



VET21001 TOOLKIT E-BOOK

Version 3



VET21001

Authors

VET21001 Consortium and Associate Partners

Layout

Tara Drev²

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The VET21001 Consortium

Ente di Ricerca e Formazione	ERIFO	IT
Knowledge Innovation Centre	KIC	MT
Associação para o Ensino Profissional em Transportes e Logística	AEPTL	PT
Skupnost višjih strokovnih šol Republike Slovenije	Skupnost VSŠ	SI
Associação para a Educação e Valorização da Regio de Aveiro	AEVA	PT
Malta College of Arts Science and Technology	MCAST	MT

VET21001 Community: <https://vet21001.eu/partners/>

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I. Introduction to the toolkit

The VET21001 Toolkit is the output of an applied research project with the same name, co-funded by the Erasmus+ programme of the European Commission.

Its initial goal was to facilitate EQAVET:2019 adoption by providing VET schools with ready-to-use tools inspired by ISO 21001:2018. However, considering the interest and feedback received from other educational sub-sectors during the project lifetime, it became obvious that the Toolkit can also support the implementation – stand-alone or integrated - of other standards, both proprietary and formal, such as ENQA-ESG, ISO 9001, among others. For this reason and to make the Toolkit more inclusive, the term VET-provider was substituted by the broader term educational organization across the toolkit. The tools included in the VET21001 Toolkit are a possible approach to the requirements of the before mentioned standards but are not the only path to conformity towards them. Different approaches are possible and can be developed and implemented in educational organizations.

Presented as an open-source e-book supported by a website, the VET21001 Toolkit includes:

- a glossary with terms and definitions necessary for the correct interpretation of the Toolkit's content;
- the management tools description and guidelines on its application, including:
 - Editable Tool templates, ready to be used as is or after context adaptations;
 - Use cases, in the form of filled Tool's templates by different organizations to illustrate its application.

The tools and guidelines at the VET21001 Toolkit are organized in ten thematic clusters. These are:

1. Leadership & Strategy
2. Quality & Risk Management
3. Data Protection & Control
4. Knowledge and Human Resources
5. Involvement of Stakeholders
6. Partnerships & Providers
7. Infrastructure & work environment
8. Design & Delivery of Services
9. Analyses & Evaluation
10. Review & Improvement

Each cluster provides a short introduction to the theme and lists, in the form of a matrix, the EQAVET:2019 criteria and their indicative descriptors at VET provider level, as well as the ISO 21001:2018 requirements that are related to the theme.

In the case of EQAVET:2019, the full text of the criteria and indicative descriptors are provided and to enable the development of the relationship-matrices, the EQAVET:2019 criteria and its indicative descriptors were numbered. The rationale used for the numbering was top-down,

both for the criteria (first digit) and its indicative descriptors (second digit), following the order in which they appear in the European Recommendation.

In the case of ISO 21001:2018, the number and title of the clauses are provided, but not their full content, due to ISO copyrights. For this reason, it is recommended that users are in possession of ISO 21001:2018 when using this Toolkit. ISO 21001:2018 can be bought from the [ISO store](#), as well as from any national standardization body, which [list](#) can be consulted at the ISO website.

In clusters in which multiple alternative tools are being proposed to address the same requirements, users should select the preferred tool depending on the context of the organization.

The VET21001 Tools and Use Cases can be downloaded from the [VET21001 website \(www.vet21001.eu\)](#) which supports this e-book. For comfort of the users, they are individually digitally linked to this e-book in the sections where explanations on how to use them are provided.

II. Glossary

Assessment of learning outcomes	<p>[1] "Process of appraising knowledge, know-how, skills and/or competences of an individual against predefined criteria (learning expectations, measurement of learning outcomes). Assessment is typically followed by certification.</p> <p><i>Comment: in the literature, 'assessment' generally refers to appraisal of individuals whereas 'evaluation' is more frequently used to describe appraisal of education and training methods or providers."</i></p>	<p>[1] CEDEFOP, 2014</p>
Audit criteria	<p>[1] "Set of policies, procedures or requirements used as a reference against which objective evidence is compared.</p> <p><i>Note 1 to entry: Audit criteria are used as a reference against which audit evidence is compared."</i></p>	<p>[1] ISO 9000:2015</p>
Audit evidence	<p>[1] "Records, statements of fact or other information which are relevant to the audit criteria and verifiable.</p> <p><i>Note 1 to entry: Audit evidence can be qualitative or quantitative."</i></p>	<p>[1] ISO 9000:2015</p>
Complaint procedure	<p>[1] "Standard procedure for expressing learners' (quality) dissatisfaction with a VET action or management.</p> <p><i>Comment: complaint procedures lead to a corrective action or measure if required."</i></p>	<p>[1] CEDEFOP, 2011</p>
Continual improvement	<p>[1] "Recurring activity to enhance performance.</p> <p><i>Note 1 to entry: The process of establishing objectives and finding opportunities for improvement is a continual process through the use of audit findings and audit conclusions, analysis of data, management reviews or other means and generally leads to corrective action or preventive action."</i></p>	<p>ISO 9000:2015</p>
Curriculum	<p>[1] "Documented information of what, why, how and how well learners should learn in a systematic and intentional way.</p> <p><i>Note 1 to entry: A curriculum can include, but is not limited to, the learning aims or objectives, content, learning outcomes, teaching and learning methods, performance indicators, assessment methods or research plan that are related to learning. It can also be referred to as a competence profile, competence referential, study programme or teaching plan."</i></p>	

	<p>[2] "Inventory of activities related to the design, organization and planning of an education or training action, including definition of learning objectives, content, methods (including assessment) and material, as well as arrangements for training teachers and trainers.</p> <p><i>Comment: the term curriculum refers to the design, organization and planning of learning activities while the term programme refers to the implementation of these activities."</i></p>	<p>[1] ISO 21001:2018</p> <p>[2] CEDEFOP, 2014</p>
Document	<p>[1] "Information and the medium on which it is contained. EXAMPLE Record, specification, procedure document, drawing, report, standard.</p> <p><i>Note 1 to entry: The medium can be paper, magnetic, electronic or optical computer disc, photograph or master sample, or combination thereof.</i></p> <p><i>Note 2 to entry: A set of documents, for example specifications and records, is frequently called "documentation".</i></p> <p><i>Note 3 to entry: Some requirements (e.g., the requirement to be readable) relate to all types of documents. However, there can be different requirements for specifications (e.g., the requirement to be revision controlled) and for records (e.g., the requirement to be retrievable)."</i></p>	<p>[1] ISO 9001:2015</p>
Documented information	<p>[1] "Information required to be controlled and maintained by an organization and the medium on which it is contained.</p> <p><i>Note 1 to entry: Documented information can be in any format and media, and from any source.</i></p> <p><i>Note 2 to entry: Documented information can refer to:</i></p> <ul style="list-style-type: none"> - the management system, including related processes; - information created in order for the organization to operate (documentation); - evidence of results achieved (records)." 	<p>[1] ISO 21001:2018</p>
Educational Organization	<p>[1] "Organization whose core business is the provision of educational products and educational services.</p> <p><i>Note 1 to entry: This can include an educational organization within a larger organization whose core business is not education, such as a professional training department."</i></p>	<p>[1] ISO 21001:2018</p>

European quality assurance in vocational education and training (EQAVET)	<p>[1] “Reference framework to help EU member States and participating countries develop, improve, guide and assess the education and training quality of their own vocational education and training systems.</p> <p>Comment: the methodology proposed by the framework is based on:- a cycle consisting of four phases (planning, implementation, assessment and review) described for VET providers/systems;</p> <ul style="list-style-type: none"> - quality criteria and indicative descriptors for each phase of the cycle; - common indicators for assessing targets, methods, procedures and training results – some indicators are based on statistical data, others are of a qualitative nature.” 	<p>[1] CEDEFOP, 2014</p>
Evaluation of education and training	<p>[1] “Evaluation of education Judgment on the value of an intervention, and training programme or policy with reference to criteria and explicit standards (such as its relevance or efficiency).</p> <p>Comment: evaluation encompasses two broad aspects:</p> <ul style="list-style-type: none"> - evaluation as a systematic investigation to determine the worth or merit of a programme, measure or policy by means of careful appraisal and study, based on relevant social research methods and criteria, standards and indicators (summative evaluation or impact evaluation); - evaluation as a developmental process that illuminates or enlightens specific policies, processes and practice for its stakeholders, contributes to collective learning, reduces uncertainty in decision-making and helps to improve the design and implementation of the programme and/or of future related initiatives (formative or process evaluation).” 	<p>[1] CEDEFOP, 2011</p>
Interested Party/Stakeholder	<p>[1] “Person or organization that can affect, be affected by, or perceive itself to be affected by a decision or activity.”</p>	<p>[1] ISO 21001:2018</p>
Objective	<p>[1] “Result to be achieved.</p> <p>Note 1 to entry: An objective can be strategic, tactical, or operational.</p> <p>Note 2 to entry: Objectives can relate to different disciplines (such as educational, financial, health and safety, and environmental goals) and can apply at different levels (such as strategic, organization-wide, project, product and process).</p> <p>Note 3 to entry: An objective can be expressed in other ways, e.g., as an intended outcome, a purpose, an operational criterion, as an EOMS objective, or by the use of other words with similar meaning (e.g., aim, goal, or target).”</p> <p>Note 4 to entry: In the context of EOMS, EOMS objectives are set by the organization, consistent with the EOMS policy, to achieve specific results. ”</p>	<p>[1] ISO 21001:2018</p>
Policy	<p>[1] “Intentions and direction of an organization, as formally expressed by its top management.”</p>	<p>[1] ISO 21001:2018</p>
Process	<p>[1] “Set of interrelated or interacting activities which transforms inputs into outputs.”</p>	<p>[1] ISO 21001:2018</p>

Programme	<p>[1] "Consistent set of courses designed to meet defined learning objectives or learning outcomes and leading to recognition.</p> <p>Note 1 to entry: Recognition can take the form of a degree, a certificate of completion, participation or achievement, a badge, diploma, and other forms."</p> <p>[2] "Inventory of activities, content and/or methods implemented to achieve education or training objectives (acquiring knowledge, skills and/or competences), organised in a logical sequence over a specified period of time.</p> <p>Comment: the term programme of education or training refers to the implementation of learning activities whereas curriculum refers to the design, organization and planning of these activities."</p>	<p>[1] ISO 21001:2018</p> <p>[2] CEDEFOP, 2014</p>
Record	<p>[1] "Document stating results achieved or providing evidence of activities performed.</p> <p><i>Note 1 to entry: Records can be used, for example, to formalize traceability and to provide evidence of verification, preventive action and corrective action.</i></p> <p><i>Note 2 to entry: Generally records need not be under revision control."</i></p>	<p>[1] ISO 9001:2015</p>
Requirement	<p>[1] "Need or expectation that is stated, generally implied or obligatory.</p> <p>Note 1 to entry: "Generally implied" means that it is custom or common practice for the organization and interested parties that the need or expectation under consideration is implied.</p> <p>Note 2 to entry: A specified requirement is one that is stated, for example in documented information."</p>	<p>[1] ISO 21001:2018</p>
Risk	<p>[1] "Effect of uncertainty.</p> <p>Note 1 to entry: An effect is a deviation from the expected — positive or negative.</p> <p>Note 2 to entry: Uncertainty is the state, even partial, of deficiency of information related to, understanding or knowledge of, an event, its consequence, or likelihood.</p> <p>Note 3 to entry: Risk is often characterized by reference to potential "events" (as defined in ISO Guide 73:2009, 3.5.1.3) and "consequences" (as defined in ISO Guide 73:2009, 3.6.1.3), or a combination of these.</p> <p>Note 4 to entry: Risk is often expressed in terms of a combination of the consequences of an event (including changes in circumstances) and the associated "likelihood" (as defined in ISO Guide 73:2009, 3.6.1.1) of occurrence."</p>	<p>[1] ISO 21001:2018</p>
Standard	<p>[1] "Series of elements whose content is defined by concerned actors.</p> <p>Comments: one can distinguish between several types of standards:</p>	<p>[1] CEDEFOP, 2014</p>

	<ul style="list-style-type: none"> • competence standard refers to knowledge, skills and/or competences linked to the practice of a job; • educational standard refers to statements of learning objectives, content of curricula, entry requirements as well as resources required to meet learning objectives; • occupational standard refers to the statements of the activities and tasks related to a specific job and to its practice; • assessment standard refers to statements of the learning outcomes to be assessed and the methodology used; • validation standard refers to statements of level of achievement to be reached by the person assessed, and the methodology used; • certification standard refers to statements of the rules applicable for obtaining a certificate or diploma as well as the rights conferred. <p>According to the system, these standards can be defined separately or be part of one document.”</p> <p>[2] “Document, established by consensus and approved by a recognized body, that provides, for common and repeated use, rules, guidelines or characteristics for activities or their results, aimed at the achievement of the optimum degree of order in a given context.</p> <p>Note 1 to entry: Standards should be based on the consolidated results of science, technology and experience, and aimed at the promotion of optimum community benefits.”</p>	[2] ISO/IEC Guide 2:2004
Training course planning and design	<p>[1] “Set of consistent methodological activities employed in designing and planning training initiatives and schemes against objectives set.</p> <p>Comment: training course planning and design includes analysis of training demand and needs, project design, coordination and implementation monitoring as well as assessment of training impact.”</p>	[1] CEDEFOP, 2014
Training needs analysis	<p>[1] “Systematic evaluation of present and future skills needs against the skills available to implement an efficient training strategy.”</p> <p>Comments:</p> <ul style="list-style-type: none"> - training needs analysis rests on: <ul style="list-style-type: none"> (a) identification of skills needs; (b) assessment of skills available in the workforce, and (c) appraisal of skills gaps and shortages; - training needs analysis can be conducted at individual, organizational, sectoral, national or international levels; it may focus on quantitative or qualitative aspects (such as level and type of training) and should ensure that training is delivered effectively and cost-efficiently.” 	[1] CEDEFOP, 2014

1. Cluster Theme 1

1.1 Cluster Description

Understanding the internal and external context of the educational organization is a necessary step for leaders to develop a strategy that will enable the educational organization to fulfil its mission and achieve its vision.

EQAVET:2019 and ISO 21001:2018 clearly require that educational organizations understand their internal culture, strengths and limitations, as well as the relevant factors that impact the markets in which they operate. In possession of this knowledge, the task of identifying relevant stakeholders and their needs and expectations is facilitated. Once those are clear, leaders have what they need to define and implement their strategy.

Both EQAVET:2019 and ISO 21001:2018 require educational organizations to deploy their strategy in the form of principles, which are cascaded into policies that are then translated into measurable objectives over time.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/leadership-and-strategy/>

EQAVET Criteria

1. Planning reflects a strategic vision shared by the relevant stakeholders and includes explicit goals/objectives, actions and indicators.

1.1 European, national and regional VET policy goals/objectives are reflected in the local targets set by the VET providers

1.2 Explicit goals/objectives and targets are set and monitored, and programmes are designed to meet them

ISO 21001 Requirements

4.1 Understanding the organization and its context

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

1.2 VET21001 Tools – Cluster 1

Tool Title

Template for Organizational Context

Template for PESTEL-SWOT Combined Analysis

Template for Principles Policy Objectives

Strategic Plan

Annual Activity Plan

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

1.3 Template for Organizational Context

The template for Organizational Context tabulates the factors indicated as relevant at ISO 21001:2018 for the identification of the internal context (values, culture, knowledge and performance) and external context (legal, technological, competition, commercial, cultural, social and economical). The table is organized in such a way to allow this identification to be done by process, instead of for the organization as a whole. The advantage of doing the identification of the internal and external context by process is that it facilitates the identification of more detailed aspects that might be relevant for a given process, but not for the whole organization, and that might be missed otherwise.

Users should start by identifying their processes on column A and then, having each process in mind, proceed to:

1. use columns B to E to categorize each internal context aspect identified and column F to describe it;
2. use columns G to M to categorize each external context aspect identified and column N to describe it;

Rows should be added to the table as necessary to enable the inclusion of all aspects identified as relevant.

1.4 Template for PESTEL-SWOT Combined Analysis

In the management systems world, since the introduction of the high-level requirement on organizational context, common to all ISO management system standards, it became a trend for organizations to use a SWOT Analysis to identify their internal and external context.

Although this seems to be a straightforward approach, it might not facilitate a deeper analysis, considering all factors - particularly external factors - listed at ISO management systems standards as potentially relevant. To overcome this risk, a PESTEL-SWOT combined analysis can be performed, also onboarding some internal factors mentioned in standards such as ISO 31000 on risk and ISO 22301 on business continuity.

The template to make such combined analysis has the four areas of the SWOT analyses, but also lists the relevant factors to consider, thus helping deepen the reflection.

1.5 Template for Principles Policy Objectives

The template for Principles, Policies and Objectives tabulates the EQAVET:2019 and ISO 21001:2018 requirements of the respective clauses, making it straightforward for educational organizations to deploy a strategy in an objective, systematic and articulated way.

Once the applicable principles are inserted in the template, policies derived from these can be established/adopted, and SMART objectives to deploy them can be determined for any given

period. This includes all necessary details to plan the achievement of objectives, such as actions, resources, responsibilities, deadlines and methods to monitor and measure its achievement.

1.6 Strategic Plan

This tool aims to define the measures or actions to be implemented by the educational organization over a medium to long-term period of time.

The educational organization should start by conducting a self-reflective review a diagnosis starting with an analysis of the general and sectoral external environment, including the reflection on the threats, the opportunities and the critical factors for success.

Such a reflection should be followed by an internal diagnosis, in which the resources (premises, equipment, human resources, etc.) are considered, as well as the strengths and weaknesses.

This tool shall also be used to identify the Mission, the Vision, the Values, and the strategic objectives for the period under review.

Finally, the educational organization should establish a planning matrix which will provide the connection between the strategic objectives and the corresponding measures or actions to implement them. These will require the identification of those responsible, the implementation schedule, the performance indicators as well as any applicable monitoring and measurement.

1.7 Annual Activity Plan

The Educational Organization's Annual Activity Plan considers the recommendations inserted in the Annual Report.

The document is essential for the EQAVET:2019 implementation methodology since it provides us with an updated plan.

The document targets all internal and external interested parties.

This document is related to all the other documents that are referred to the EO' activity, namely the Action Plan. This document relates to ISO 21001:2018 Clause:6.2 as it is an essential document for the planning of changes.

It is related to all the other documents that are referred to it.

This document also relates to ISO 21001:2018 Clause:6.1.1, as it specifically has several items concerning the revision of activities, the institutional dialogue for the continuous improvement of the VET offer and the application of the continuous improvement cycle.

2. Cluster Theme 2

2.1 Cluster Description

Mastering quality – or, in other words, assuring that the educational services can respond to the learners and other stakeholders needs and expectations – means evidence-based decision-making, adapting to changes and enabling continuous improvement.

To motivate this, both EQAVET:2019 and ISO 21001:2018 contain requirements for a systematic approach to quality management and quality assurance, with:

- a plan-do-check-act approach;
- clearly defined processes planned to respond to learners’ and other stakeholders’ needs and expectations, which effectiveness and efficiency are monitored through indicators;
- the implementation of early warning systems, capable of identifying situations – problems, potential problems (risks), opportunities – and of taking action to address them.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/quality-risk-and-early-warning-systems/>

EQAVET Criteria

1.8. VET providers have an explicit and transparent quality assurance system in place
2. Implementation plans are devised in consultation with stakeholders and include explicit principles
3.4 Early warning systems are implemented

ISO 21001 Requirements

4.4 Management system for educational organizations (EOMS)
5.1.2 Focus on learners and other beneficiaries
6.1.1 Actions to address risks and opportunities
6.3 Planning of changes
8.1.1 Operational planning and control - General
8.7 Control of the educational nonconforming outputs

2.2 VET21001 Tools – Cluster 2

Legend: 1a, 1b tools are alternative to each other – use either one or the other

Tool Title
Template for Processes
Action Plan
Template for Risks-Actions
Template for Risk Matrix
Template for Indicators
Template for Integrated Improvement System (SIM)

Note: *It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.*

2.3 Template for Processes

The template for Processes follows the process description approach recommended by ISO 21001:2018. In this approach, a process is defined as a set of interrelated activities that transform inputs into outputs/results by adding value to them. This approach also considers an internal supplier/internal customer philosophy. To reflect this, the template has columns to describe the activities in each process, the inputs necessary to perform those activities (and where they come from) and the outputs expected as results (and to whom are they destined to).

Complementary to the ISO 21001:2018 vision, this VET21001 tool adds a column to the template to identify who is responsible to perform each activity. Although it might be counter intuitive, the first columns to be filled in this template are the central ones with the description of tasks and who is responsible for it. After those columns are filled, which can be done in text or with a flowchart, it is much easier to determine which inputs are needed to perform them and who is the internal or external supplier who will provide them. Likewise, it facilitates the identification of the expected outputs, which can be intermediary or final and to which internal or external customer are they destined and should be handled to.

2.4 Action Plan

This Action Plan (AP) defines the implementation of surveys on students, parents, teacher/trainers and other collaborators. This action plan defines the activities, inputs, responsible and or organs and others involved as well as the execution mode, deadlines, expected results and modes of dissemination. The document is essential for the EQAVET:2019 implementation methodology since it provides the EO (educational organization) with an action plan for receiving the contributions of learners and other beneficiaries.

The document targets all internal interested parties.

This document is related to all the other documents that are referred to the EO activity, namely the intermediate and annual reports.

It relates to ISO 21001:2018 Clause 5.1.2, as it also addresses learners and other beneficiaries.

On the other hand, the Action Plan determines processes for the revision of activities, the institutional dialogue for the continuous improvement of the VET offer and the application of the continuous improvement cycle. With these activities, the EO determines the risks and opportunities that need to be addressed to give assurance that it can achieve their intended outcomes, enhance desirable effects, prevent, mitigate or reduce undesired effects and achieve continual improvement.

The document is essential for the EQAVET:2019 implementation methodology and is updated whenever it is necessary, according to the organization's needs or the public authority orientations.

The document targets the whole EO interested parties, namely the founders of the organization, companies of the sectors served by the school, as well as internal staff and other providers. But it is, essentially, an internal document, for the support of EQAVET:2019 implementation.

2.5 Template for Risks-Actions

The template for Risk-Actions tabulates the ISO definition of risk and its columns are divided in two main sections:

1. the description of the risks
2. the description of the actions to address the risks.

The first section contains fields to describe the deviation from the expected that can arise from the state of deficiency of information related to the understanding, or knowledge, of an event, its consequences or likelihood – in other words, to describe the effect of uncertainty, which is the ISO 21001:2018 definition of risk. It also contains fields to describe those potential events and consequences, as well as its likelihood of occurrence; and the source of the risk, when this is known.

The second section contains field to record the decisions regarding the acceptability of the risks, as well as to categorize and describe the actions taken or to be taken to address the risk.

The intent of this table is to facilitate deeper, evidence-based, reflections about risks and boost a systematic approach on how to address them.

2.6. Template for Risk Matrix

According to ISO, risk is the effect of uncertainty, and an effect is a positive or negative deviation from what is expected. Therefore, the risk analysis should analyse both threats and opportunities.

Risk analysis is a process that is used to understand the nature, sources, and causes of the risks that you have identified and to estimate the level of risk. It is also used to study impacts and consequences and to examine the controls that currently exist. How detailed your risk analysis ought to be will depend upon the risk, the purpose of the analysis, the information you have, and the resources available.

Risk can be identified during a SWOT Analysis, an audit, a top management review, during the normal processes of the educational organization, etc. The “Template Risk Matrix” identifies first the origin of the risk. The educational organization should identify any risks to processes, organization, Reaching the goals, impartiality, lack of resources (material and

human), etc. Should be considered, as well as, internal and external factors that can, in any way, be a risk (threat or opportunity).

The Risk matrix is a simple tool that allows organization to identify the risk, classify it and define the measures according to the risk classification. It also allows organizations to register the control (evidence/efficiency) of each measure.

2.7 Template for Indicators

The template for indicators serves to define indicators to monitor the performance of the quality management system processes, based on the aim of each process and the planned targets to reach. It also contains fields to define the monitoring method in which the indicators will be used – in other words, how the indicators will be used – as well as the periodicity of its application and who is responsible for doing so. Besides serving as a monitoring plan, the template can also be used to support records, as it includes fields to register the results obtained and any comments to those, as well as the evidence in which the results are based and its location, to assure full traceability.

2.8 Template for Integrated Improvement System (SIM)

The template for Integrated Improvement System, also known as the SIM table, is a master management tool, which allows for a systematic approach to early identification and analyses of problems and potential problems, as well as evidence-based decisions on how to act on them and how to follow-up those actions to assure its effectiveness.

The table is divided in four main sections, containing a set of columns to:

1. identify the situations
2. analyse the situations
3. define actions to address the situations
4. define methods to verify the implementation of the actions defined
5. define methods to verify the effectiveness of the actions implemented

The tool was also designed to serve both as a supporting document (with columns' titles that are self-explanatory and provide users with guidance on how to handle situations) and as a record (by providing fields to insert information that will allow for future traceability of situations and actions taken to address them). Across time, the information inserted in this tool constitutes a good repository for organizational knowledge based on lessons learned. Any organization who effectively implements this tool and uses it realistically will be very well positioned to master continuous improvement in the long term.

3. Cluster Theme 3

3.1 Cluster Description

Educational organizations, due to the nature of the services they provide, deal with substantial amounts of data, including personal data. These need to be controlled and protected, not only to comply with data protection legislation common in many countries and regions of the world, but also to assure that relevant, up-to-date information is available to those who need it to fulfil their duties. ISO 21001:2018 is more detailed and prescriptive in this matter than EQAVET:2019, dedicating two clauses (7.5 and 8.5.5) to the matter. While both, EQAVET:2019 and ISO 21001:2018 address the need to protect personal data, ISO 21001:2018 also requires that controls to assure the fitness-to-purpose and updateness of documented information to support the operation of the processes and the reliability of the records that provide evidence that activities have been conducted as planned.

Template for Document Control and Template for Document Master List are alternative. Organizations should choose the one that best fits their needs.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/data-protection-and-control/>

EQAVET Criteria

1.9. Measures are designed to ensure compliance with data protection rules

ISO 21001 Requirements

7.5 Documented information

8.5.5 Protection and transparency of learners' data

3.2 VET21001 Tools – Cluster 3

Template for Document Control and Template for Document Master List are alternative. Organizations should choose the one that best fits their needs.

Tool Title

Template for Document Control

Document Master List

Template for Privacy Policy

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

3.3 Template for Document Control

The template for Document Control was developed in order to control Internal supporting documents, External supporting documents and Records.

It starts by identifying the process to which the document is allocated. The several characteristics of the document, such as identification, description, format, the person /job role responsible for the review and approval, version, access, distribution, location, access protection, preservation, retention and disposition.

The obsolete documents and control should also be included in the document control.

3.4 Document Master List

Document Control is a requirement of most Quality Assurance Standards, including ISO 21001:2018. The Document Master list was created with the intention of providing Institutions with a tool to easily manage such a requirement. The template is formatted in such a way to enable users to record the important details pertaining to every document forming part of their Quality Management System (QMS).

A document control list/tool can take many forms. This particular version provides users with a selection of minimum data/information which is to be recorded as part of this process. Although the form provides this particular selection, it does not preclude users from adding further information and/or details according to the needs of their organization. It is highly recommended however, that the minimum sections provided as part of the template are kept and duly recorded.

Apart from the recording of individual document data, the tool also includes a DCN Register (sheet 2). DCN stands for Document Change Number, and as the name suggests, this register enables users to keep track of the individual changes applied to a given document. In some cases, the same document may be updated multiple times throughout the course of an academic year. Each change would update the revision of the document, thus creating a situation where various revisions are released, potentially making users lose track/focus of these changes. By registering the individual changes via the DCN Register, users would be able to track these individual changes, thus forming an audit trail providing further visibility on the development of a given document.

3.5 Template for Privacy policy

In training services, the acquisition of personal data of users/learners is constant. The goal of the privacy policy statement is to inform them about how their data is being processed. It should be accessible to your users and formulated in clear and simple language, providing the relevant information about what personal data you are acquiring and processing, for what purpose, how you disclose and disseminate it to internal and external parties, what rights the user can assert, who are responsible, and how you protect it. The following template is intended to provide a simple basis for developing a privacy policy statement in situations where services or activities performed by the organization require the acquisition of data processing consent from the user.

4. Cluster Theme 4

4.1 Cluster Description

Organizational knowledge is what gives an organization its power, resilience and what distinguishes it from its peers and competitors. While artificial intelligence (AI) doesn't take over, organizations rely mostly on their human resources as a repository of organizational knowledge. As this is dynamic and changes across time, early identification of competence gaps and capacity building programs to address them is of paramount importance.

Both EQAVET:2019 and ISO 21001:2018 recognize this and dedicate several sections to requirements regarding:

- Clear definition and communication of responsibilities and authorities
- Awareness and Involvement of staff in quality management
- Timely identification of competence gaps
- Deployment of capacity building programs through peer-learning, mentoring, training, etc.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/knowledge-and-human-resources/>

EQAVET Criteria

1.4. Responsibilities in quality management and development have been explicitly allocated
1.5. There is an early involvement of staff in planning, including with regard to quality development
2.2 Relevant and inclusive partnerships, including those between teachers and trainers, are explicitly supported to implement the actions planned
2.3 The strategic plan for staff competence development specifies the need for training for teachers and trainers
2.4 Staff undertake regular training and develop cooperation with relevant external stakeholders to support capacity building and quality improvement, and to enhance performance

ISO 21001 Requirements

5.3 Organizational roles, responsibilities and authorities
6.2.1
7.1.1.2
7.1.6 Organizational knowledge
7.2 Competence
7.3 Awareness
7.1.2 Human resources

4.2 VET21001 Tools – Cluster 4

Tool Title

Template for Processes-Competences
Template for Job Description

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

4.3 Template for Processes-Competences

See Description in Cluster 2

4.4 Template for Job Description

Competence applies to any work that directly or indirectly affects organizations' ability to consistently deliver products and services that meet applicable legal and regulatory requirements and improve customer satisfaction. A job description is used to determine the competences required for each organizational role to achieve a job performance that will ensure expected results in line with the organization's performance objectives. These competences can be determined for a single group or for groups of similar jobs with each other. Beware because this need is not fixed but can change over time and should therefore be reviewed periodically and not only when a new job position is implemented within the organization (i.e., when there are new job specifications, new operating instructions, new technologies, when plans are made for the adoption of new equipment, when an analysis of nonconformities, customer complaints and other issues dictates that new skills must be sought to improve the situation).

Determining necessary competence entails identifying the required results or outcomes of a job, position, task or role, the criteria or standards of performance to be achieved, the evidence required and the method for achieving them (refer to table for processes). The starting point, then, is to define the outcomes expected from a job in order to define, consistently, what makes those who perform it successful practitioners and to establish the basis for competence assessment and development.

Organizations beginning to work on this could start with a risk-based approach, determining the potential impact on product and service compliance and customer satisfaction of not applying the competence requirements in certain cases. This requires the organization to determine and map the competences needed by the person(s) whose work falls within the scope of the standard and which affects the efficiency and effectiveness of the management system, and to ensure that those individuals are competent by education, training or experience.

Establishing the necessary competencies for all job roles helps focus the minds of managers and employees on what criteria are important for achieving certain performance within a particular job role. This helps significantly during the human resource recruitment and growth processes of the organization, as well as in identifying skills mismatches and professional development opportunities for the staff coherently with individual job roles and organization's objectives. Where there are mismatches between the competencies needed and those

possessed by personnel, action should be taken to enable them to acquire the necessary competencies (see Training plan).

4.5 Template for Planning and Monitoring Training

The template covers the relevant information to achieve the benefits of structured competency management: i) training needs analysis to identify gaps in individuals' knowledge and skills with respect to their job role and the changes and outcomes the organization intends to achieve; ii) planning and scheduling of necessary development and training activities consistent with identified training needs and objectives; iii) implementation and monitoring of training interventions, including costs, status, durations, training providers, and type and area of training; and iv) follow-up of each individual's progress and retention of related documented information.

5. Cluster Theme 5

5.1 Cluster Description

Stakeholders, also called interested parties are, by ISO definition those who can affect, are affected by, or perceive themselves as being affected by, the organization.

Both EQAVET:2019 and ISO 21001:2018 recognize the importance of their involvement in two distinct phases of the plan-do-check-act continuous improvement cycle:

- In the PLAN phase, to identify needs and expectations for the educational products and services
- In the CHECK phase, to verify to what extent the products and services provided fulfilled those needs and expectations.

To enable this, educational organizations need firstly to thoroughly identify their interested parties and their relevant requirements (needs and expectations) and secondly, to establish communication channels to survey them periodically.

Under this framework, ISO 21001:2018 emphasizes giving voice to learners with special needs and including their requirements in the design and development of the educational products and services.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/involvement-of-stakeholders/>

EQAVET Criteria
1.3. Ongoing consultation with social partners and all other relevant stakeholders takes place to identify specific local/ individual needs
1.7. The relevant stakeholders participate in the process of analysing local needs
3.3. Evaluation and review include the collection and use of data, and adequate and effective mechanisms to involve internal and external stakeholders

ISO 21001 Requirements
4.2 Understanding the needs and expectations of interested parties
5.1.1 m)
7.4.2 Communication purposes
8.2.1
8.3.2 Design and Development planning
9.1.2 Satisfaction of learners, other beneficiaries and staff
9.1.3 Other monitoring and measuring needs

5.2 VET21001 Tools – Cluster 5

Tool Title	
Surveys and questionnaires to communicate with stakeholders	Business Satisfaction Assessment Report
	Monitoring and follow-up report of the ex-students of Aveiro vocational school
	Teacher Evaluation Survey (by students)
	Students' Assessment
Students' Satisfaction Survey	
Parents' Satisfaction Survey	
Post Course Questionnaire	
Intern and Tutor Satisfaction Survey	

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

5.3 Template for Interested Parties

The template for interested parties is based on the definition of interested party/stakeholder given by ISO 21001:2018 and therefore has columns to categorize each interested party identified as:

1. being internal or external to the educational organization; and
2. affecting, being affected, or perceiving itself as being affected by the educational organization.

Other columns exist to identify the interested parties and to describe the way it affects, is affected or perceives itself to be affected by the educational organization.

The table is organized in such a way to allow the identification of interested parties to be done by process, instead of for the organization as a whole. The advantage of doing this identification by process is that it facilitates the identification of more interested parties that might be relevant for a given process, but not for the whole organization, and which might be missed otherwise.

The template provides a structured and systematic approach for identifying interested parties.

5.4 Surveys and questionnaires to communicate with stakeholders

Surveys to evaluate the involvement of interested parties and achievement of goals are one of the tools that can be used.

The surveys should be created according to the objectives, goals and requirements defined by each educational organization.

Some templates and Use Cases from a VET School (both templates and use cases are from several different years and different between them, according to the goals defined by the VET school under the EQAVET system). All the documents (survey templates and survey use cases) also comply with ISO 21001:2018 as they specifically focus on learners and other beneficiaries satisfaction.

Guideline of evaluation questions to ex-students – interview (template)

The educational organization, a VET school, every two years, conducts an analysis to access if the former students of the organization, after completing their studies, are employed, studying, etc.

This document is essential for both the management review as well as for the verification of the EQAVET implementation and objectives established by the educational organization in each EQAVET cycle.

Monitoring and follow-up report of the ex-students of Aveiro vocational school (Use Case)

After conducting the Survey “**evaluation questions to ex-students – interview**” the information is compiled in a document. In this document the responses of the former students, based on the template “Guideline of evaluation questions to ex-students – interview” are analysed according to three answers: former students are working, continuing further studies, looking for a job, at the army or migrants.

Based on these results, the school is able to determine if the goals defined for the student were reached and, if necessary, improve the future students support in order to reach the goals.

The evaluation is done separately for each course.

This document is essential for both the management review as well as for the verification of the EQAVET implementation and objectives established by the educational organization in each EQAVET cycle.

Business Satisfaction Assessment Report (Use Case)

Most of the VET programmes offered by the educational organization are based on the national dual system with a strong component of apprenticeship and work-based learning aiming to meet the needs of the labor market and boost employability. The educational organization has more than 500 protocols with different enterprises in the region (with whom we work in a very close way). These enterprises are an important stakeholder and therefore their satisfaction is very importance to our educational organization.

The report is important for management review and continuous improvement of the partnerships established between the school and the companies, as well as, accomplishing the EQAVET objectives established by the educational organization.

Student's Assessment (Students Assessment & Students evaluation about teachers) [Templates]

The students Assessment is evaluated through two different surveys:

- **Students' Assessment** this survey includes the Students' Self-assessment, as well as, the satisfaction in relation to the school facilities, materials, etc.
- **Teacher Evaluation Survey (by students)** -The students also give feedback about the teachers.

Both surveys are important to rate the overall satisfaction of the students and to improve the school services and to verify if the objectives defined in the management review and EQAVET:2019 are being reached.

Both surveys are conducted every year targeting all students of the educational organization.

5.5 Students' Satisfaction Survey

The Educational Organization implements, every year, a survey on students in order to know their satisfaction concerning the programs' contents, teachers/trainers, pedagogical materials and the premises/resources. The document is essential for the EQAVET:2019 implementation methodology since it provides us with an updated information on students' satisfaction.

The document targets the Educational Organization's recent former students.

This document is related to all the other documents that are referred to the satisfaction evaluation, namely the survey on parents' satisfaction. It relates to ISO 21001:2018 Clause: 5.1.2, as it specifically addresses to students' and other beneficiaries' satisfaction.

5.6 Parents' Satisfaction Survey

The Educational Organization implements, every year, a survey on parents in order to know their satisfaction concerning the interaction with the school, communication, premises/resources and administrative services. The document is essential for the EQAVET:2019 implementation methodology since it provides the Educational Organization with an updated information on parents' satisfaction.

The document targets the current students' parents.

It is related to all the other documents that are referred to the satisfaction evaluation, namely the survey on students' satisfaction. This document relates to ISO 21001:2018 Clause: 5.1.2, as it specifically addresses to parents' satisfaction.

5.7 Post Course Questionnaire

The satisfaction and perceived quality questionnaire is administered at the end of the course, prior to the certification/qualification exam. It includes a socio-personal section with categorical variables and a series of self-anchoring scales (scores 1 to 10) on the quality of specific aspects of the course: 1) Organization and logistics; 2) Guidance activities; 3) Knowledge/skills acquired; 4) Teachers; 5) Conditional section relating to any laboratory activities and therefore to be completed only if these have been carried out; 6) Conditional section related to any distance learning activities; 7) Conditional section relating to WBL activities, company visits and testimonials to be filled out only where these have been carried out; 8) Section relating to actions that the learner intends to take at the end of the course.

5.8 Intern and Tutor Satisfaction Survey

The questionnaire is administered every 2 months and at the conclusion of the WBL pathways to monitor progresses both from the point of view of the beneficiary and the company mentors. The dimensions of learning, integration in the workplace and compliance between the training project drawn up at the beginning and the activities assigned/performed are investigated. It is a quick and streamlined tool that does not burden monitoring activities incentivizing a mechanical compilation by both stakeholders.

6. Cluster Theme 6

6.1 Cluster Description

Partnerships with external entities are a smart way educational organizations have to overcome competence gaps, reinforce their capabilities, and respond timely to customer requirements.

But while outsourcing processes, products and services is a management tool capable of mitigating several operational risks, it also brings challenges to assure the quality of what is provided externally.

Aware of both these opportunities and challenges, EQAVET:2019 and ISO 21001:2018 contain requirements for the establishment of partnerships and how to control them. ISO 21001:2018 is particularly detailed regarding criteria to select, evaluate and re-evaluate external providers and to verify and accept their provisions.

Note: The term “provider” is used with different meanings by EQAVET:2019 and ISO 21001:2018. EQAVET:2019 uses it to refer to the educational organizations – the VET provider – and ISO 21001:2018 uses it to refer to external partners to the educational organization, who provides them with products, services or processes to incorporate in the educational services offered.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/partnerships-and-providers/>

EQAVET Criteria
1.6. Providers plan cooperative initiatives with relevant stakeholders
2.2. Relevant and inclusive partnerships, including those between teachers and trainers, are explicitly supported to implement the actions planned

ISO 21001 Requirements
7.1.1.2
7.1.6 Organizational knowledge
7.4.2 Communication purposes
8.4 Control of externally provided processes, products and services

6.2 VET21001 Tools – Cluster 6

Tool Title
Supplier Evaluation Chart
Template to Control External Providers
Template to Plan Internal and External Communication

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

6.3 Supplier Evaluation Chart

Supplier evaluation is a term used by organizations to evaluate and approve their existing and potential suppliers through a series of assessments. This evaluation consists of a series of questions based on parameters like competency, capacity, consistency, quality, etc., with a view to assessing the suppliers to ensure an approved portfolio via the application of Supplier Evaluation Tools.

Evaluating suppliers can be challenging, hence, the best practice is to create an evaluation form that will help organise and evaluate the suppliers more efficiently. This evaluation form is essential in order to monitor and measure the supplier's performance to reduce the cost associated with the activities, analyse risk management and maintain scope for constant improvement in selecting the suppliers.

The Carter 10Cs model that is recognised worldwide, and on which this tool is based, looks into the aspects of evaluating the supplier before being appointed. The 10 Cs are listed below:

1. Capacity – Does the supplier have the bandwidth to deliver?
2. Competency – Is the supplier diligent and can complete the task in a given period of time?
3. Consistency – Is there a consistent output from the supplier?
4. Control of process – Does the supplier offer flexibility and have systematic control over process?
5. Commitment to Quality – Is there a system established by the supplier that works constantly for quality management checks?
6. Cash – Is the supplier financially independent or is there third party involvement?
7. Cost – Are the products and services offered by the supplier cost-effective?
8. Culture – Does the supplier have a good work culture and market reputation?
9. Clean – Does the supplier have a legitimate licence, does not favour uncertified professionals and is risk management certified?
10. Communication efficiency – Does the supplier have the latest means of communication to answer queries?

Based on these important parameters, the supplier organization can be asked to furnish all the details right after the screening process is completed.

The supplier Evaluation Form will equip any organization with the capacity to easily identify the correct suppliers for a specific need. Evaluating suppliers will provide organizations with the peace of mind that they are ordering from a reputable source, and that therefore risks will be minimised. Moreover, the records and assessments done for suppliers following each service, will provide a clear picture of the supplier's consistency, thus providing organizations with the information needed on whether the supplier can be considered as an Approved Supplier. The questions asked in the evaluation form help organizations come to a solid conclusion whether or not the supplier should be appointed or re-appointed in the future.

Other benefits of having an evaluation form ready for supplier evaluation include:

1. Helps in assessing any risk involved: If an organization is not aware of the supplier, getting an assessment done prior to ordering will help the organization know their supplier and they can assess any risk associated with appointing them. Moreover, if the same supplier is appointed multiple times, and their evaluation is always positive, it will grant further confidence to the organization that the risks are mitigated even further. As Carter 10Cs model suggests, risk management can be associated with capacity, competency, and commitment to quality.

2. Helps in protecting the brand reputation: Through these evaluation forms, organizations can appoint suppliers with a good market reputation and, in turn, minimize any risk associated with tampering their brand reputation. Carter's 10Cs model suggests, brand reputation can be associated with control of the process, clean (has a legal license) and culture.

3. Helps in stimulating the cost factor: There are various cost factors associated with appointing suppliers. A huge sum of money is invested by organizations during the selection process. By having a systematic evaluation form, organizations can understand the overall ability of the suppliers to fulfil the organization's expectations and requirements. Similarly keeping such records for all suppliers may save the organization money in the future, given that the organization may opt to appoint a previously evaluated supplier thus saving itself any additional evaluation costs. Associating with Carter's 10Cs, the cost factor is in tandem with cost and monetary competency.

6.4 Template to Control External Providers

The template to control external providers tabulates the detailed requirements contained in ISO 21001:2018 - as these are more detailed than EQAVET 's - to identify, select and evaluate/re-evaluate external providers, as well as to verify the fitness for purpose of the products/services they provide so a decision regarding its acceptance can be made.

The template contains fields to first organize the products and services provided by external providers in categories, as typically, external providers of the same "family" which provide products and services of the same nature, share criteria. Therefore, starting by doing this organization enables a more efficient evaluation process, as criteria can be determined per category, saving substantial time and effort, particularly to educational organizations that depend on many external providers.

The template also contains fields to identify the associated process of the management system or, in other words, the process that will receive the externally provided product or service – which will also be identified in the template - as an input.

Depending on the nature of the product or service externally provided, there might be a risk of counterfeiting and this should also be identified in the template, together with the measures deployed to control this risk. Also depending of the nature of the product or service externally provided, its impact in the quality of the products and services provided by the educational organization to their learners and other beneficiaries varies and should be identified in the template as high, low or negligible impact. High impact requires the definition of stronger

criteria to control the external providers and the products and services they provide than low impact. Negligible impact doesn't justify the effort necessary to implement systematic control external and these can therefore be skipped.

The template proceeds with fields to identify the external provider under evaluation and the criteria defined to select them and to periodically evaluate their performance after being selected. It also contains fields to define the criteria needed to verify the products and services when they are delivered and to decide on its acceptance.

The template finalizes with a section to identify the qualification status of each external provider and to add any relevant comments to that status.

7. Cluster Theme 7

7.1 Cluster Description

The quality of educational products and services depend, to a significant extent, on the fitness for purpose of infrastructures and the work environment created by/in them.

The concept of infrastructure includes building and spaces, both physical and virtual, but also any kind of equipment, from basic furniture to sophisticated laboratory devices - and all need to be controlled in one way or another.

Less tangible, but not less important, resources such as assessment of learning instruments, employability surveys or satisfaction questionnaires also need to have their fitness for purpose validated.

Still on the less tangible side, assuring an adequate work environment in education implies controlling not only physical aspects such as light, noise, temperature, hygiene, etc., but also psychosocial aspects such as stress, bullying, work-family balance, quality of leadership, values in workplace, etc.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/infrastructure-and-work-environment/>

EQAVET Criteria

2.1. Resources are appropriately internally aligned/ assigned with a view to achieving the targets set in the implementation plans

ISO 21001 Requirements

7.1 Resources

7.1.1 General

7.1.3 Facilities

7.1.4 Environment for the operation of educational processes

7.1.5 Monitoring and measuring resources

7.2 VET21001 Tools – Cluster 7

Guidance on typical infrastructure in educational organizations

The infrastructure of educational organizations vary significantly from one organization to another, as many aspects impact the needed infrastructure – such as the scientific area of the learning programmes delivered, the delivery format used, the pedagogic model followed, etc. An organization that delivers natural science programs might need a biology laboratory, while one that delivers information technology programmes might need a computer laboratory. An organization that delivers programmes in e-learning will need a learning management system, while an organization that delivers presential programmes will need classrooms and adequate

furniture. If the programmes are offered with a partial or full board approach, the educational organization might also need cafeterias and dormitories. Additionally, to the infrastructure requirements derived directly from the characteristics of educational programmes offered, other infrastructure needs may arise from basic or supplementary services offered by the educational organization to their learners and other beneficiaries. This includes libraries, sports facilities, medical facilities, resting and leisure spaces, among others.

Below we provide a list of common infrastructure elements that can be found in educational organizations:

Spaces associated with educational products and services

- Classrooms
- Laboratories
- Libraries
- Sports facilities (for programmes in this scientific/technical area of the programme)
- Vehicles (cars, boats, airplanes, etc. if pertaining to the scientific/technical area of the programme)
- Etc.

Spaces associated with supplementary services provided to learners:

- WCs
- Studying spaces
- Leisure and resting spaces
- Administrative services areas
- Reprographies
- Cafeterias and kitchens
- Dormitories
- Medical facilities
- Sports facilities
- Etc.

Other Resources (Equipment, Devices, tangible and non-tangible tools and Instruments, etc.)

- Vehicles (school buses, cars, boats, airplanes, etc. - sometimes needed for pedagogical reasons according to the scientific/technical area of the education services delivered)
- Laboratory equipment, including monitoring and measuring resources
- Kitchen equipment, including monitoring and measuring resources
- Non-tangible tools and instruments:
- Psychology and career guidance tools, such as psychometric scales and vocational surveys
- Management tools, such as learner satisfaction and alumni tracking surveys
- Pedagogic tools, such as assessment of learning Instruments - e.g., tests, exams and assignments
- Etc.

The above list is not exhaustive and many other elements exist. It is the responsibility of each educational organization to identify the elements of infrastructure that are needed to adequately deliver the educational products and services they offer to learners and other beneficiaries, and to decide which ones they have internal capacity to provide and which ones require partnerships to be established so they can be provided by external suppliers. In any case, both EQAVET:2019 and ISO 21001:2018 require not only that this identification is done, but that the adequate infrastructure is in place. ISO 21001:2018, being more prescriptive also requires that the infrastructure is adequately maintained. This includes preventive and corrective maintenance, such as adequate configuration and validation of its fitness for purpose. And it applies both to the infrastructure and the work environment related to it. Examples:

- A biology laboratory with the adequate equipment, measuring devices adequately calibrated and adequate conditions of hygiene and asepsis to allow that experiments done can provide the expected results.
- A classroom with sufficient furniture for the number of students that will attend classes in it and adequate conditions of lighting and noise reduction through double glass windows, but also through values of studying in silence and of respecting colleagues when they speak by also keeping silence.
- A cafeteria with sufficient furniture to seat the number of students that are supposed to have a meal in each time slot and adequate cooking equipment to cook the meals, which an ISO 22000, HACCP (Hazard Analyses of Critical Control Points) or similar system implemented to assure food safety.
- A dormitory with sufficient furniture to seat the number of students that are supposed to live there and security measures in place, from fire alarms to door keys and security agents, assure the safety and security of the on boarded students.
- Etc.

Given to its complexity, dedicated Guidelines to non-tangible resources are provided in this toolkit.

Guidance on control of non-tangible resources: Psychology tools

When educational organizations offer psychology services to learners, psychologists use scales to support their work. A few common examples are:

- Scales used to assess cognitive ability – e.g., Weschler Intelligence Scale for Children (WISC)
- Scales used to diagnose neurodivergences or functional impairments – e.g., Conners scales for ADHD, Weiss Functional Impairment Rating Scale, Autism Spectrum Rating Scales (ASRS)
- Scales used to assess vocational identity – e.g., VIS, VIM
- Etc.

Unlike physical equipment and devices, which can be calibrated to assure its fitness for purpose (as required by EQAVET:2019 implicitly and by ISO 21001:2018 explicitly), these non-tangible tools require a different process: The educational organizations will need to assure

that only scales that have been scientifically validated are used. Particular attention should be given to the nature of each scale to determine if these are culturally sensitive. If they are, re-validation in the culture of the user group might be necessary – to be noted that a simple translation of the tool does not assure its fitness for purpose in a culture different from the one in which the tool was initially validated. Another situation that constitutes a threat to the validation of these tools is its usage partial usage – for example, by selecting items to be used. Developing a new tool with parts of different (validated) tools will not create a new validated tool – the new tool will need to go through a scientific validation process.

Guidance on control of non-tangible resources: Management tools

Educational organizations use a multitude of management tools to monitor and measure different issues. For example:

- Satisfaction – of learners and other beneficiaries, of staff, of partners
- Alumni tracking - e.g., to check employability rates of study programmes

These tools are usually home-developed in the form of surveys and, unlike physical equipment and devices, which can be calibrated to assure its fitness for purpose (as required by EQAVET:2019 implicitly and by ISO 21001:2018 explicitly), these non-tangible tools require a different process: The educational organizations will need to assure that only surveys that have been previously validated can be used. Examples of methods that can be used to do so, are:

- Validation by Expert Panels - e.g., DELPHI method
- Pre-testing a small group with monitored reaction
- Etc.

Guidance on control of non-tangible resources: Assessment of learning instruments

The most important activity of monitoring and measuring in education is related to the assessment of learning – in other words, determining what learners have learned. The results of these activities provide relevant information to modulate the learning services – in the case of formative assessment – and to decide on the certification of qualifications – in the case of summative assessment. Given the impact of these decisions on the conformity of the learning services, educational organizations need to trust the results provided by the assessment of learning instruments they use. However, there are many threats to its reliability and, consequently, to the validity of its results:

- Each learner may have a better or worse performance depending on the type of questions chosen for a given test/exam – e.g., due to individual talents, individual communication styles, personality, stress, etc.;
- The same student may have a better or worse performance depending on the day in which takes the test/exam – e.g., due to mental and physical health conditions;

- Different graders may grade the same content differently – e.g., due to previous experience, halo effect, etc.
- The same grader may grade differently the same content, depending on the moment in which performs the task – e.g., due to fatigue and health conditions, halo effect, etc.

Considering the above, assessment of learning instruments should not be used without being validated. There are several statistical techniques that can be used to do so, such as the Kuder-Richardson Coefficient for multi-choice questions and the Cronbach Alpha for open questions. Both measure the internal consistency, providing results between 0-1 and the higher the internal consistency, the better the reliability of the test/exam. Additionally, non-statistical methods, such as pre-tests with monitored reaction, can be used.

In some circumstances, although technically possible, it might be unviable financially to use statistical techniques nor pre-tests to validate the assessment of learning instruments, as the re-use of the instrument will not bring return on investment. After all there is a significant difference between an exam needed to achieve a Microsoft certification, which will be applied for years all over the world; and a test used once in a secondary school located somewhere in the globe. In those case, educational organizations should at least assure a systematic approach to the process of developing assessment of learning instruments. This can be done by establishing minimum requirements regarding competence, the process and the instruments. Examples are:

- Competence requirements:
 - Educators understand the threats to the reliability of the assessment of learning instruments and, consequently, to the validity of its results; and
 - Educators know how to mitigate these threats while designing and developing formative and summative assessment of learning instruments.
- Process requirements:
 - A diversify of methods are used
 - A diversify of instruments are used
 - Results are used to increment the “True Score” across time.
- Requirements for instruments
 - Instruments are designed by multi-cross-discipline teams
 - Type of questions used is diversified
 - Number of questions per instrument is incremented
 - Objective grading criteria is pre-defined
 - Blind and double grading are implemented

- Etc.

8. Cluster Theme 8

8.1 Cluster Description

Education services are complex and its development comprises different core phases, such as design, planning and delivery, including preparation and delivery of classes, assessment of learning and certification of competences and qualifications achieved by the learners.

Given this complexity, the overall quality of educations depends on many aspects and each step of the process(es) associated plays an important role, as the quality of each process/activity output will influence in different manners the quality of the service as a whole.

For this reason, both EQAVET:2019 and ISO 21001:2018 contain clear and at times, highly prescriptive, requirements to assure these different phases are conducted in such a way to contribute to the excellence of the final results.

Examples are:

- The ISO 21001:2018 requirements for the minimum information to be considered while designing educational services – being at the level of programmes, courses and/or classes;
- The emphasis both EQAVET:2019 and ISO 21001:2018 put on adopting a learner-centered approach, including consideration of the needs of learners with special needs (on both ends of the spectrum – impaired learners and gifted learners, as all may require adaptations to the learning services being provided);
- The added-value of controlling all phases of the service through a systematic approach, including planning and monitoring, considering documented information such as procedures and forms to support the operations and documented information, such as records, to provide evidence regarding to which degree planned results are being achieved;
- The need to assure the reliability of the assessment of learning process, based on the fitness-for-purpose of the instruments used in it, which need to be capable of providing valid results regarding what learners actually learned.

EQAVET:2019 and ISO 21001:2018 requirements also cover educational services that are provided in partnership with the working market, such as apprenticeships, traineeships and internships, but given the recent tools published by other ERASMUS+ research consortia and by ISO to control design, delivery and quality control of work-based learning (WBL), we recommend the following sources as complementary information to the VET21001 Toolkit:

For WBL in the healthcare sector:

- [ISO IWA 35:2020 Quality of learning environments for students in healthcare professions – Requirements for healthcare education providers in care settings](#)
- [HEALINT Protocol](#) and its iteration, the [HEALINT4ALL Protocol](#)

For cross-sector WBL:

- The Apprenticeship Quality Toolkit
- The Collection of Guides “Easy Apprenticeships for Small Business”:
 - 1 – Getting started: Setting up and launching an apprenticeship Scheme
 - 2 – Maximising the business case for participation: Designing profitable apprenticeship programmes
 - 3 – Effective Introductions to your business – Onboarding Apprentices
 - 4 – Assisting Apprentices in Learning to Work: Effective Mentoring

Link to Cluster on VET 21001 Website: <https://vet21001.eu/design-and-delivery-of-services/>

EQAVET Criteria

2.5. VET providers’ programmes enable learners to meet the expected learning outcomes and become involved in the learning process
2.6 VET providers respond to the learning needs of individuals by using a learner – centred approach which enable learners to achieve the expected learning outcomes
2.7. VET providers promote innovation in teaching and learning methods, in school and in the workplace, supported by the use of digital technologies and online-learning tools
2.8. VET providers use valid, accurate and reliable methods to assess individuals’ learning outcomes

ISO 21001 Requirements

8.3 Design and development of the educational products and services
8.5 Delivery of the educational products and services
8.6 Release of the educational products and services

8.2 VET21001 Tools – Cluster 8

Tool Title

Proposal Form for the Approval of New Programmes
Template for Course Curriculum
Template for Grading & Feedback (tests and written assignments)

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

8.3 Proposal Form for the Approval of New Programmes

This tool carries a mechanism that enables users to design and/or update VET programmes to better address current and future student and labor market needs, thereby providing stakeholders with the most recent information on market developments and requirements. This tool is therefore to be used as a template for the creation of the proposal of a new programme

or the updating of an existing one. Most of the sections require the user to describe the new programme/update at length, including detailed information on separate sheets and attaching them to this form to compile the report.

The salient reason for this is the integration of identification of training needs within the design, development and approval process of programmes, as well as during the cyclical review process. As per college policy and procedure, the design, development and approval of new accredited programmes and the review of existing programmes are key processes of any educational institution. Interested parties/proposers need to submit a form that indicates key information that is required to be submitted in the proposal. This includes Internal and external stakeholder feedback from, for example, students, alumni, industry, employers, NGOs, etc. This process involves collaboration between various offices/departments within the institution to ensure that the programme being developed is of the best quality and suitable for the needs of the target audience.

The intention of this tool is to create different platforms whereby key stakeholders in education and training work together to develop programmes that are relevant and sustainable and that recognise the input from industry.

Stakeholders including academics, students and those hailing from industry and NGOs, etc., are asked to provide feedback on the level of the programme, content, learning outcomes, delivery approach, relevance and other general comments. This data is to be consolidated input for subsequent programme development and review.

8.4 Template for Course Curriculum

The template for course curriculum was designed in a way to allow the educational organizations to identify critical aspects of the curricula, which not only support class planning, but also serve as a tool to communicate with learners and other beneficiaries.

The template is self-explanatory and contains fields to describe:

- Course identification
 - Course name and when applicable, the programme of study to which it belongs
 - Pre-requirements, when applicable
 - Level, by reference to the European Quality Framework (EQF) or equivalent (e.g., ISCED), when applicable
 - Form of delivery (presential, e-learning, blended)
 - Timeline (delivery dates and when applicable, reference to semesters or other timeline identification)
- Responsibilities

- Curriculum Authors
- Teaching team
- Any applicable Learner Support contacts (Programme, Administrative, IT Support, etc.)
- Qualification and certification information
 - Form of certification
 - Credit System and number of credits earned, when applicable (e.g., ECVET, ECTS, etc.)
 - Contact hours and, when applicable, autonomous study hours expected from learners
- Pedagogy
 - Learning objectives
 - Pedagogic methods
 - Form of learning assessment and, when applicable the weight of each learning assessment element

Bibliography (documents, articles, standards, books, podcasts, videos, etc.)

8.5 Template for Grading & Feedback (tests and written assignments)

The template for Grading & Feedback can be used to implement a systematic approach to grading coursework, from tests and exams to group work assignments, supporting the definition of objective criteria to grade them at the design phase and then supporting the records of the grading attributed to each learner and the feedback to be provided to them.

The template contains fields to identify the type of coursework and its elements, which criteria apply to each of them and what are the maximum grades that can be attributed to each element and its total. It can support formulas to automatically calculate the final grade. It also contains fields to record the feedback to be provided to learners so they can better understand their grade and what they can do to improve their competences.

9. Cluster Theme 9

9.1 Cluster Description

Evaluation is a core phase of quality management. Both EQAVET:2019 and ISO 21001:2018 base their approaches in the continuous improvement cycle developed by Shewhart and disseminated worldwide by Deming, also known by plan-do-check act. Its third phase – check – is when organizations collect and analyse information to determine if activities have been performed as planned and envisioned results are being achieved.

EQAVET:2019 is not as prescriptive as ISO 21001:2018 regarding how organizations should implement these evaluations, but ISO 21001:2018 has specific requirements for internal audits to be performed, suggesting, inclusively, that the good practices on how to audit management systems contained in ISO 19011 are used as guideline.

The set of Templates provided as tools to help implement this cluster are complementary to each other, with information entered in one usually being used by another. For this reason, in this cluster our recommendation is for users to adopt them as a set and not only one or two, which might disrupt the information flow.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/analyses-evaluation/>

EQAVET Criteria

3. Evaluation of outcomes and processes is regularly carried out and supported by measurement
3.1. A methodology for evaluation has been devised, covering internal and external evaluation
3.2. Stakeholder involvement in the monitoring and evaluation process is agreed and clearly described

ISO 21001 Requirements

7.2.1
9.1.2.1 Monitoring of satisfaction
9.1.3 Other monitoring and measuring needs
9.1.4.2
9.1.5 Analysis and evaluation
9.2 Internal audit
9.3.2 Management review inputs

9.2 VET21001 Tools – Cluster 9

Tool Title

Template for Internal Audit Plan
Template for Audit Checklist
Template for Audit Interviewees List
Template for Audit Evidence List
Template for Audit Report

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

9.3 Template for Internal Audit Plan

The template for Internal Audit Plan was designed in line with the recommendations in ISO 19011 Guidelines for auditing management systems, which is internationally consensually considered good practices for auditing. It therefore contains fields to characterize an audit in terms of audit context (type, criteria, objectives, scope, duration and audit team identification), as well for a detailed description of the planned activities, such as which processes are expected to be audited in each time slot, by which audit team members and towards which criteria and which auditees are expected to participate. The allocation of processes to criteria and the identification of expected interviewees has two added values:

- triggers the curiosity of the auditees to (re)read the criteria applied to the processes they're responsible for or collaborate with, which has a pedagogic effect;
- serves as quick-reference additional check list to guide the audit team during the audit and allowing for self-monitoring of their effectiveness and efficiency.

9.4 Template for Audit Checklist

The template for Audit Checklist is supposed to be filled in two different moments:

1. Before the audit: columns audit criteria should be filled before the audit and allows for a more detailed and personalized view on the criteria to be used by each auditor. If in the audit plan the criteria are usually identified by their number, here is can be identified with the content of the criteria in full (useful option for unexperienced or too experienced auditors), or with criteria transformed in questions or itineraries of expected objective evidence to be seek; or with key words or in any other way that facilitates the auditor's job. Different auditors have different auditing styles and different needs, and audit checklists should be personalized to fit them.
2. During the audit: the remaining columns should be filled while the audit is being conducted. At the field "Type of Finding" auditors are expected to categorize the finding (non-conformity, risk, opportunity for improvement, conformity, strong point) and at the filed "Supporting evidence" they should list the number of the evidence they collected (and registered at the Template for audit evidence list with a sequential number) that supports their judgement regarding that finding. In the field "Auditor's notes" auditors can pre-draft the text of the finding as it will appear in the audit report and add any other information that might be useful for the audit team, such as those needed to triangulate

information to validate the evidences. This allows for the traceability of audit findings, the justification of audit judgement and assures the transparency of the process.

9.5 Template for Audit Interviewees List

The template for Audit Interviewees List is a simple template for auditors to use while conducting an audit, where they can take note of the name and job role of each auditee they interview. The information entered in this template will support as needed the discussions held during audit team meetings and will feed the audit report.

9.6 Template for Audit Evidence List

The template for Audit Evidence List is used by auditors while conducting the audit and is meant to be a factual register of all objective evidences collected during the audit. It contains fields to describe the evidence and also to categorize it as collected by interview, by observation or by analyses of documented information. It is meant to be numbered in the same sequential order in which they were collected. This numbering will be reflected in the audit checklist and will avoid auditors to have to write more than once the description of a given objective evidence in the checklist, when it serves to justify the audit judgement toward more than one criteria.

The information entered in this template will support as needed the discussions held during audit team meetings and will feed the audit report.

9.7 Template for Audit Report

The template for Audit Report was designed in line with the recommendations in ISO 19011 Guidelines for auditing management systems, which is internationally consensually considered good practices for auditing. It therefore contains sections to:

- incorporate the audit plan, which will contextualize the audit and provide details for what happened at any given moment;
- identify the audit sample used in the audit;
- provide a brief summary of how the audit was conducted;
- provide a brief summary and also a detailed description of audits results – the set of findings arising from the comparison between the audit criteria and the objective evidences collected during the audit;
- state the audit conclusions – the audit judgement arising from the comparison between the audit objectives and the audit results;
- incorporate the audit evidences list.

The information contained in the audit interviewee list can be incorporated in the audit report in different ways: in the section “audit sample” as sample of staff interviewed; as entrances in the category of interviews in the audit evidence list, as an annex to the audit report (best option if signatures are collected), etc.

The audit checklist can also be added to the audit report as annex. It is very useful for the auditees as a pedagogic material matrixing audit criteria, evidences and findings. However, checklists should only be included in the annex if they are readable and do not contain notes with subjective emotional judgements (e.g., a note stating "*the management review record was in a terrible mess*" is not acceptable. A note stating "*the management review record didn't cover all input information required by ISO 21001 and EQAVET*" is acceptable).

10. Cluster Theme 10

10.1 Cluster Description

Continuous improvement is the heartbeat of any quality management system and its pace reflects its health status. All efforts dedicated to planning, doing as planned, and checking if envisioned results are being achieved have little value if the lessons learned along the way are not used to improve the processes. Act is the fourth and last phase of the PDCA cycle and can mean two different things, both leading to improvement:

- when, as a result of the check phase, the organization concludes that envisioned results are not being achieved, acting means determining if the causes are inadequate planning or inadequate implementation and apply corrections as needed;
- when, as a result of the check phase, the organization concludes that envisioned results are being achieved - in other words, the process is effective - then acting means implementing changes to the process to make it more efficient - in other words making it capable of achieving the same results with less resources.

Both EQAVET:2019 and ISO 21001:2018 put great emphasis on the importance of reviews as a mean to assure quality and its continual improvement, dedicating full sections to review requirements.

The Template for External Communication is positioned in this cluster but this application is transversal to all clusters, as they all contain requirements for communication, being it internal, external or both.

Link to Cluster on VET 21001 Website: <https://vet21001.eu/review-improvement/>

EQAVET Criteria
4. Review
4.1. Learners' feedback is gathered on their individual learning experience and on the learning and teaching environment. Together with teachers', trainers' and all other relevant stakeholders' feedback this is used to inform further actions
4.2. Information on the outcomes of the review is widely and publicly available
4.3. Procedures on feedback and review are part of a strategic learning process in the organization, support the development of high-quality provision, and improve opportunities for learners
4.4. Results/outcomes of the evaluation process are discussed with relevant stakeholders and appropriate action plans are put in place

ISO 21001 Requirements
7.4.2 Communication purposes
8.5.2 Identification and traceability...b) the study and employment paths of those who graduate or complete a course or programme of study, where applicable;

9.1.2.1 Monitoring of satisfaction
9.1.3 Other monitoring and measuring needs
9.3 Management review
10.1 Nonconformity and corrective action
10.2 Continual improvement

10.2 VET21001 Tools – Cluster 10

Tool Title
Template for Management Review
Template for communication

Note: It is highly recommended that users have a copy of the tools before reading the following paragraphs. Tools may be accessed via the links provided in the table above.

10.3 Template for Management Review

The template for Management Review was designed in line with the requirements in ISO 21001:2018, as those are more detailed and prescriptive but cover what is expected by EQAVET:2019.

The template provides sections to:

1. identify the period covered by the review
2. identify the participants in the review
3. address individually each input information required by ISO 21001
4. describe any decisions made as outputs of the review
5. allocate the outputs to the categories preconized at ISO 21001

As a whole, the template allows for preparation and reporting of management reviews, which can be performed synchronously, asynchronously or a mix of both.

10.4 Template for Internal and External Communication

The template for internal and external communication was designed based on the ISO 21001:2018 and tabulates clause 7.4 “Communication”, which contain requirements for educational organizations to define what needs to be communicated, to whom, how, when and by whom.

The template contains fields for all this information, plus precedes the columns with these fields with one to identify and organize the information by process. This approach enables a more in-depth analyses and planning of communication needs. Considering the complexity of educational organizations, its communication needs, both internal and external, are wide and diverse, as so are their communication channels and target audiences. If the reflection needed to identify all these is done for the educational organization as a whole, it is easy to miss relevant elements here and there. However, if the reflection is done by process, a more thorough identification of all needs, channels and target audiences is facilitated.

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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.



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