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## VET21001 Report

### Development of the VET21001 Toolkit

Version 2



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4. Skupnost višjih strokovnih šol Republike Slovenije	Skupnost VSŠ	SI
5. Associação para a Educação e Valorização da Região de Aveiro	AEVA	PT
6. Malta College of Arts Science and Technology	MCAST	MT

## Associate partners

The identification of the enlarged VET21001 Community is available at: <https://vet21001.eu/partners/>

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# 1. Introduction

## 1.1 Context

The European Quality Assurance Framework for Vocational Education and Training (EQAVET) was developed and published as a European Parliament and Council Recommendation over a decade ago and evidence shows that Member States have made progress in the implementation of the EQAVET Recommendation to varying degrees. Reasons for this seem to stem from several interrelated causes, one of which being the nature of its high-level guidelines and the toolbox approach, from which organizations can choose what to implement. As ISO 21001 comprises all EQAVET indicative descriptors at VET provider level and provides more detailed requirements specifically targeted to improve educational organizations' processes (including those of VET providers), it could be used to further guide and improve quality assurance at VET provider level.

Hence, VET21001<sup>1</sup> is an applied research project, designed to respond to the problem of the low EQAVET<sup>2</sup> adoption since 2009 and is funded by the ERASMUS+ Programme, in the framework of the European priorities (EU, 2019):

- Sustainable investment, quality and efficiency of education, training and youth systems supporting the development of evidence-based policies and reforms that aim at delivering quality education and training more efficiently;
- Increasing the quality in VET through the establishment of feedback loops to adapt VET provision, in line with the Recommendation on the European Quality Assurance Reference Framework for Vocational Education and Training (EQAVET).

VET21001 has the **Mission** to contribute to a self-sustainable market dynamic, conducive to a widening adoption of the EQAVET criteria (VET21001 Consortium, 2019a) and the **Vision** to contribute to the continuous improvement of European VET and HVET services with worldwide recognition as a brand of excellence (VET21001 Consortium, 2019a).

To accomplish its mission and achieve its vision, the project included five intellectual outputs:

- |     |   |
|-----|---|
| IO1 | Gap analyses of EQAVET Adoption   |
| IO2 | Competence Profiles for EQAVET Professionals  |
| IO3 | Rules for an EQAVET Accredited Certification Scheme   |
| IO4 | "Mastering EQAVET" Curricula  |
| IO5 | "VET21001 <sup>1</sup> " – A Standardized Toolkit for easy EQAVET integrated implementation |

The relationship between these intellectual outputs is illustrated in figure 1 below. This report describes the development of Intellectual Output 5 (IO5).

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<sup>1</sup> At the application phase, the project was named EQAVET+. It was re-named VET21001 after funding approval, by request of the European Commission. See details [here](#).

<sup>2</sup> EQAVET first emerged from the [2009 Recommendation of the European Parliament and Council](#), which invited Member States to use indicative descriptors and indicators to strengthen the quality of VET provision. It was meanwhile substituted by the [2020 Recommendation on vocational education and training for sustainable competitiveness, social fairness and resilience](#). The VET Recommendation describes how EQAVET can be used to strengthen the quality of initial and continuing VET and presents the complete EQAVET framework.

# VET21001

## RELATIONSHIP BETWEEN INTELLECTUAL OUTPUTS

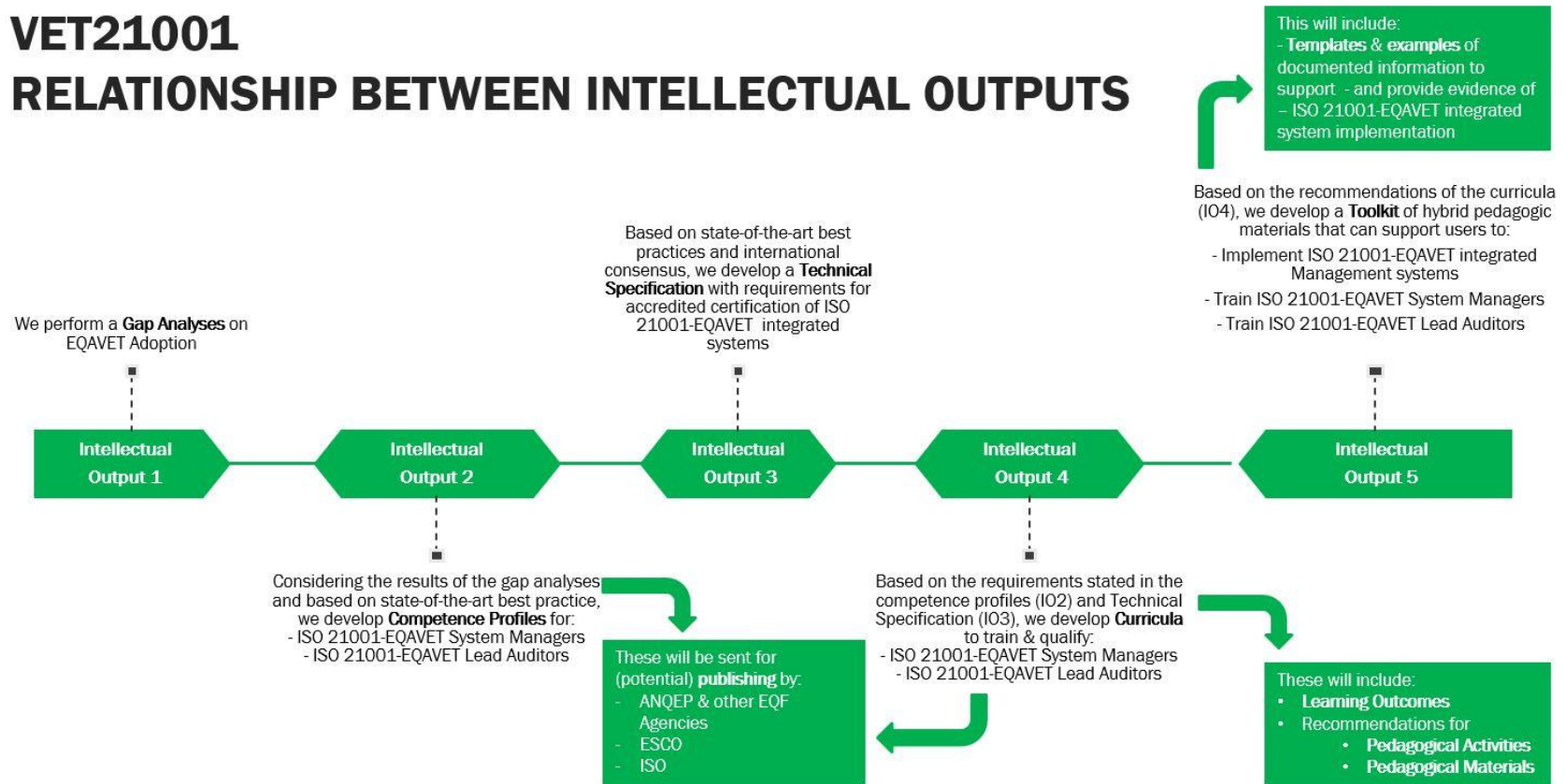


Figure 1

## 1.2 Aims and Objectives of IO5

Based on the results and outcomes of Intellectual Outputs 1–4, the aim of Intellectual Output 5 (IO5) was to develop a toolkit of hybrid pedagogic material including templates and examples to support and provide users with evidence of ISO 21001-EQAVET Integrated Quality Management System implementation, thereby enabling them to:

- Implement ISO 21001-EQAVET Integrated Quality Management Systems
- Train ISO 21001-EQAVET Systems Managers
- Train ISO 21001-EQAVET Lead Auditors

The main aim of this Output was to “*develop a standardized toolkit (VET21001), based on ISO 21001 and targeted to the needs of the stakeholders, to help them adopt and implement the EQAVET Criteria*” (VET21001 Consortium, 2019a).

Through IO5, the consortium aimed to “*provide the market with an open resource that can simultaneously support: 1) EQAVET implementation in educational organizations, by offering practical tools to kick-off and to facilitate the first steps; and 2) the preparation of the EQAVET professionals, as it can be used as pedagogic material during capacity-building programmes...*” (VET21001 Consortium, 2019a).

Annex 2. of the EQAVET Recommendations already provides a number of quality indicators for assessing quality in VET, which can be used to support the evaluation and quality improvement of VET systems and/or VET providers. Basically, this annex lists a number of suggested input and output KPIs – i.e., **what** needs to be measured.

As stated in the application, the innovative aspects of the toolkit, such as the ISO 21001 approach and the practicality of its content, are expected to raise curiosity in the educational sector and, consequently, awareness and appetite in the educational organizations, the intended users, thereby increasing EQAVET adoption. By involving associate partners involved in European and International networks, who support the project by disseminating its intellectual outputs, the infrastructure for transferability potential is assured.

Some examples of what the VET21001 Toolkit could include were:

- Frequent asked questions (FAQ) and objective, practical replies to them;
- Leadership documents to boost corporate identity, such as mission and vision statements; quality principles and policy statements; quality objectives and methodologies to define, monitor and achieve them;
- Strategic approaches to manage risk and sustainability, such as methodologies to identify and monitor internal and external contexts; stakeholders’ needs and expectations; non-conformities, risks and opportunities;
- Methodologies to manage resources efficiently, including infrastructure, knowledge and people;
- Tools and techniques to tackle the most challenging operational activities in education, such as: Continuous updating of the curricula towards market needs; Continuous development of teaching staff towards technical and scientific developments; Student-centered activities considering the whole spectrum of special needs - from disability to giftedness; Fitness for purpose of the assessment of learning instruments; and, Reliability of the summative assessment process as a whole.

## 1.3 Adaptations

The carrying out of face-to-face workshops and meetings, as well as fora, within which to discuss, identify and review the outcome of any tests and validation carried out on the individual tool-kit elements, was challenged by the aftermath of the epidemic situation and the organization of such was deemed to be better served through online platforms. Notwithstanding, the consortium still managed to organize two hybrid, face-to-face and online, Transnational Project Meetings, in Portugal and Italy, during the period of time dedicated to IO5.

Over the life of the project, the VET 21001 consortium successfully worked to deliver the objectives of the application. Additionally, the outputs of this work were taken up by the International Organization for Standardization (ISO).

Having fully delivered three outputs and working on finalizing the 4<sup>th</sup> and 5<sup>th</sup> outputs, whilst giving direct input into EC policy-and-decision-making through the close involvement of EC representatives in the work of the project, and being nominated for a major international award, the project timeframe had to be adjusted, with the full collaboration of the consortium, to accommodate all this extra commitment. Hence, an extension of the project VET201001 period of an additional four months to provide valuable outputs in terms of quality, efficiency and take-up provision, was requested.

This extension was granted on the basis of the consortium highlighting IO5 as the key output since VET21001 – A Standardized Toolkit for easy EQAVET integrated implementation merges the content of previous outputs, providing an innovative toolkit to use ISO 21001 in support of EQAVET implementation. This was justified by the consortium's commitment to channeling all efforts to delivering the quality output and assure its readability, usefulness and take up by stakeholders. The extension provided the consortium with the possibility to deliver this project successfully and to its full potential.

## 1.4 Glossary

Given the high technicity of the subject, the proliferation of definitions for the same terms often used in the sector, and different meaning some of the terms have in colloquial discourse, which tends to confuse new users, the VET21001 Consortium decided to include an additional element in Toolkit, not anticipated at the application phase: A Glossary. It has worked on the construction of a common terminology, based on a selection of sourced terms and definitions agreed upon for the purpose of this document. The glossary may be viewed in products of this intellectual output, IO5, in particular, the *e-book* in PDF format, which is appended to this report; and at the VET21001 website, where it is also available in html format.



# 2. Method: Toolkit Development

## 2.1 VET21001 IO5 Development Overview

Since the aim of IO5 was to develop and validate a Standardized toolkit called VET21001 based on ISO21001, targeted to the needs of stakeholders to help them adopt and implement the EQAVET Criteria, an exercise to compare both standards and group their various clauses into Cluster Themes was carried out. Based on these cluster themes, the Consortium agreed to hold practically weekly meetings and a series of online Workshops to discuss each Cluster and select the tools they considered as most appropriate to be added to the Toolkit.

A Calendar marking the phases for the execution of Output 5 and a cluster distribution document were raised, with the assistance of KIC. The calendar and the cluster distribution documents are annexed to this report and were disseminated amongst the project partners. The details of the Calendar were as follows:

Phases	Description of each phase
Initial Discussion & Contributions	Consortium Partners meet to discuss their understanding of the EQAVET Criteria and matching ISO 21001 Requirements. Consortium partners that are educational organizations share how they address criteria/requirements in their organizations. KIC provides counselling based on the experience of leading the development of ISO 21001 and ISO TS 21030. All contribute with ideas and examples for Toolkit Elements related to the theme cluster under discussion.
Consensual choice/development	Consortium Partners meet to analyze and discuss the contributions received and consensually decide which will be those selected for inclusion in the VET21001 Toolkit.
Internal Piloting (2 weeks)	Consortium partners that are educational organizations will test the chosen elements in their organizations. This can be done by either real-life testing where the IO timeframe permits, or via a risk-assessment approach where the timeframe does not permit real-life testing. Feedback on the results of testing will be provided via a pre-defined standardized survey.
External Consultation (1 week)	Associate partners will be invited to review and test the VET21001 Toolkit elements. Feedback on the results of testing will be provided via a pre-defined standardized survey.
Improvement (2x1 week)	Consortium Partners will analyze the feedback received and consensually decide which improvements need to be done in the VET21001 Toolkit elements. MCAST will implement the resolutions.
Publishing (2 weeks)	MCAST and KIC will put the final content of the VET21001 Toolkit into design format and publish it as an ISBN document. The VET21001 Toolkit will also be published via the VET21001 website.

The final VET21001 IO5 Workshop and Development Calendar was universally approved by the consortium.

## 2.2 VET21001 IO5 Development of the Toolkit

Project partners were asked to review the table for the description of the Cluster in terms of ISO Requirements (depicted on the previous page) and requested to start identifying any elements from their own organizations' Quality Management System(s) which may be proposed as examples/evidence of good practice to address such requirements, for consideration of inclusion in the VET21001 Toolkit.

All documentation proposed by Partners for this purpose was to be submitted to the Project's shared folder within Dropbox. As the Output Leader, apart from participating actively in the described tasks, MCAST was also in charge of coordinating the evidence submission process.

In order to help organize partners' contributions, MCAST prepared the following linked tools:

1. **VET21001 Toolkit – Partner Contribution Log:** a spreadsheet in which partners could include the title of the selected tool they were submitting as evidence for a specific item in a particular Cluster Theme, hence, related to specific Cluster Theme items. The spreadsheet was placed within the Dropbox repository as a shared document, so that each partner could update it as and when needed.
2. **Evidence Repository:** a folder system of 10 folders (1 per Cluster), each containing a set of 6 subfolders (1 per partner organization), which were to be used as repositories for submitted evidence.
3. **IO5 Tool Testing Evaluation Form:** a form for the reporting of the internal tool testing/validation process. All partners tasked with the testing of specific tools were requested to report their feedback via this common form which asked partners to:
  - a. report whether they encountered any difficulties while testing;
  - b. explain whether they felt the need to apply any changes to the document;
  - c. describe what added value they felt the tool provided for their institution and/or other institutions within their similar context
  - d. rate the relevance of the tool towards the implementation of the EQAVET criteria and corresponding ISO 21001 requirements (1 not relevant - 10 very relevant).

The form was administered via MS Forms and may be reviewed at:

[https://forms.office.com/Pages/ResponsePage.aspx?id=tutbJeivRU2sydx93JR5\\_ltb0WPbKhtLlb8C-VO1zKZUME9NUTJDMkMxU1ZMTVVNOFc5Q0xANUdBRC4u](https://forms.office.com/Pages/ResponsePage.aspx?id=tutbJeivRU2sydx93JR5_ltb0WPbKhtLlb8C-VO1zKZUME9NUTJDMkMxU1ZMTVVNOFc5Q0xANUdBRC4u)

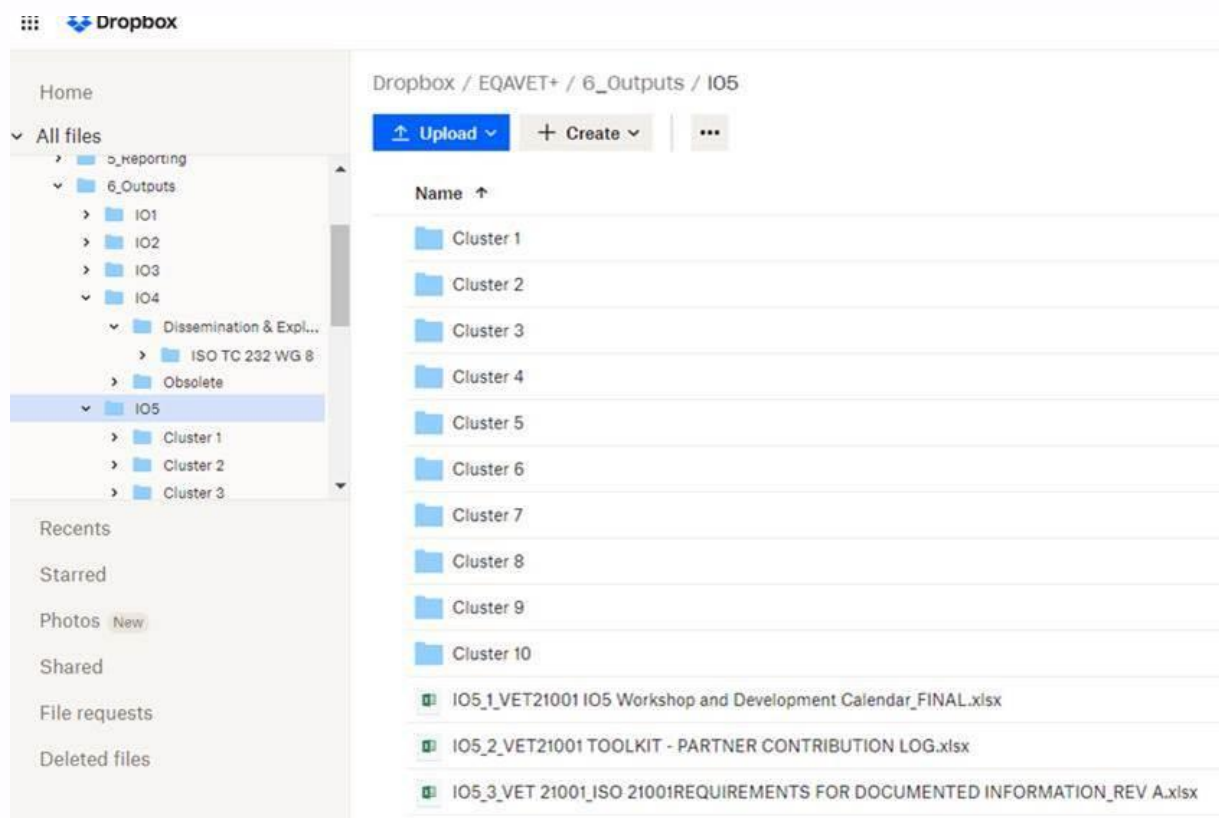
## 2.3 VET21001 IO5 Status Summary

As part of its Output coordination duties, MCAST provided partners with periodical updates in order to keep them informed of the developmental situation at a given point in time. Typical samples of such Status Summaries are outlined below. Such notifications were sent via email to all members involved in the project within the various partner institutions.

### Status Summary 1

“As shown in the graphic below, we have uploaded under shared folder IO5 three main documents as follows:

- **IO5\_1\_VET21001\_Workshop and Development Calendar:** Provides the workshop schedule and the respective ISO/EQAVET references for the respective clusters.
- **IO5\_2\_VET21001\_Toolkit Partner Contribution Log:** All partners are invited to include in this worksheet a log of samples that can be identified/developed as part of the toolkit from your own and/or best practices from other organizations.
- **IO5\_3\_VET21001\_Guidance document for Documented Information:** This document has been compiled by MCAST and will be explained during the Workshop.



In the shared folder 'Cluster 1', MCAST has uploaded a number of the actual samples (documents, policies, tools) that are being proposed for further discussion during the workshops. All Partners are invited to upload their own material (or from other best practices) for discussion during the workshops”.

## Status Summary 2

“I kindly remind you to start uploading the material (tools and results) for the next scheduled Cluster Workshop, namely:

Cluster Theme	EQAVET	ISO 21001
Quality and Risk Management and early warning systems	1.8, 2, 3.4	4.4, 5.1.2, 6.1.1, 6.3, 8.1.1, 8.7

Please also update the ‘Toolkit – Partner Contribution Log’ that cross-refers to the material uploaded.”

Where the E-book was concerned, its structure was the subject of lengthy and detailed discussion by the consortium both during online meetings and via constant electronic communications in the interim as well as during the Transnational Partners’ Meetings. These discussions, which led to unanimous agreement as to the way forward, were led by MCAST.

## 2.4 VET21001 IO5 Workshops/Meetings Overview

It was decided that IO5A1-IO5A3 will be tackled in parallel via a series of consultative workshops and meetings, guaranteeing the collaborative development of the tools, during which all partners met to:

- a. Share best practices from their organization for the fulfilment of specific EQAVET and ISO 21001 standard clauses that were combined into a series of cluster themes.
- b. Propose potential elements/tools that best address the needs of the specific clauses;
- c. Assign tools to educational institutions within the Consortium (AEVA; IPTRANS; MCAST and ERIFO) for piloting and,
- d. Validate the feedback provided as a result of piloting and select the tools for inclusion within the Tool-Kit.

A typical workshop agenda sample is outlined below:

### IO5 – WORKSHOP 2 AGENDA

Date: 14th April 2021

Time: 11:00am – 1:00pm CET

Item 1 – Interpretation of ISO clauses (Workshop 1 remaining clauses and Workshop 2) – KIC

Item 2 – Presentation of the 1st draft of IO5 Working Document Feedback form partners - MCAST

Item 3 – Explanation of the ‘Evidence Description Form’ to be filled-in by Partners / Way forward - MCAST

Item 4- Sharing of filled-in sample of Tool from Workshop 1 and mapping of specific ISO to EQAVET clauses - MCAST/KIC

Item 5 - Quick overview of uploaded material for Workshop 2 - All Partners

In anticipation of the workshops, a summary of the ISO21001 headings forming the Cluster Theme to be addressed would be forwarded to the consortium members involved, as outlined in the example below.

<b>Cluster Theme</b>	<b>ISO 21001</b>
Organizational Context, Leadership and Strategy (Mission, Vision, Policy/ies, Goals/ Objectives)	4.1 Understanding the organization and its context
	4.2 Understanding the needs and expectations of interested parties
	4.3 Determining the scope of the management system for educational organizations
	5.1 Leadership and commitment
	5.2 Policy
	6.2 Educational organization objectives and planning to achieve them
	8.2.1 Determining the requirements for the educational products and services
	8.3.4 Design and development controls

Once the selection and evaluation of the various tools was complete, plenary sessions involving all partners continued to be held. The aim of these sessions was to analyze the feedback received and consensually decide which improvements need to be applied to the VET21001 Toolkit Elements. As Intellectual Output leader of IO5, MCAST implemented such resolutions.

# 3. IO5 Contents & Results

The VET21001 Toolkit is presented in another two formats: as an *e-book* (PDF) and a website (html) to render the toolkit as user friendly as possible.

## 3.1 VET21001 Toolkit represented as an *e-book*

To be faithful to the toolkit contents, the consortium decided that the *e-book* would consist of

- an overall structure including a general introductory section followed by
- 10 sections, one per cluster theme, which:
  - were prefaced by an introduction describing the cluster theme addressing the specific EQAVET Criteria supported by ISO21001 requirements;
  - included descriptions of all the tools sourced, identified as fitting, tested, verified and validated as effective in supporting the implementation of EQAVET Criteria;
  - were followed by a glossary delineating the definition of the pertinent terminology and their sources.
- Once the various sections were populated as outlined in the foregoing, they were reviewed by different members of the consortium.

As a finished product: the *e-book*,

- has been articulated on the site in a digitally navigable version (which can be browsed either by Cluster, and hence it directly mirrors the structure of the e-Book itself, or by element, which allows the user to browse the toolkit by Glossary; Templates; Guidelines; Use Cases and the e-Book)
- consists of twenty-nine (29) templates that have been developed and validated,
- includes descriptive notes and legends for each of the templates and
- comprises completed examples, use cases for most of the tools, for ease of reference.

## 3.2 The VET21001 Toolkit represented as a website

The development and production of the *e-book* was paralleled by a discussion on the layout of the VET21001 website, which was led by KIC. The discussion was focused on the relationship between the website and the *e-book* with universal agreement being arrived at on the following.

- The website and *e-book* should both appear to be and actually be a homogeneous tool to be used and referred to in tandem, whereby one should mirror and reflect the other
- The website would offer the user the facility to review the tools by Cluster and/or by Element, according to the needs of the user and
- Tools were to be uploaded and available both as templates for users to access and adopt/adapt as necessary and use cases, i.e., samples of completed templates as examples for users to follow when compiling their own.

### **3.3 Branding of the Tools and e-book**

Moreover, the consortium decided to brand the tools. Tool Branding was carried out by Skupnost VSŠ members of the consortium. They designed and presented a number of branding samples, which the partners discussed and voted on thereby deciding on the eventual branding of the tools on two counts, i.e., the templates as differentiated from the use cases.

- The templates were aligned with the VET21001 branding as designed by Skupnost VSŠ, while
- The use cases will continue to sport the original partner institution branding from whence the tool was tested.

Finally, for O5A4, MCAST and KIC, with the input of Skupnost VSŠ coordinated the publishing of the toolkit as an ISBN on the project website.

# 4. Monitoring and Evaluation

Following the division of work outlined in the previous sections and the delineation of the tasks leading to the production of the intellectual output, the applied methodology also included monitoring and evaluation as described below.

## 4.1 IO5A1

In planning the execution of IO5A1, the first step to creating the VET21001 Toolkit, the consortium took the results of IO1, IO2, IO3 and IO4 as inputs and analyzed them. This analysis formed the basis of the design and development of the VET21001 Toolkit. Particular attention was placed on the constructive criticism, criteria interpretation and implementation difficulties identified during IO1, as well as the pedagogic needs in terms of supporting materials identified in IO4. As a result of this analysis, the consortium took decisions as to the approaches, methodologies, guidelines and supporting documented information that were to be used and included in the VET21001 Toolkit.

What was initially planned, as well as any adaptations made and results obtained, is described below.

Planned	Adaptations & Results
The Consortium will identify the approaches needed by educational organization staff (quality officers) responsible for quality to implement the EQAVET criteria.	No adaptations were needed. The consortium identified the approaches for ISO 21001-EQAVET application based on the constructive criticism, criteria interpretation and implementation difficulties identified during IO1, IO2 and IO3, as well as the pedagogic needs in terms of supporting materials identified in IO4.
The Consortium will identify the methodologies needed by educational organization staff (quality officers) responsible for quality to implement the EQAVET criteria.	No adaptations were needed. The consortium identified the methodologies for ISO 21001-EQAVET application based on the constructive criticism, criteria interpretation and implementation difficulties identified during IO1, IO2 and IO3, as well as the pedagogic needs in terms of supporting materials identified in IO4.
The Consortium will identify the guidelines and supporting documented information needed by educational organization staff (quality officers) responsible for quality to implement the EQAVET criteria.	No adaptations were needed. The consortium identified the guidelines and supporting documented information for ISO 21001-EQAVET application based on the constructive criticism, criteria interpretation and implementation difficulties identified during IO1, IO2 and IO3, as well as the pedagogic needs in terms of supporting materials identified in IO4.
<b>Activity Target:</b> NA	NA

### Activity Monitoring Indicators:

Consistency with the results of IO1, IO2A1 and IO4

The contents of the IO5A1 planning stage of the VET21001 Toolkit are consistent with IO1, IO2A1 and IO4.



## 4.2 IO5A2

In drafting the VET21001 Toolkit based on the planning stage in IO5A1 and the guidelines contained in ISO 21001, the consortium developed a set of documents to support the implementation of EQAVET such as templates and compiled/completed examples, called 'use cases' of same, including:

- Leadership documents to boost corporate identity, such as mission and vision statements; quality principles and policy statements; quality objectives and methodologies to define, monitor and achieve them, which are located in clusters 1. Leadership & Strategy, 2. Quality & Risk Management, 9. Analyses & Evaluation and 10. Review & Improvement of the VET21001 Toolkit;
- Strategic approaches to manage risk and sustainability, such as methodologies to identify and monitor internal and external contexts; stakeholders' needs and expectations; non-conformity, risks and opportunities, which are located in clusters 1. Leadership & Strategy, 2. Quality & Risk Management, 5. Involvement of Stakeholders, 9. Analyses & Evaluation and 10. Review & Improvement of the VET21001 Toolkit;
- Methodologies to manage resources efficiently, including infrastructure, knowledge and people, which are located in clusters 4. Knowledge and Human Resources, 5. Involvement of Stakeholders, 6. Partnerships & Providers, 7. Infrastructure & work environment, and 8. Design & Delivery of Services of the VET21001 Toolkit;
- Tools and techniques to tackle the most challenging operational activities in education, such as continuous updating of the curricula towards market needs; continuous development of teaching staff towards technical and scientific developments; student-centered activities considering the whole spectrum - from disability to giftedness - of special needs; the fitness for purpose of the assessment of learning instruments and the reliability of the summative assessment process as a whole, which are located in clusters 4. Knowledge and Human Resources, 5. Involvement of Stakeholders, 6. Partnerships & Providers and 8. Design & Delivery of Services of the VET21001 Toolkit; and,
- Tools to perform internal audits, including tools by which to plan the audit, record any findings and report accordingly, which are located in clusters 2, Quality & Risk Management, 3. Data Protection & Control, 9. Analyses & Evaluation and 10. Review & Improvement of the VET21001 Toolkit.

The VET21001 Toolkit is structured in ten thematic clusters, each mapped to EQAVET criteria and ISO 21001 requirements related to them. Inside each cluster, the information is structured in the following way:

- Cluster name
- Cluster introduction
- Matrices towards EQAVET criteria and ISO 21001 requirements
- List of tools related to the theme, with links to their templates in editable format
- List of use cases, in the form of filled templates with real information from testing partners, with links to download them
- In some cases, also guidelines related to the theme and links to useful external resources.

The VET21001 Toolkit was published in two formats:

1. An open resource, downloadable e-Book in PDF Format divided by cluster, showing a list of tools assigned to that particular cluster with links to the Project website, and
2. A web-based, open resource application, which can be navigated either by Cluster or by Element.

The VET21001 Toolkit is available at the following links:

1. E-book version - <https://vet21001.eu/vet21001-e-book/>
2. Website version - <https://vet21001.eu/vet21001-toolkit/>

What was initially planned, as well as any adaptations made and results obtained, is described below.

<b>Planned</b>	<b>Adaptations &amp; Results</b>
The Consortium will design the VET21001 Toolkit in the form of a manual divided in thematic chapters and composed of independent elements that users will be able to easily find and extract according to their particular needs at any given moment.	The only adaptation implemented was an upgrade to the original intentions planned by the project. To this end, the VET21001 Toolkit is also available in HTML format as a browsable online tool at the project website
	The consortium identified the thematic clusters and designed the VET21001 Toolkit accordingly.
The Consortium will develop the VET21001 Toolkit by sourcing and reworking a set of documents to support the implementation of EQAVET such as templates and compiled/completed examples of same.	No adaptations were needed. The consortium sourced and developed documents, including use- cases to support the implementation of EQAVET such as templates and compiled/completed examples of same.
The Consortium will draft the VET21001 Toolkit with Open Source access in such a way that users will be able to easily find and extract the pertinent documentation according to their particular needs at any given moment.	No adaptations were needed. The consortium drafted the VET21001 Toolkit with Open Source access in such a way that users will be able to easily find and extract the pertinent documentation according to their particular needs at any given moment. The way the content is structured also fits the needs of bodies responsible for conformity assessment in educational organizations.
<b>Activity Target:</b> NA	NA
<b>Activity Monitoring Indicators:</b>  Consistency with the results of IO1, IO2A1 and IO4	<input checked="" type="checkbox"/> The contents of the IO5A2 design and development stage of the VET21001 Toolkit are consistent with IO1, IO2A1 and IO4.

## 4.3 IO5A3

In validating the VET21001 Toolkit educational organization Partners in the consortium tested a sample of the VET21001 Toolkit elements on their own organizations and provided feedback on the experience which they inputted in a standardized form provided by the project leader to enable comparative analysis and lead to more solid conclusions. This allowed the consortium to verify and validate the effectiveness of the VET21001 Toolkit prior to its publication. Compilations of feedback forms are annexed to this report.

For the testing and validation phase, partners were allowed to select the approach which best suited the specific tool i.e., either real-life testing where the IO timeframe permits, or via a risk-assessment approach where the timeframe does not permit real-life testing. Feedback on the results of testing was then provided via a pre-defined standardized survey through the use of the IO5 Tool Testing Evaluation Form which was referred to in Section 3.1 above.

What was initially planned, as well as any adaptations made and results obtained, is described below.

Planned	Adaptations & Results
The consortium will test a sample of the VET21001 Toolkit elements on their own organizations.	In some cases, partners were allowed to follow a risk assessment approach rather than a live test case. The educational institutions comprising the consortium partners tested a sample of the VET21001 Toolkit elements on their own organizations or carried out a risk assessment, when appropriate.
The consortium will provide feedback on the experience in a standardized form provided by the project leader.	No adaptations were needed.  The educational institutions comprising the consortium partners provided feedback that enabled comparative analysis and led to more solid conclusions.
The consortium will verify and validate the effectiveness of the VET21001 Toolkit prior to its publication.	No adaptations were needed.  The feedback provided in the standardized form permitted the consortium partners to verify and validate the effectiveness of the VET21001 Toolkit prior to its publication.
<b>Activity Target:</b> 4 pilot implementations in 3 countries	Target met and exceeded. Templates of the VET21001 Toolkit was piloted by 12 VET organizations (4 from the initial consortium and 8 from the enlarged community of associated partners) in 4 countries. The pilot generated 57 use cases (46 from the initial consortium and 11 from the enlarged community of associated partners). These were also published to enrich the Toolkit.

### Activity Monitoring Indicators:

- Number of pilot implementations;
  - 12 pilot implementations, generating 57 use cases:  
AEVA (8) ERIFO (16) IPTRANS (8) MCAST (14)  
Agrupamento de Escolas de Aveiro (1), EA (1), Akademie AC (1), EsproDouro (3), Escola Profissional do Montijo (1), EPI (1), ETAP (1), Insignis (1), Val do Rio (1)
- Localization of the pilot implementations
  - 4 Countries: Italy (ERIFO), Malta (MCAST), Mexico (Akademie AC), Portugal (AEVA, IPTRANS, EPM, ETAP, EPI, VDR, AEA, ED, Insignis)

## 4.4 IO5A4

In publishing the VET21001 Toolkit, the consortium published the VET21001 Toolkit with an ISBN on the project website as open resource for download by users and recommended that the EQAVET Network does likewise.

Each partner disseminated the VET21001 Toolkit through their networks, including their national agency/organization(s) responsible for EQAVET implementation. This created awareness and interest in the project's outputs and led to the onboarding of many associated partners (see section 5.2 of this report).

What was initially planned, as well as any adaptations made and results obtained, is described below.

Planned	Adaptations & Results
<p>The consortium will publish the VET21001 Toolkit.</p>	<p>The consortium published The VET21001 Toolkit in two formats: HTML and PDF.</p> <p>The adaptation made was the extra publication in HTML, as only the PDF version was envisioned at the application phase.</p>
<p>Each partner in the consortium is to contact their national agency/organization(s) responsible for EQAVET implementation and offered them the VET21001 Toolkit, recommending its dissemination through their own networks and media channels.</p>	<p>No adaptations were needed.</p> <p>Each partner disseminated the VET21001 Toolkit through their networks, including their national agency/organization(s) responsible for EQAVET implementation. This created awareness and interest in the project's outputs and led to the onboarding of many associated partners (see section 5.2 of this report).</p>
<p><b>Activity Target:</b> 1 publication</p>	<p>Target met and exceeded.</p> <p>The VET21001 Toolkit generated two different publications, one in HTML and one in PDF.</p>
<p><b>Activity Monitoring Indicators:</b></p>	
<p>1. Availability of the Toolkit via the project website;</p>	<p><input checked="" type="checkbox"/> The VET21001 Toolkit is available at the project website in HTML and PDF.</p>
<p>2. Number of organizations to which the consortium sent the VET21001 Toolkit for re-publication and adoption</p>	<p><input checked="" type="checkbox"/> The VET21001 Toolkit was sent to 36 organizations.</p>

# 5. Dissemination and Exploitation

## 5.1 Distribution of the VET21001 Toolkit

This Intellectual Output, IO5 - VET21001 Toolkit, is interesting to a local, regional, national, European and international audience, as it facilitates the implementation of the EQAVET criteria and is disseminated as such on two parallel planes.

- a. As part of IO5, IO5A4 specifically involved the distribution of the VET21001 Toolkit, i.e., the consortium carried out its commitment to publish the VET21001 Toolkit with an ISBN on the project website, including the HTML version, as an open resource for download by users and recommends that the EQAVET Network does so too.
- b. Each partner also fulfilled their commitment to contact their national agency/organization(s) responsible for EQAVET implementation and offered them the VET21001 Toolkit, recommending its dissemination through their own networks and media channels. In addition, partners also shared the tools with individual schools within their region and context, and requested their input on the validity of the tools, thus involving them in the VET21001 toolkit on multiple levels.
- c. Simultaneously, dissemination activities were carried out by the consortium, whereby partners made use of all the media and communication channels available to them, such as features in the local printed, online and TV media stations that provide promotional coverage of their activities, their presence on Face-book, Twitter and Instagram; hosting on-site press conferences and media events to cover events and project launches/closures where possible and via news-releases, direct promotion, academic promotion, promotion at national and international events of the project website for the effective and efficient dissemination of the project Intellectual Outputs to third parties.

## 5.2 Onboarding more Associated Partners

The VET21001 Consortium made, since the project inception, a strong effort to onboard associate partners that could support the project through their expertise and networks, to assure a sturdier validation of outputs and their transfer into the market, through wider dissemination and exploitation.

At the project application phase, IPQ, the Portuguese national standardization body, ANQEP, the Portuguese national Agency for EQAVET; and ISO/PC 288/WG 1 were involved.

During the development of intellectual output 3 (IO3), a few more associate partners were involved. They were ACCREDIA, the Italian National Accreditation Body; ACCM America, a Mexican Certification Body; VALOR@, a Mexican Consultancy company with expertise in accreditation, which collaborates often with EMA, the Mexican National Accreditation Body; and ISO CASCO JWG 58, which was created by ISO to further exploit IO3 as ISO TC 21030.

Following the tradition, during the development of IO4 and IO5, the consortium onboarded the following additional associate partners:

- Turkish Ministry responsible for education and training sector
- COAE, an Indian accredited certification body

- SMG, a Canadian accredited certification body
- CTA, a Lebanese consultancy and training company
- Progressus Consult, a French consultancy and training company
- Incession, a German consultancy company
- Life School, a German company that provides educational services
- ValdoRio, a Portuguese VET school
- Unindustria Perform, an Italian VET provider and consultancy company, regional representative of Confindustria
- Insignis, a Portuguese consultancy and training company
- Tazkiah, a Lebanese company that provides learning and development consultancy and training services
- EETFP-BTP, a Mauritanian public VET school
- Agrupamento de Escolas de Aveiro, a Portuguese public organization that provides educational services, from pre-school to secondary school level
- Akademie AC, a Mexican cVET provider
- EsproDouro, a Portuguese VET school
- ISO/TC 232/WG 7 Revision of ISO 21001
- ISO/TC 232/WG 8 Auditing Practices Group

This group expanded significantly the geographic scope of the VET21001 community, which now covers four continents (Europe, America, Africa and Asia) and twelve countries (Canada, France, Germany, India, Italy, Malta, Mauritania, Mexico, Lebanon, Portugal, Slovenia, Turkey), as well as an international organization with a global reach (International Organization for Standardization (ISO)). Figure 9 below shows the logotypes of this enlarged consortium. The letters of endorsement from these Associated Partners, in which they describe how they will support the VET21001 project and the VET21001 community, can be retrieved from the website.

The screenshot displays the VET21001 website interface. On the left is a navigation menu with the VET21001 logo and links for Toolkit, Curricula, Competence Profiles, Protocol, Reports, Community, About the Project, and Contact Us. The main content area is titled 'Consortium Partners' and 'Associate Partners'. The Consortium Partners section includes logos for EFPA, SKUPNOST VŠŠ, Knowledge Innovation Centre, AIEVA, IPTRANS 25, and MCAST. The Associate Partners section includes logos for IPO, ANQEP, ACCREDITIA, ACCM, CEAIE, VALOR, akademie ac, INCESSION, Perform, PROGRESSUS CONSULT, Agrupamento de Escolas de Aveiro, EETFP-BTP, insignis, Tazkiah, VR, smg, LIFE SCHOOL, CTA, esproDOURO, ISO/TC 232/WG 7, ISO/TC 232/WG 8, and ISO/TC 232/WG 9. A footer contains project information, funding details from the European Commission, and the Erasmus+ Programme of the European Union logo.

## 5.3 International Dissemination and Exploitation

Over the life of the project, the VET 21001 consortium successfully worked to deliver the objectives of the application. Additionally, the outputs of this work were taken up by the International Organization for Standardization (ISO).

A significant milestone, based on the VET21001 Protocol (IO3), at the VET21001 project level and, also, at the international level was the development of ISO TS 21030: Educational organizations — Requirements for bodies providing audit and certification of educational organizations management systems which publication was expected for December 2022.

A further momentous breakthrough was that the VET21001 Consortium was recognized as a Category C Liaison with the following ISO Technical Committee's Work Groups:

- a. ISO/TC 232/WG 7 "Educational Organizations - Management Systems, to revise ISO 21001:2018"
- b. ISO/TC 232/WG 8 "Educational Organizations - Auditing Practice Group"
- c. ISO CASCO/TC 232/JWG 58 "ISO 21030 Requirements for bodies providing audit and certification of educational organizations management systems"

This recognition is considered a landmark development, as it is the first time that an ERASMUS+ Consortium was conferred with the status of Liaison to ISO: the largest (160+ country members, not counting organizational liaisons) and most credible (nearly 25,000 international standards published) international standardization organization in the world.

Being Liaison to WG 7 and 8 is particularly impactful, given their potential to further exploit parts of the Toolkit through the ongoing revision of ISO 21001 and the planned development of guidelines to audit educational organizations.

Moreover, the consortium promoted all project outputs at national events, such as the Multiplier Events referred to in the application and, also, sought opportunities to promote them in other national and international events, such as meetings, workshops, conferences, among others.

The Multiplier Event disseminating IO5 - the VET21001 Toolkit - aimed to provide a living example of its use by presenting the VET21001 Toolkit and testimonials on its use.

# Conclusion

## 6.1 Project Rationale

The project Intellectual Outputs were specifically designed to contribute to resolving the causes of the low EQAVET adoption in the last decade. Moreover, the project as a whole was engineered to transfer, during its lifetime, its outputs to the organizations that have the capacity to exploit them and the authority to do so, in order to assure its long-term sustainability.

For that reason, after this knowledge transfer is effected, the consortium expects market players, such as VET, HVET/PHE providers and accreditation bodies, to adopt and, possibly, improve these best practices and the different actors to naturally assure the needed resources.

## 6.2 Continued Promotion

All project partners are committed to continue promoting the results of the project, for a minimum of three years beyond the end of its lifetime, through their own communication channels, as reinforced during the last partner meeting of the consortium.

## 6.3 Transferability to Associate Partners

The project was engineered to transfer, during its lifetime, the intellectual outputs to the organizations that have the capacity to exploit them and the authority to do so, in order to assure they remain available and will be used by others.

The growing interest of external organizations across the globe to become associated partners of the consortium lead to the need to develop a VET21001 Community and, to that end, one of the associated partners - Insignis - volunteered to manage this community, by re-locating and re-hosting the VET21001 website and assure its future maintenance. The idea being to evolve from a static website to a dynamic community that can feed the VET21001 Toolkit with additional tools, guidelines and use cases, assuring its updatedness and long-term sustainability.



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# ANNEXES

# VET21001 IO5 Workshops & Development Calendar

	Phases	Description of each phase
<b>Color Code</b>	Initial Discussion & Contributions	Consortium Partners meet to discuss their understanding of the EQAVET Criteria and matching ISO 21001 Requirements. Consortium partners that are educational organizations share how they address it in their organizations. KIC provides Counseling based on the experience of leading the development of ISO 21001 and ISO TS 21030. All contribute with ideas and examples for Toolkit Elements related to the theme cluster under discussion.
	Consensual choice/development	Consortium Partners meet to analyze and discuss the contributions received and consensually decide which will be the chosen one(s) to integrate the VET21001 Toolkit.
	Internal Piloting (2 weeks)	Consortium partners that are educational organizations will test the chosen elements in their organizations. This can be done by either real-life testing where the IO timeframe permits, or via a risk-assessment approach where the timeframe does not permit real-life testing. Feedback on the results of testing will be provided via a pre-defined standardized survey.
	External Consultation (1 week)	Associate partners will be invited to review and test the VET21001 Toolkit elements. Feedback on the results of testing will be provided via a pre-defined standardized survey.
	Improvement (2x1 week)	Consortium Partners will analyze the feedback received and consensually decide which improvements need to be done in the VET21001 Toolkit elements. MCAST will implement the resolutions.
	Publishing (2 weeks)	MCAST and KIC will put the final content of the VET21001 Toolkit into design format and publish it both as an ISBN document. The VET21001 Toolkit will also be published at the VET21001 website.

Workshop Scope				Calendar																
PDCA Phase	Cluster Theme	EQAVET	ISO 21001	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20	Week 21	Week 22	Week 23	Week 24	Week 25	Week 26	Week 27	Week 28	Week 29	Week 30
Plan	Organizational Context, Leadership and Strategy (Mission, Vision, Policy/ies, Goals/Objectives)	1, 1.1, 1.2	4.1, 4.2, 4.3, 5.1, 5.2, 6.2, 8.2.1, 8.3.4																	
	Quality and Risk Management and early warning systems	1.8, 2, 3.4	4.4, 5.1.2, 6.1.1, 6.3, 8.1.1, 8.7																	
	Control of documents and data protection	1.9	7.5, 8.5.5																	
	Human Resources (Responsibilities and authorities, Organizational Knowledge, Competence Development and Capacity Building)	1.4, 1.5, 2.2, 2.3, 2.4	5.3, 6.2.1, 7.1.1.2, 7.1.6, 7.2, 7.3																	
	Involvement of Stakeholders	1.3, 1.7, 3.3	4.2, 5.1.1 m), 7.4.2, 8.2.1 b), 8.3.2 m), 9.1.2, 9.1.3																	
	Partnerships/External Providers	1.6, 2.2	7.1.1.2, 7.1.6, 7.4.2, 8.4																	
	Infrastructure (facilities, monitoring and measuring resources) and work environment	2.1	7.1.1, 7.1.2, 7.1.3, 7.1.4, 7.1.5																	
	Do	Operations (Teaching and Learning)	2.5, 2.6, 2.7, 2.8	7.1.5, 8.3, 8.5, 8.6																
Check	Evaluation	3, 3.1, 3.2	7.2.1 c), 9.1.1, 9.1.2.1, 9.1.3, 9.1.4.2 c), 9.1.5, 9.2, 9.3.2																	
Act	Review & Improvement	4, 4.1, 4.2, 4.3, 4.4	7.4.2, 8.5.2 b), 9.1.2.1, 9.1.3, 9.3, 10.1, 10.2																	

## VET21001 Feedback compilations table on Toolkit template testing

ID	Name of Testing Institution	Title of Document/ Tool	Did you experience any difficulties when testing the tool?	If yes, kindly list the difficulties you encountered.	Did you feel the need to apply any changes to the tool?	Kindly list the changes you applied to the tool (be as specific as possible) and explain why.	What is the added value provided by this tool for your institution and/or other institutions in your similar operational/local context?	Kindly rate the tool's relevance towards the implementation of the EQAVET criteria and corresponding ISO 21001 requirements (1 not relevant - 10 very relevant)
1	ERIFO	Template for PESTEL-SWOT Combined Analyses	No		Yes	To improve the clearness and readability of the tool, the sub-aspects have been divided into separate rows to be individually cross-checked with the dimensions of the SWOT columns. Multiple rows can prompt one to think separately about each sub-aspect and determine what the strengths, weaknesses, etc. are for each of them. Within each cell, a code was used to identify each element within it (the first letter is the corresponding column SWOT, the second is the letter assigned to the row sub-aspect, then ascending number). It might be useful to carry this code back to other related documents. In the final template version, each item should be accompanied by short instructions and a glossary of the terms/sub-aspects used, without taking for granted the knowledge or understanding of the final users - even if there are plenty of guides on SWOT analysis, this IO5 Toolkit ought to be comprehensive and self-supporting/subsistent, to the extent that it is possible.	Combining SWOT analysis with PESTEL analysis, unpacking the table by sub-aspects (and relate rows) helps more focused thinking, making it easier to overcome the blank sheet syndrome. The breakdown by aspects, if these are carefully chosen (and possibly customized by the end user), can also help to better see at which "point" of the SWOT action needs to be taken and on which sub-areas. E.g., in one sub-area we might be inclined to include or have many items, in others none. So what to do? this can retroact iteratively with other tools in the Toolkit such as the Principles-Policies-Objectives table.	8
2	ERIFO	Template for Planning and Monitoring Training	No		Yes	<p>The changes implemented are mainly functional additions and details to the specific regional accreditation framework in which our organization operates. Participation in continuous training activities by internal staff "placed in accreditation" is a condition for periodic maintenance of accreditation for vocational training, employment services, and services for the identification, validation, and certification of competence (these are 3 separate accreditations).</p> <p>These 3 accreditation schemes provide for some topical professional figures to oversee certain processes/services/area of activities - defined in the relevant accreditation schemes (there are 5 processes and as many process responsables for training; 3 topical figures for labor, 2 of which are then divided into different "functional areas," e.g., specialized labor market operator "for vulnerable groups," "for business creation," etc.; 6 for VPL services). Some of these functions/processes may be covered by the same person.</p> <p>At each "renewal," a specific "individual dossier" must be submitted for each internal staff member (can actually also be an external contract faculty member for a course). The dossier is integrated for all 3 accreditations (this is actually a custom). Within the dossier for each employee "under accreditation" one must indicate in detail the training activities in which he/she participated referenced to each process/functional area for which according to the accredited organizational chart he/she is responsible.</p> <p>There are then hourly training minimums to be covered (for each person and for each area/process he/she is responsible).</p> <p>This system forces a complex and highly bureaucratized process of referencing the training activities in which staff have participated to their respective oversight functions under the accreditations.</p> <p>Implemented changes have the function of making this process linear, straightforward, transparent and quick.</p> <p>Implemented changes:</p> <p>The basic unit of row is the training intervention (not the person, not the curriculum). Column filters are inserted. The first row is the learner.</p> <p>This is followed by whether this employee/learner covers some function in the 3 accreditation schemes respectively (YES/NO). Within each accreditation, the aforementioned processes/areas are specified, exactly as indicated by the regulations. For each of them, it is indicated whether or not the row training intervention is referable to one or more of them. Some of the following columns contain information that is then reported in the individual dossiers (ie, they are borrowed from the descriptive fields of the staff training, in the templates provided by the regulatory authority Regione Lazio).</p> <p>We then move on to the description of the curriculum of the training intervention: the purpose (professional development, fulfill competence gaps, obtain a qualification), the type (class, shadowing, blended), the exact name of the course, the title issued (whether attestation of attendance, professional certificate, etc.), the main topic.</p> <p>Next, the timeframe of the training: duration in hours (this is then used to verify that the minimum hours are met for all figures in accreditation), the period (only month-it is needed because training for accreditation for some figures has value only if in the last 2 years), start and end date.</p> <p>Then follows the description of the training provider: it can be internal or external, the name of the organization is given, and the names of the teachers, then also the cost (can be used to control expenses in training).</p> <p>Last columns deal with implementation status (done, in progress, scheduled, postponed, cancelled); finally the method of evaluation, its internal manager (or if there is examination it will be external and at the internal level it is only a matter of checking its passing), the result (effective, not effective, partially effective - effectiveness is parameterized on the purpose of the training specified earlier).</p>	<p>The added value is that training planning and monitoring is a cross-cutting process for all accreditation schemes of the training-work sectors in Italy.</p> <p>The referencing of training to the figures in accreditation is usually an activity that is carried out, especially by small organizations, only at the end when applying for renewal of accreditation. It is done in a very opportunity-driven manner. Nevertheless, it turns out to be time-consuming and wasteful activity.</p> <p>Such a template makes it possible to control the training done for employees under accreditation by easily accomplishing its referencing to their areas of accreditation.</p> <p>To be further improved, one could cross-reference the excel with the organizational chart and then use some macro to automatically compile individual dossiers with relevant information from the table.</p> <p>It becomes crucial to report the role of people in training also to see who is being intervened on the most. E.g., it could also be used with the categories: administration, managers, teachers, etc.</p>	9

3	ERIFO	Template for Principles- Policy- Objectives	Yes	The table ought to be accompanied by instructions and definitions so that the completion results more straightforward - unless the staff is aware of the aim of the table and meaning of words.	Yes	<p>1. The table was modified by changing the title from "Table of Articulation between Principles, Policies and Objectives" to "Definition and Implementation of Principles, Policy and Objectives (PPO)".</p> <p>2. There were created 4 separate sections instead of 2: a) PPO definition; b) Planning PPO to implement; c) Monitoring&amp;measuring the implementation of PPO; d) PPO evaluation. The first section intends to inform about PPO, the PPO category (HR, Strategic, Operational etc.) the current status of PPO (present/not present) and the responsible of the PPO. The Second section aims at planning the implementation needs to meet the PPO statement. It includes also the definition of actions needed, new HRs involved in the process, the type of process (i.e decision making process or supporting) and the main responsible for the implementation. The third section is "Monitoring &amp; Measuring actions to be implemented" and gives info about indicators, means of verifications, levels of priority in the implementation of further actions (calculated thanks to a matrix which prioritizes tasks/actions based on the urgency and importance of the tasks themselves), expected time for the implementation, last date of measurement, current value of the indicator, expected deadlines for the implementation. The last part is dedicated to the evalutaion of the overall PPO and it is unchanged from the original table.</p> <p>3. Creation of a priotization matrix to define a deadline for the implementation of new actions that are not realized yet but are essential to put into action PPO statements. The level of priority are:  MORE URGENT AND IMPORTANT (1-3 MONTHS OF IMPLEMENTATION)  MORE URGENT BUT NOT IMPORTANT (4-8 MONTHS)  MORE IMPORTANT BUT NOT URGENT (9 MONTHS- 2 YEARS)  NOT IMPORTANT NOR URGENT (1-3 years)</p>	It allows to define and map which are the PPO present or missing and what are the implementation needs that should be taken into consideration, realized and monitored in order to transform a PPO into a concrete action.	9
4	ERIFO	Template for Processes	Yes	The main problem comes from process identification. It would perhaps be necessary to propose a Work Breakdown Structure template and related methodology for mapping organizational processes. Or add more columns of more articulation of processes into sub-processes and then phases. In the table in question, it is not clear at which level of the WBS one should be placed (general/particular). The risk is to report processes at different WBS levels. For our organization, this is further complicated by the fact that some processes are standardized at the level of accreditation schemes, which also indicate the respective figures of those responsible. However, the internal practices of training institutions are divergent from what is dictated in the accreditation scheme and by their rigid articulation and subdivision.	Yes	<p>As mentioned in the difficulties encountered, an additional level of detail was included in the process identification, using the phase category. This solution is still not satisfactory. Operating in multiple accreditation systems, a category of greater abstraction ("macro-area" could be used, thus making the process an intermediate level of identification.</p> <p>The item (column) "Type of output" was added in order to give minimal categorization and standardization to the outputs, regardless of the detail then specified in "Output," thus giving a form of recursiveness across processes. Each process/phase (row) was associated with an additional specification with additional columns:  - Rules to be followed: the timelines for carrying out/implementing and finalizing that output by law or common practice (e.g., document delivery, submission of a course startup to the relevant authority, accreditation maintenance, etc.) + Indication of further detail on the presence of mandatory elements (e.g., minimum hours to be guaranteed for a service, specifications on how to file, etc.).</p> <p>In the Responsibilities section: the diction of "Human Resources"-that is, those in charge of that phase-is added. This section may be redundant if the "Job Description" table is also used. The idea here, however, is to have the two together: mapping of internal processes and activity areas + skills (technical and soft) required to oversee those. Here you also specify whether some professional requirement (e.g., qualifying qualification, membership in a register, etc.) is required to perform those activities.</p> <p>The last section references the process/phase/area of activity to the Italian National Directory - Atlas of Labor (which is in turn articulated by Sectors, Processes and Activities) and to the qualifications of the Lazio Regional Directory (regional system of VET professional qualifications) - in this way, in the case of designing a training course to improve efficiency of a certain process, we already have this element - as well as it is possible to insert new human resources knowing the skills required to preside over those processes. Finally, the exercise of those activities develops nonformal learning: it becomes possible to activate competence certification processes for those who are in charge of those processes, already knowing what they can be certified in.</p>	Most of our organization's activities must comply with multiple and layered requirements and regulations. Having the mandatory references for current processes is critical. The referencing of activities/processes to the possible qualifications in the repertoires facilitates training design for use with the Interprofessional Funds, which are the main channel of funding for continuing employee training in Italy. Much of the activity carried out in accreditation is supported/enabled by constant communicative interchange with reference administrations and service users (acquiring documents, transmitting them, sending them, getting them signed and turned over, sending authorization requests, sending requests for maintaining accreditation, multiple and unsynchronized deadlines, etc.), mapping them is crucial. This tool can also have a strong teaching and learning value for new hires, given the high staff turnover in small and medium-sized regional VET training providers.	9
5	ERIFO	Document Master List	Yes	I am unclear about the use of the two excel sheets-although the second one should, from what I understand, have the function of tracking the change in document ID codes - they end up reporting almost the same information. The descriptive categories of the documents seem to me to be complex on the one hand, and there is little information on the other. The topical documents in our organization are few. Mixing in this same document also templates, training projects, administrative documents, facsimiles, etc., which instead abound in our business, risks confusion and the categories used are not applicable to all those. Many of the core documents we have are external but with internal effects for our activity. Others numerous are the formats of records of training and employment services activities, which are provided to us by the relevant regulatory authority. The template handles only internal documents. Assigning identification codes to those doesn't seem appropriate, but having this whole set of documentation (internal only; internally produced but intended for external users; externally produced and intended for service users; externally produced and intended for	Yes	<p>See difficulties encountered.</p> <p>I have not completed the modified file, and what has been changed still does not satisfy me. It is indeed difficult, but for my business necessary, to compile such disparate documents into a single master document list. I would insert an "internal/external" column, the "level" of the document (e.g., national, regional, European - with respect to origin, in the sense of issuing authority - or application, if e.g., produced internally); then "Area" (e.g., internships, certification system, vocational training, youth guarantee, etc. ), then "Theme," as a further level of detail (here with more descriptive indications of content), then the year and date, the "Category/Type of document" (national law, decree, guidelines, research report, deliberation, regulation, etc.), the identification code, the "Status" (in force, repealed, updated by..., etc.).</p>	Keeping track of documents is essential, however with regard to our business (small organization working in complex, layered and multiple systems although sometimes with a high level of integration) it is necessary to have a document that is more integrated and at the same time more focused on external, rather than internal, documentation. The internal one is more made up of templates, projects, service proposals, quotations, handouts, training materials, which are poorly framed, as flexible and cross-cutting, in the form of the initial table.	6

				administrations; externally produced and having an authorizing function for our activities, etc.) in one file does seem appropriate. The format could probably be if improved useful to large organizations, but in the case of small ones (4-10 permanent employees + external collaborators for lectures and various assignments) it is inconvenient to use as the topical figures are reduced and the division into departments gives way to flexible organizational structures tending toward a project-based model.				
6	ERIFO	Job Description	No		Yes	The table was slightly modified by only increasing the number of information provided. It was added a column to the section "pre-requirements" called "minimum number of positions required" where to insert the number of resources needed in a specific position both if considered mandatory or not. It was added a section called reference document that shows 1. the "external reference" which can be a binding law as per in the case of the Region of Lazio where the training provider needs to be legally accredited. A document external to specific entities. 2. "ID" the identification number of the external document which can be useful to search the document itself 3. "Regional qualification associated/related to the process" indicates if there is a compatible qualification in the Regional System that allows to align job descriptions in terms of competences with the Italian and more specifically, Regional, system of certification of competencies. Those last column could be adapted to the system of reference in each European Country.	It helps to rethink to job position present and needed internally to the Organization and give the opportunity to link the professional profile to the set of knowledge, skills and attitude necessary to work in a specific role. It can also support the organization to detect eventually strengths and weaknesses for each job profile.	10
7	AEVA	Template for Planning and Monitoring Training_Rev2	No		Yes	Add a few columns to the template: - Modality of the training (face-to-face, online, both); - Schedule date (to convert into a dynamic table that can give the training calendar) - certificate (yes or no question) - evidence of the training (a link to the evidence that the training was completed) - evaluation of the trainer/ training organization (yes, no, NA answer) Add dropdown lists in order to make the table more easy to fill.	this tool will make it easier to register and control the trainings and the information related to those trainings.	8
8	AEVA	Template for PESTEL-SWOT Combined Analyses	No		Yes	AEVA suggests that a few examples or a short description should be added to each line to make it easier to understand what is intended to analyse	The person responsible for the EQAVET management system never did risk analysis or swot analysis, so this tool was important to do so	8
9	AEVA	Template for Document Control	Yes	The field "Transfer needs" is not clear - maybe add a small description	Yes	For the internal documents AEVA thinks is necessary to add who are the persons that can edit the internal documents (propose and make changes) For the records AEVA suggests the inclusion of "who can modify a record" and "how to track the modifications"	The document is very practical, easy to apply and clear	10
10	AEPTL IPTrans	Template for Interested Parties	Yes	Columns D, E and F - we are not sure of understanding the correct use of those columns	No		It is a way of having an overview of the interested parties for each process, permitting us to better identify our weaknesses or strengths.	7
11	AEPTL IPTrans	Template for Organizational Context	Yes	Since it was a table to reflect and identify organizational context, we choose, as a process, "To maintain, permanently updated, the equipment's list". In consequence, we didn't find very applicable the columns, although we filled them.	No		I admit that what we chose as a process was not adequate. What another choice, I admit it's utility.	7
12	AEPTL IPTrans	Risk Matrix	Yes	Column C - Type: we should be able to insert weaknesses and strengths Column F - Probably of occurring: It would be useful to have a "medium" Column G - Impact on the objectives and goals: It would be useful to have a "medium" Column H - Classification: we feel this is a redundant action and therefore not useful Column O - Efficiency evaluation: we don't understand the utility	No		It helps us to have an overview of these aspects, facilitating the swot analysis	8
13	AEPTL IPTrans	Template for indicators	No		No		It helps us to organize all the indicators, facilitating the overview and the control of the deadline to obtain them on time.	8
14	AEPTL IPTrans	Documents list	Yes	I had some doubts about what is a Management Manual and about what is the difference between process and procedure.	No		It helps us to control all the documents and their versions. However, we might experience some difficulties since we have several persons who will need to register the documents. The solution might be to have more than one form.	7
15	AEPTL IPTrans	Document Master List	Yes	Sheet "Source", column E (document type), we found it hard to classify the teachers' welcome manual. Sheet "DCN register" - the second sheet seems to repeat partially the first one.	No		It helps to organize the documents and their versions, although we might need to use more than one, according to the responsible.	8
16	AEPTL IPTrans	Matriz PEO	Yes	I felt that this scheme is not universal. Therefore, it needs adaptation to each school context.	No		It gives us a visual overview, from a dynamic perspective, of the process with which we are dealing.	7
17	AEPTL IPTrans	Template for Job Description	No		No		It helps us to concentrate all the information about the responsibilities of each collaborator, making it easier to decide which is more adequate, whenever a new responsibility must be assigned. Also, it helps us to better organize the distribution of work and responsibilities.	9

18	MCAST	Template for Interested Parties	Yes	The requirements of the final column titled: How it affects, is affected or perceives itself as being affected Relevant requirements (needs and expectations), was not very clear when I first started using the tool. At first I was including the responsibilities of the identified parties in this column, however following guidance by the institution who uploaded the document, I could understand that in this column I needed to think beyond the responsibilities of such parties and include information on how the parties affected or were affected by the institution as a result of their responsibilities. In the case of users who did not have direct responsibilities towards the institution (such as in the case of clients) rather than looking at the responsibilities I needed to look at how these parties were affected or perceived themselves as being affected by the institution through the service being given to them.	No		The tool helps its users' thought process, guiding them in identifying the interested parties who either directly or indirectly, affect, are affected by, the institution.  The major strength of this tool is that it helps the user to identify stakeholders which may not be so obvious and which therefore, in a scenario in which the institution does not conduct such a self reflective exercise as required by this document, such interested parties might be overlooked, and therefore either not catered for, or not considered as potential risks for the success of the institution.	9
19	MCAST	Template for Processes	No		No		The tool helps the user to carry out a selective exercise on the various processes making up their Institution's Quality Management System.  The way the document is structured, guides its user to break processes into smaller components which can then be reviewed and assessed /verified individually. Identifying the inputs and outputs of a particular process, and the related responsibilities, sources and destinations of such inputs and outputs, is a requirement of any quality management system which is not always easy to accomplish. This tool facilitates such an exercise.  Through the use of this tool, institutions would be creating a map of all their processes which in turn will facilitate the monitoring of such processes and help with any decisions which would need to be taken in their regard.	8
20	MCAST	Template for Document Control	No		Yes	Added some clarifications in some column headings and an extra column for document identification.	Document control is a crucial element of any QMS. Knowing your documents and keeping as much information about their function and purpose within the institution's QMS is very important. This tool provides users with a set of information which they need to identify and control for their documents. The tool is built on the requirements of the ISO 21001 standard, and therefore the users would have piece of mind that the information they are controlling is in line with the requirements of the standard.	10
21	MCAST	Strategic Plan	Yes	The document does not include any instructions to help the users fill in the different sections and hence it was difficult to fill in the different sections (some more than others).  Moreover, the document is intended to be compiled by Top Management while setting the strategy for the institution. It is definitely not a tool which can be filled in by everyone, and not a tool which can be tested in a short period of time.	Yes	Fixed the numbering and updated the layout and structure of the template.  Should this document be included in the tool kit, it would be recommended that instructions on what is expected from the users in the various sections are included.	This tool seems to include combination of other tools merged into one. Some of these tools may have been already submitted for consideration of inclusion in the toolkit by other institutions.	6
22	MCAST	ACTION PLAN	Yes	It was unclear how to classify entries especially with regards to the DOING section.  It was unclear whether one needs to include an entry in each section for the same task in order to show progress.	Yes	Converted to MS Excel to be able to manipulate tables better.	The tool adds value in helping users keeping track of what needs to be done, however the classification by PDCA headings felt like an Unnecessary Complication.	6
23	MCAST	Privacy policy for users	Yes	Since the document is intended as a learner agreement, and is based on requirements set up by a specific region, it was not possible to test the document.  Some of the fields were not clear (possibly because of the difference in context).	Yes	The document needs to have a title and a brief descriptive paragraph to explain its nature and purpose.  There are no fields for Student Personal data which are indispensable in this type of document.  An update to the declaration, removing the need of the student to select whether they give or not consent is also being suggested. Students who do not give consent could simply not sign the document.	Student Learning Agreements are an important part of Quality Education. However for the purposes of the project and the scope of the VET Toolkit which aims at providing off-the-shelf tools, the dissemination of this document as a tool is limited by its context.	5
24	MCAST	Template for Processes V2	No		No		The tool is a modification/ enhancement on the Template for Processes Submitted by KIC. The additional columns add more detail to the tool. There may be situations in which the information requested is not applicable to the particular	9

							process, howwe the tool will help the user think of as may possible scenarions/requirements as possible.	
25	MCAST	Template to Control External Providers	No		No		The tool helps users to keep a record of approved or non approved suppliers. The various column headings help the user in the thought process required to set up the criteria for approval and dismissal, and the structure of the document ensures that the same standard is maintained for all other suppliers.	9
26	MCAST	Template for Management Review	No		Yes	Minor changes to the nomenclatures of the Internal stakeholder categories	The tools helps with the recording of minutes and decision, and for the followup on such decisions, for use during Management review. The tool facilitates the Management Review giving the users the piece of mind that all topics are being addressed and that all those responsible for specific actions are identified, thus facilitating follow up.	10
27	IPTrans	Cluster 2 Template for Indicators	No		No		For my institution, I feel it is a bureaucratic tool. However, to bigger institutions, namely with delegations, it might be more useful, specially in what concerns the identification of evidences and its location.	5
28	ERIFO	Template for organizational context	No		No		The template helps to reflect on the internal and external context relative to each process, although the categories with which to classify entries might be on the one hand reduced and on the other hand not inclusive of some aspects.	7
29	ERIFO	Template to Plan Internal and External Communication	Yes	It is not clear to me on what time basis the communication should be scheduled and what kind of communication we are referring to.	No		The tool is very straightforward. There are annual deadlines and milestones where communication flows are expected. Sharing in organization and structure helps to prepare in time the mode and communicative style of the message, the media to disseminate it, and has spillover effects on external image. It can help give continuity to efforts, which sometimes lapse after initial beginnings due to inertia	8
30	aeva	CMS Supplier evaluation chart	No		Yes	In order to comply with ISO21001 requirements (8.4) some new fields were added, as well as fields AEVA considers relevant for bigger institutions (with more that one site). Also a criteria field should be included in order to determine the actions that should be done id a product/service is not complying with the request, the impact of that non compliance and the corrective actions necessary	it structures the evaluation	8
31	IPTrans	Template for Indicators	Yes	In the first column, Process, it is not clear if we should identify the designation of the process.	No		It can provide us with a synthetic information, where I can make comparisons between diferent diferent classes, courses, years or training cycles.	7
32	aeva	CMS SUPPLIER EVALUATION CHART	No		Yes	add columns such as: request made by; date of the request; process; delievery place; order proved by, etc. some nots were also added	it is a good example of suppliers evaluation	9
33	AEVA	Template for Audit Plan	Yes	If ypu don't know how to audit a organisation you may find difficult to fill the items	Yes	Insert the place of audit (an organisation may have more then one place)	The audit plan used by AEVA was not according to the criteria of ISO 19011:2018 Guidelines for auditing management systems.	9
34	MCAST	Annual Activity Plan	Yes	Some elements such as the scope of the document and the requirements of certain parts were not clear. However after clarification from the owner institution such difficulties were clarified. In a similar situation users without access to IPTRANS as the author of this document, should be in a position to use the document from the use case and the descriptive text on the website and e-book	Yes	Minor rewording of guidance notes and layout of the document	The document helps institutions to keep track of the implementation of their institution strategic plans by focusing on the activities being undertaken by the various departments within their institution for a particular year. The complexity of use of this document will depend on the size and context of different institutions.	6
35	Professional School of Image	Document Master List	Yes	Regarding the "Document Change Number (DCN)" column, since you place the changes made to the documents, at the bottom of the board we do not understand the numbering made at the top, it is not very clear why. It is also not very clear, the concept of the notes relating to this column.	Yes	In the column "Document Revision (REV)", instead of letters we put the date on which the revision begins, this mode is more in line with our working method	This form of registration has made us rethink how to record the version change on the cover of documents and how to list our documents.	7
36	ETAP - Escola Profissional	Risk Matrix	No		Yes	Adapt to de 5W - 2H TOOL	IT IS A TOOL THAT ALLOWS AT THE LEVEL OF VISUAL MANAGEMENT AN IDENTIFICATION OF IMPROVEMENT OF DEVIATIONS IN THE ORGANIZATIONS' ACTIVITIES.	7
37	FORPRO   ESCOLA PROFISSIONAL VAL DO RIO	Template for principle policies objectives	No		No		We already apply a tool similar to this one.	8



### **About the VET21001 Project and this publication**

The VET21001 project aims to develop a capacity building program, an accredited certification scheme and an implementation toolkit to motivate a wider EQAVET adoption. The VET21001 toolkit will use a standardized approach based on the recently published ISO 21001:2018, capitalizing on its already internationally consensually approved content and expecting that, by associating the ISO brand to EQAVET, all players in the market, including those of the standardization, accreditation and certification worlds, will become more curious about it, as well as willing to contribute to its dissemination and assuring its sustainability.

This document describes the development of VET21001 Intellectual Output 5, *EQAVET+Toolkit*, renamed the **VET21001 Toolkit**.



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