership - inspiring and leading change within your organisation				
2.1.8	Team Management – leading performance improvement within your team and responding to underperformance				
2.1.9	Staff Development and Appraisal– ensuring your staff explore and reach their potential, managing performance and improvement				
2.1.10	Professional Development – being aware of your own professional development.				

2.2	Adult Education Learning Cluster	Not met	Level 6 met	Level 7 met	
2.2.1	Curriculum and Subject Development: initiate and monitor curriculum design and development				
2.2.2	Personalisation: ensure individual learners are supported to optimise progression and achievement				
2.2.3	Metacognition: initiate and monitor learning and teaching strategies that enable effective individual learning.				
2.2.4	Teaching and Learning Methods – ensure that staff and learners engage in activities that promote effective learning				
2.2.5	Fields of Knowledge: obtain, analyse and apply information				
2.2.6	Learning Resources: ensure sufficient and appropriate assignment of resources to support learning				

		Not met	Level 6 met	Level 7 met	
2.2.7	Quality Improvement: monitor and evaluate learning programmes, using data for implementing improvement				
2.2.8	Accreditation and Validation: lead on awarding bodies' QA and ensure appropriate accreditation pathways are adopted.				
2.3	Adult Education People Cluster				
2.3.1	External Relations – maintaining relationships with all stakeholders				
2.3.2	Marketing – demonstrating, in highly visible way, the responsive nature of the organisation to individual and collective adult learning needs				
2.3.3	Learner Engagement – keeping 'the learner' as the central concern of the organisation				

		Not met	Level 6 met	Level 7 met	
2.3.4	Communication – demonstrating that you communicate effectively with all employees within your organisation and in your wider networks.				
2.3.5	Information, Advice and Guidance – Ensuring that learners individually and collectively are supported to enter, enjoy and progress through and beyond their specific learning activity.				
2.3.6	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.				
2.3.7	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				
2.3.8	Diversity – inclusion, equality of opportunity, intercultural awareness and engagement				

		Not met	Level 6 met	Level 7 met	
2.3.9	Employer Engagement – maintaining links with human resources and technical experts to ensure a responsive approach to meeting their learning agendas.				

Having reviewed the points in 2, the direction of my activities will relate mainly to:

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						

