



PEER REVIEW FOR
GREEN AND DIGITAL
VET

Revision of the European Peer Review Methodology, Quality Areas and Toolbox

EU Digital & Green Peer Review Manual for VET+



KVALIFIKACIJŲ IR PROFESINIO
MOKYMO PLĖTROS CENTRAS



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1. PREFACE

Quality assurance and quality development are increasingly important in the world of education and training, throughout Europe. Different procedures have been introduced for evaluating quality at the level of VET institutions/providers. They include quality management schemes adapted from the business sector (such as ISO, EFQM, BSC, etc.), inspections and audits by Government agencies and self-evaluation.

Peer Review methodology – a form of external evaluation with the aim of supporting the reviewed provider in its quality assurance and quality development efforts, where an external group of experts called “Peers” is invited to assess the quality of different fields of the VET provision - well known in Higher Education was adapted to be used in initial vocational education and training (VET).

Since its development back into 2007, the European Peer Review for initial VET methodology¹ has been adapted and tested in several other education and training subsectors other than initial VET and linked activities (continuing VET, adult education/learning, vocational guidance, validation of formal and non-formal learning, etc) proving its “universality” but at the same time it distinguished character given by the **Quality Areas** developed to be applicable to different and varied forms of education and training and pedagogical processes.

This Manual tries to reflect this “universality” by describing the methodology as broadly as possible. The name of the Manual also reflects this intention by framing the scope of application of the methodology to providers of “VET+” instead of just VET.

So, through the Manual and in its tools, the terms “VET+ provider”, “VET+ institution”, “VET+ organisation” are used synonymously.

This Manual also embraces digitalisation and greening approaches to VET+ by: integrating the possibility of conducting Peer Reviews in a hybrid format; proposing the digitalisation of the procedure through the development of a [Digital Peer Review Platform](#) and a **Community of Practice** among VET+ institutions and professionals to support peer reviews; and by developing two specific quality areas: one focused on green education and training processes and another one on digitalisation to extensively cover the two core areas of the European strategy for a green and digital Europe.

The process of adaptation of the European Peer Review methodology, apart from conveying the coherence between the methodological framework and the principles pursued by the [Council Recommendation on VET for sustainable competitiveness, social fairness and resilience](#) (November 2020), especially with reference to mainstreaming digitalisation and environmental sustainability across the entire VET sector, followed several other principles:

- A wider approach to education and training by integrating criteria and indicators developed for other education and training subsectors or linked activities,
- Integrating improvements coming from previous experiences,
- Removing/optimising the aspects that have proven to be an excessive burden to peers/reviewed providers,
- Reinforcing existing elements that need to be reinforced,
- Simplifying the documentation of the Peer Review process,

¹ [The European Peer Review Manual for initial VET](#) was developed in the framework of the Leonardo da Vinci project “Peer Review in initial VET” in 2007, ISBN 978-3-901966-07-1.

- Avoiding duplication of data insertion in different tools/documents by taking full advantage of the potential of digital means,
- Reassessing the relative importance and strategic character of each tool to the Peer Review process,
- Modernise the set of criteria/indicators/evidences of the Quality Areas initially developed for VET, to cover new trends, challenges and developments in the education and training systems, at European and national level as well as recent developments in the learning and teaching process and in the organisational environment of VET+ institutions.

Peer Review promotes a culture of quality assurance and development and is a methodology appropriate to prepare for or complement other forms of external evaluation such as school inspections, ISO auditing, etc (e.g. it can be used before or after other forms of external evaluation to identify areas for improvement and to assess the extent to which the measures envisaged have been implemented).

Peer Review procedure as it is described in this Manual is aligned with the Recommendation of the European Parliament and of the Council published in June 2009 regarding a [European Quality Assurance Reference Framework for Vocational Education and Training \(EQAVET\)](#), and, furthermore, with the [Council Recommendation on VET for sustainable competitiveness, social fairness and resilience](#) (November 2020), replacing it. In fact, EQAVET framework provides a general approach to quality assurance that is valid for any kind of education and training provision. It comprises a quality assurance and improvement cycle of planning, implementation, evaluation and review, supported by common quality criteria, indicative descriptors and indicators. This is the reason why it is used as a benchmark in the context of this Manual. Furthermore, and resulting from the adaptation process, each of the quality areas defined (16) includes the four phases of a review process (planning, implementation, evaluation and review).

Peer Review is a useful method to involve and motivate staff, learners, working life and other key stakeholders in quality development from which both the reviewed provider and the peers can benefit.

Peer Review can build on quality activities already in place at an organisational level, it is cost-effective and it fosters networking, mutual learning, exchanges, trust and openness among VET+ providers.

The **European Digital & Green Peer Review Manual for VET+** was developed to be used by VET+ organisations and professionals across Europe. Its focus is on a practical approach: it offers directly implementable tools and guidelines for providers who want to introduce Peer Reviews in their quality assurance and development procedures, making the best use of digital means for the implementation of the process.

The Manual is, therefore, complemented by a **practical Toolbox** composed of different kinds of tools such as forms, checklists, templates, guidelines and tips available to be filled in directly or/and downloaded from the [Digital Peer Review Platform](#).

Those “renewed” tools (11) benefit from years of use since their initial creation in 2007, from a project extensive desk analysis of recent past testing/pilots of the methodology and from the results of the project consultation with experienced Peers and reviewed providers on their expectations on aspects that need to be changed, updated, reviewed in the European Peer Review methodology and in the supporting tools (Toolbox, Quality Areas).²

We hope that the European Peer Review methodology will live up to expectations and that the adaptations made could improve digitalisation and greening approaches to education and training systems and to teaching and learning processes and reinforce the usability, attractiveness and added value of such a quality assurance and development instrument for VET + institutions/providers all over Europe.

We would like to thank everyone involved in this work for their valuable contribution, many inspiring discussions, and important different perspectives to develop the quality of education and training systems in Europe.

Since we are dedicated to the further improvement of the European Peer Review procedure, feedback on this Manual will be very much appreciated!

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² For more information on findings and conclusions of desk research and consultation process please consult “[Cross Country Short Report](#)”, Peer Review for green and digital VET.

2. INTRODUCTION

2.1. What is Peer Review?

Peer Review is a form of external evaluation with the aim of supporting the reviewed VET+ provider in its quality assurance and quality development efforts.

An external group of experts, called Peers, is invited to assess the quality of different fields of the VET+ provider, such as the quality of education and training provision of certain departments or of the entire organisation. During the evaluation process, the Peers visit the reviewed organisation.

Peers are external but work in a similar environment and have specific professional expertise and knowledge of the evaluated subject. They are independent and "persons of equal standing" with the persons working in the department/area/service/specific VET+ provision of the reviewed organisation.

Peer Review promotes a culture of quality assurance and development and is a methodology appropriate to prepare for or complement other forms of external evaluation such as school inspections, ISO auditing, etc (e.g. it can be used before or after other forms of external evaluation to identify areas for improvement and to assess the extent to which the measures envisaged have been implemented).

2.2. Why Peer Review? Advantages and benefits of Peer Review as an instrument of quality assurance and development

European VET+ providers can expect to benefit from a Peer Review, as proposed in this manual, by:

- obtaining critical yet sympathetic feedback on the quality of their VET+ provision from colleagues in the field,
- becoming acquainted with an external perspective,
- ascertaining the quality of their provision,
- presenting their strengths and showcasing good practice,
- enhancing accountability towards stakeholders,
- detecting blind spots and weaknesses,
- receiving advice and discovering the good practice of Peers,
- engaging in mutual learning with Peers,
- establishing networks and cooperation with other VET+ providers
- obtaining an external evaluation report on the quality of their VET+ provision and at a comparatively economical cost,
- using it as an alternative or a complement to other forms of external evaluation (inspection, ISO auditing).

2.3. What are the aims and principles of the European Peer Review procedure?

2.3.1. General aims and principles

The general aims of the European Peer Review procedure are:

- to promote quality assurance and development,
- to enhance transparency and comparability of quality in VET+ in Europe through a common European standard,
- to support diversity, equity and inclusion,
- to foster digital and greening approaches to VET+ provision.

Important specific requirements and characteristics of the procedure are:

- a focus on the people involved and their interests and needs,
- objectivity and impartiality of the Peers,
- transparency of all elements of the procedure to all persons involved,
- rules on confidentiality and on the use of results, to be set up in advance and adhered to by all persons involved,
- avoidance of conflicts of interest and direct competition between Peers (and the institution they come from) and the reviewed VET+ provider,
- promotion of openness, integrity and sincerity as a prerequisite for mutual learning,
- awareness of cultural influences both in VET+ provision and in evaluation, especially in transnational Peer Reviews,
- promotion of an enquiring and critical attitude both in the Peers and the reviewed institution,
- the design and implementation of Peer Review not as a technical and bureaucratic procedure but as a dynamic and motivating process, from which both the reviewed VET+ and the Peers can benefit.

2.3.2. The European Peer Review as a voluntary and formative evaluation procedure

The European Peer Review procedure was developed for voluntary use by VET+ providers/institutions. It has a formative, development-oriented function and puts particular emphasis on the promotion of continuing quality improvement.

The European Peer Review assists the VET+ provider/institution in determining the status quo in terms of high-quality provision as well as providing valuable suggestions and recommendations for improvement. Thus, the primary addressees of the European Peer Review procedure are the reviewed VET+ providers themselves.

The main focus of the procedure described in this manual is the stimulation of continuous quality development.

Graph 1: Continuous Quality Improvement with Peer Review



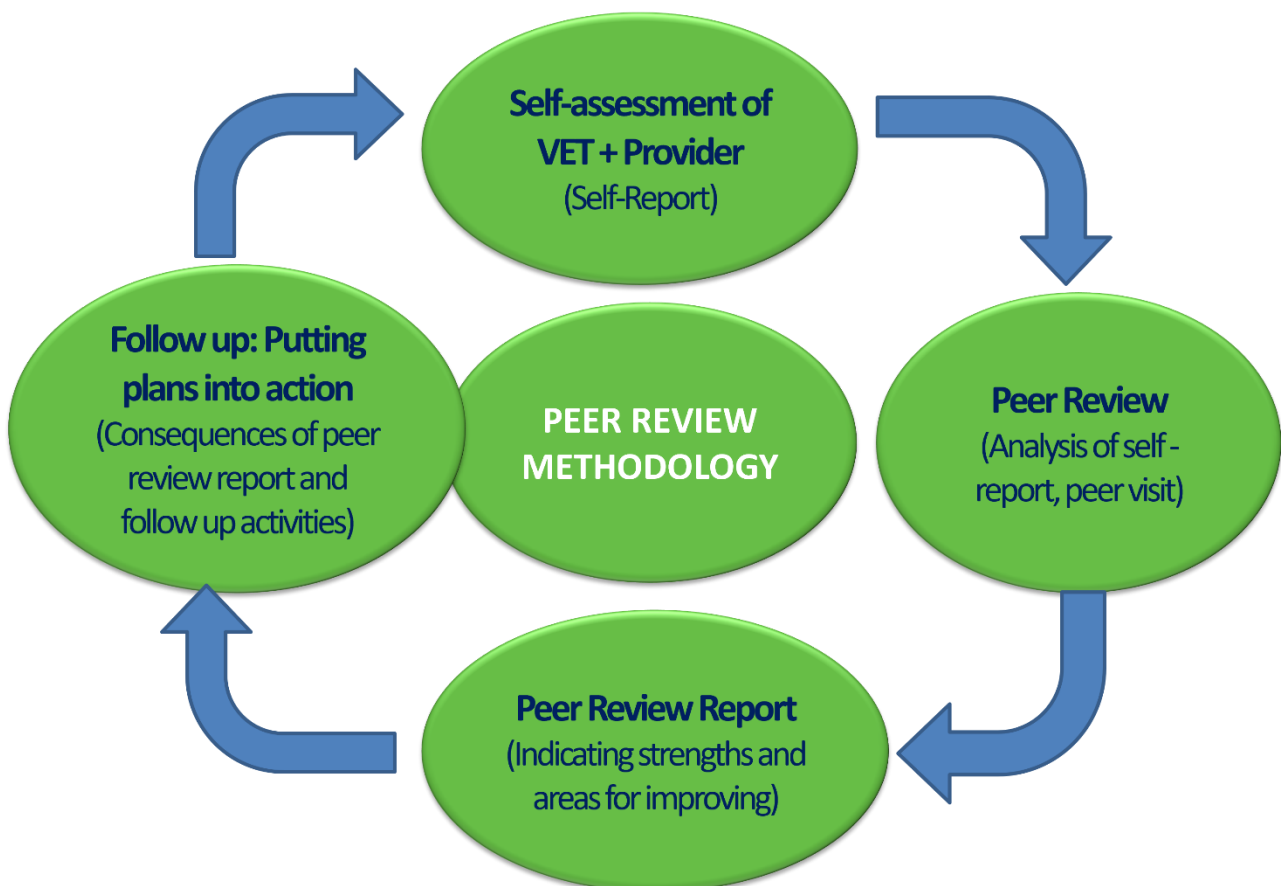
2.4. European Peer Review and the European Quality Assurance Reference Framework for Vocational Education and Training (EQAVET)

Even if originally developed prior to the publication of the Recommendation of the European Parliament and of the Council published in June 2009 regarding an European Quality Assurance Reference Framework for Vocational Education and Training (EQAVET), Peer Review procedure as it is described in this Manual is aligned with this recommendation and, furthermore, with the Council Recommendation on vocational education and training (VET) for sustainable competitiveness, social fairness and resilience of November 2020, replacing it. Although designed to be specifically applicable to VET (initial and continuing VET and for all learning environments, such as school-based provision and work-based learning, including apprenticeship schemes and all learning types, such as digital, face-to-face or blended), the EQAVET framework provides a general approach to quality assurance that is valid for any kind of education and training provision. It comprises a quality assurance and improvement cycle of planning, implementation, evaluation and review, supported by common quality criteria, indicative descriptors and indicators. This is the reason why it is used as a benchmark in the context of this Manual.

In fact, a quality assurance and improvement cycle is embedded within the European Peer Review methodology, too. Its elements comprise the quality circle prevalent in state-of-the-art quality management approaches and also referred to in the EQAVET framework. Furthermore, each of the quality areas developed and proposed in this Manual includes a quality cycle review: planning, implementation, evaluation and review, too.

Within this context, the European Peer Review and the set of quality areas defined can be used as a methodology for ensuring and improving quality in all subsectors of education and training, for any learning type and regardless the learning environment. It can be used for an extended internal assessment (self-assessment) as well as for external evaluation of the quality of the provision. As a systematic procedure, it can be depicted as follows:

Graph 2: EQAVET Quality Assurance Model and Peer Review



2.5. European Peer Review and Gender Equality

Gender mainstreaming is a guiding principle of the European Peer Review procedure. This means that within the quality assurance approach key professionals involved (Peers, Managers, key Stakeholders) should be all aware of the importance to identify, measure and monitor the different impact of the Peer Review on women and men, if relevant.

Therefore, the following gender criteria and quality standards must be observed in the European Peer Review procedure:

- Gender mainstreaming should be integrated at all stages and levels within the Peer Review procedures. This means that data should be available and assessed by Peers according to the specific Tool provided in the Toolbox,
- Gender-sensitive language must be used in all reports and during the Peer Reviews,
- Data collected are disaggregated by sex in order to represent women and men (female and male learners; female and male staff),
- A gender analysis of the Quality Areas should be undertaken in the Self-Report and in the Peer Review process,
- A Peer with gender expertise (as an additional competence) should be included in the Peer Review team or at least, the Peer Team as a whole should be if not specifically skilled on, at least aware of the importance of this topic and able to ensure that gender mainstreaming is considered throughout the process. The composition of the team should reflect an appropriate representation of women and men. Training needs in relation to gender and gender mainstreaming should be identified and met before the Peer Review,
- During the Peer Review, gender must be considered in the composition of groups of interviewees, in the preparation and conduct of interviews and observations (gender-sensitive formulation of questions and criteria for interviews/observations, gender-sensitive language and behaviour during interviews and observations) and in the analysis (avoidance of gender stereotypes in assessment, etc).

Before any Peer Review is undertaken, a gender analysis should be carried out on:

- the VET+ institution – the rights, resources, participation, values and norms related to gender (sex- disaggregated quantitative data, qualitative assessment as well, if possible),
- the review panel – composition, training needs in relation to gender and gender mainstreaming,
- the Self-Report – gender analysis of areas covered, use of language.

If measures are planned by the VET+ provider under review, to counteract gender inequalities then a gender impact assessment should be carried out. Gender impact assessment means using gender-relevant criteria to compare and assess the current situation and trend with the expected development resulting from the introduction of the proposed policy. A gender impact assessment should be carried out at an early stage once it has been established that the review process has implications for gender relations. Criteria for gender impact assessment refer to the differences between women and men with respect to participation, resources, norms and values, and rights. A more comprehensive list is available in the “Gender Equality Data - Checklist for Policy Indicators” within the Toolbox.

Gender mainstreaming is also considered within the Diversity, Equity and Inclusion Quality Area for the European Peer Review.

2.6. Who can use the European Peer Review procedure?

The primary target group for the European Peer Review procedure is providers of any form of education and training (e.g. initial and continuing VET, adult education/learning, validation of non-formal and informal learning, vocational guidance, etc) in Europe with practices regarding quality assurance and development or at least with the will to implement them. The minimum experience recommended as a basis prerequisite for conducting a Peer Review is that the education and training provider has previously undergone a self-assessment/evaluation process at least once.

In this Manual, the terms “VET+ provider”, “VET+ institution”, “VET+ organisation” are used synonymously. They encompass the institutions responsible for quality assurance and development primarily at the VET+ institution level but also at the level of the umbrella institutions if this is where quality assurance and development take place or is coordinated.

2.7. Role of stakeholders in the European Peer Review procedure

The involvement of various relevant stakeholder groups in the whole review process is highly recommended. Stakeholders in VET+ are all the people working and learning within a provider of VET+. Depending on the type of provision it can be: teachers/trainers, VET+ coordinators, managers, mentors, tutors, instructors, assessors, counsellors, learners/participants, administrative staff; also cooperation partners of the VET+ provider; parents; former learners/graduates; work-based learning enterprises/organisations; (potential) employers and the labour market; education and training authorities and social partners, and society at large.

It should be pointed out that particular consideration should be given to enterprises as cooperation partners in VET+ (work-based learning, apprenticeship scheme, internships, etc.) and actual or future employers.

Stakeholders can be interviewed both during the self-evaluation and the Peer Review. They may also serve as Peers if their special experience and know-how contribute to the process. Additionally, (groups of) stakeholders may also be interested in the outcomes of the Peer Review (e.g. the Peer Review Report).



2.8. Documentation of the European Peer Review

2.8.1. European Peer Review Portfolio

All relevant documents of the European Peer Review should be collected by the VET+ provider in a European Peer Review Portfolio. The European Peer Review Portfolio contains the Initial Information Sheet, the Self-Report, the Peer Review Report, and other important documents gathered during the Peer Review process.

Digital and Green: Within “Digital Peer Review for green and digital VET”, embracing the green and digital nature of the project, a digital peer review platform will be developed, where among others, there is a feature allowing to archive all peer review documentation.



3. EUROPEAN PEER REVIEW PROCEDURE - OVERVIEW

3.1. Coordination and organisation of the European Peer Review

Peer Reviews can be organised in different ways – depending on 1) the networks available, 2) the resources (personnel and finances), and 3) the needs and requirements of VET+ providers.

A single Peer Review can be carried out by a VET+ provider who wants to obtain some external feedback from Peers and intends to network with other VET+ providers in an ad hoc and spontaneous way by making use of existing contacts. There need not to be any further cooperation between the reviewed VET+ provider and the VET+ providers the Peers come from.

Mutual Peer Reviews between two VET+ providers are also possible, calling for stronger and steadier cooperation.

For the most part, Peer Reviews are carried out in a network of three or more partners. The networks either already exist or are set up for the purpose of carrying out Peer Reviews. This usually expands the cooperation from a one-off activity to more comprehensive networking: common preparatory activities like selection of Peers, training, matching Peers and VET+ providers, etc. may be introduced, as well as common reporting and monitoring schemes. A Peer Review network will usually also agree on common guidelines and indicators. All of this involves a more stable network and needs suitable structures and sufficient resources.

The added value of a network approach may be:

- synergies concerning the conduct of Peer Review between the VET+ providers in the network,
- an extension of the number and institutional backgrounds of possible Peers,
- a wider external recognition of the Peer Review (which will be fully accepted, at least within the network),
- a higher chance of possible spin-offs in terms of further cooperative activities beyond the Peer Review.

If Peer Reviews are to be carried out in a larger network, a coordinating body will be needed to ensure high- quality Peer Reviews and effective coordination of the network members. This function can also be assumed by one of the VET+ providers in the network. The tasks of this coordinating body comprise, for example, managing the network, coordinating the development of common procedures (guidelines and indicators), giving support and advice to the individual VET+ providers, selecting and training Peers, and coordinating and monitoring the Peer Reviews.

This is why the tasks and responsibilities of a coordinating body are also delineated in the European Peer Review procedure.

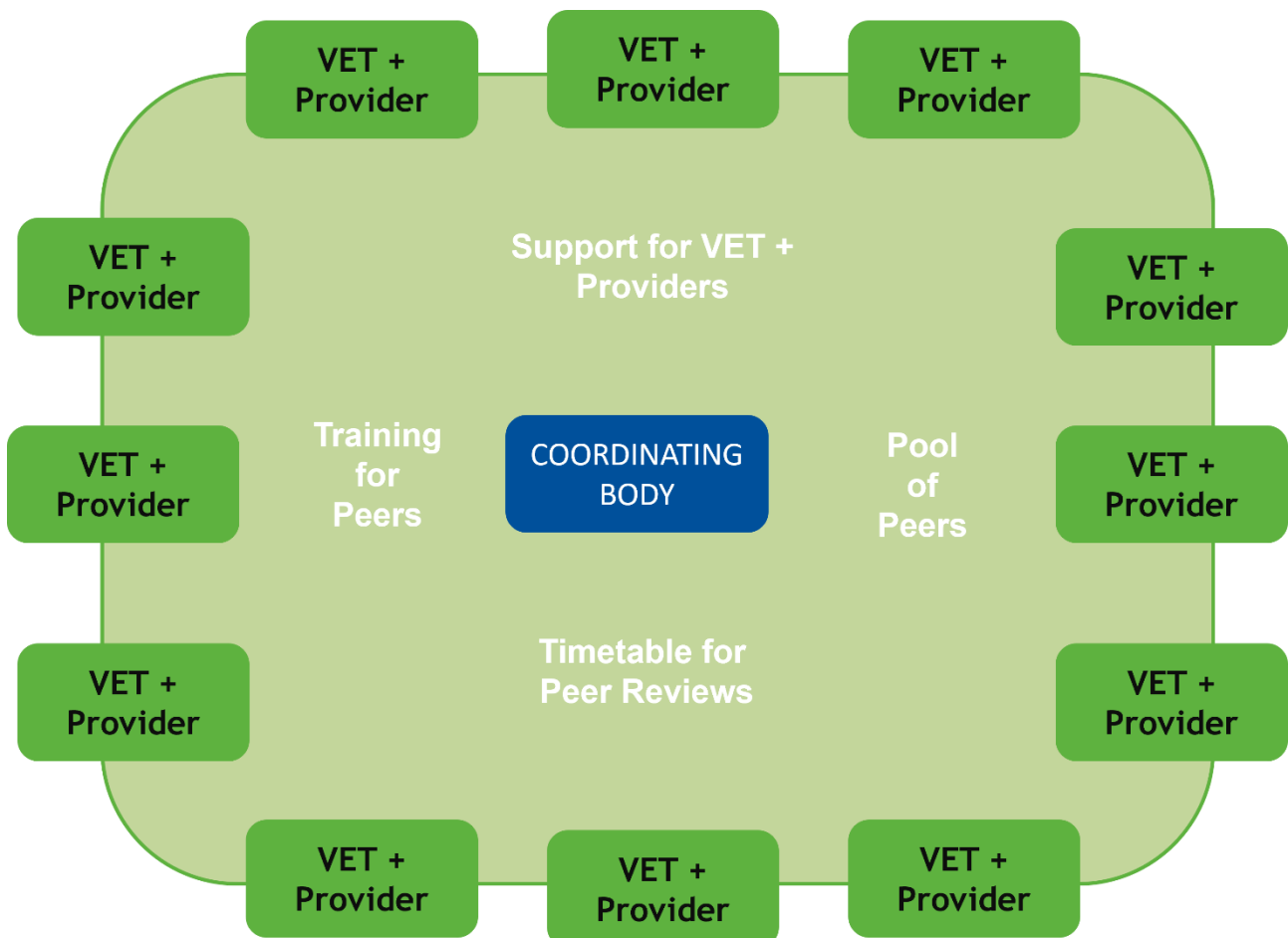


European Peer Review in Practice: coordination of Peer Reviews in the network

Since the first Leonardo da Vinci project “Peer Review in initial VET” where peer reviews were conducted based on a network of partners coordinated by one of the project partners, many other European funded projects (e.g. “EuroPeerGuid - European Peer Review in Guidance and Counselling in Adult Vocational Education and Training; “P.R.I.S.D.O.Q - Peer Reviews: Increasing Sustainable Development Of Quality”; “PRALINE - Peer Review in Adult Learning to Improve Formal and Non-formal Education”; “Peer Review between schools and vocational training centres”; “ONE – Networks for Quality Adults Learning”; “Strengthening VET Quality Assurance Systems and Processes”; EU funded projects to support the operations of the quality assurance national reference points for VET (EQAVET NRPs), etc) followed the same concept of having a coordinating body (most of the times one of the partners) to coordinate and monitor the Peer Reviews.

The research conducted to adapt the Manual emphasised the importance of Peer Reviews being run in a coordinated manner.

Graph 3: Peer Review in a Network

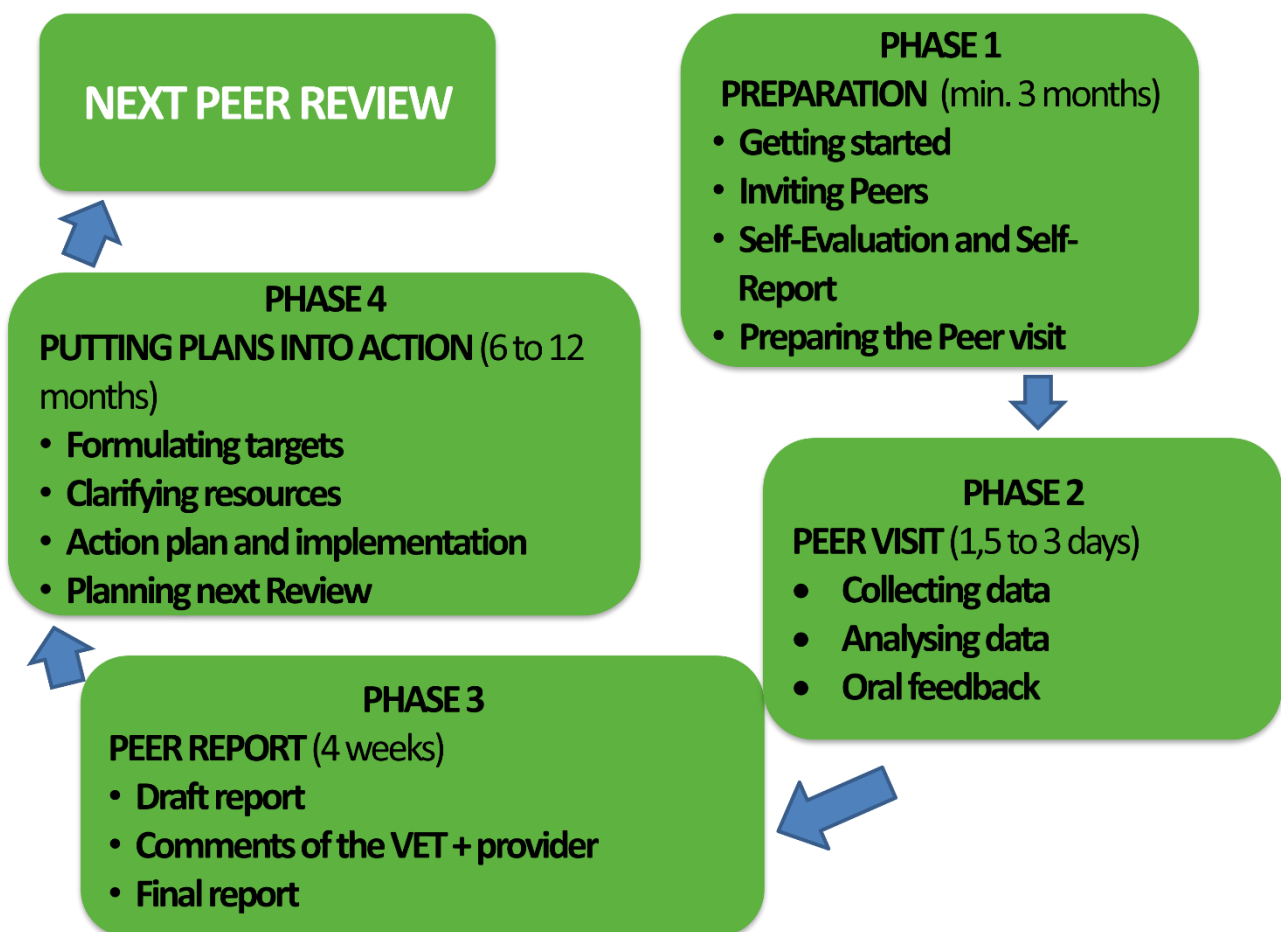


3.2. Four phases of a European Peer Review

The Peer Review procedure comprises 4 phases, as follows:

1. The Peer Review starts with a preparatory phase. In this first phase, the Peer Review is organised, and a Self-Report is written by the VET+ provider. Peers must be recruited and trained. A timetable for the review is drawn up and arrangements are made for the Peer Visit,
2. In the second phase, the Peer Visit, which is the core activity of the Peer Review procedure, takes place: Peers come to visit the VET+ provider and carry out an evaluation. This evaluation includes a tour of the premises and interviews with different groups of stakeholders. The Peers give initial oral feedback at the end of the Peer Visit,
3. After the Peer Visit, a draft report is drawn up by the Peers. This report is commented on by the VET+ provider and the final Peer Review Report is issued,
4. The fourth phase is crucial for the improvement of VET+ provision and organisational development: results and recommendations from the Peer Review are transferred into concrete actions for improvement, which are planned and implemented.

Graph 4: Four Phases of a European Peer Review



3.3. Estimated time needed for the European Peer Review

3.3.1. Time needed for preparation

Ample time is needed to adequately prepare and organise a Peer Review.

If a self-evaluation has already been conducted earlier, the Peer Review process can be started right away. At least three months, however, should be reserved for the preparation and organisation of the review. The Self- Report should be available at least one month before the Peer Review in order for the Peers to prepare adequately for the Visit.

If no self-evaluation has been carried out beforehand, a minimum period of six months should be scheduled for the self-evaluation, which must precede the Peer Review.

3.3.2. Time needed for Peer Visit and Report

The time needed for the Peer Visit depends on the size of the reviewed VET+ institution and the scope of the Peer Review, i.e. how many Quality Areas are to be investigated. It can take from 1 and a half day to 5 days. Experience gained in the different pilots of the methodology conducted within Peer Review projects suggests that Peer Visits of two days are the most suitable.

Time for preparatory work in the Peer Team before the visit need to be scheduled. Also time to write the draft report, to wait for and process the comments made by the VET+ provider and to write the Final Peer Review Report needs to be considered in the overall time needed.

Although no precise indications on the time needed are prescribed, indications on the maximum acceptable time between each of the steps are presented in the manual (see Chapter 6 for the detailed time schedule).

Digital and Green: While advocating for the criticality of face-to-face interactions during the Peer Review process, the use of technology and digital means for time saving and efficiency purposes is highly recommended.

Peers preparatory work before the peer visit can easily be conducted at distance taking advantage of online communication means. Preparatory videoconferences between peers and documentation preparation and sharing using technology can and should be used, saving time and natural resources.

The same applies to the exchanges necessary for the preparation of the Peer Review Report.

Face-to-face moments are precious for the process but should be used wisely. For the Peer Visit itself, for sure!

3.3.3. Time needed for the implementation of improvement measures and procedures for change

Within two months of receiving the final Peer Review Report, an improvement plan should be presented; at least six months to a year should be scheduled for follow-up measures to be implemented and take effect.

3.4. Overview: timetable and responsibilities in the European Peer Review

Table 1: Tasks of the VET+ providers, Peers and coordinating body in the European Peer Review procedure, in chronological order

PHASE 1 - PREPARATION
VET + Provider
<p>Get started:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Decide to carry out Peer Review <input type="checkbox"/> Decide on external organisation of Peer Review (single Peer Review, reciprocal Peer Review, Peer Review in a network) <input type="checkbox"/> Decide on internal organisation of Peer Review (responsibilities and tasks) <input type="checkbox"/> Decide on Quality Areas <input type="checkbox"/> Send/ulpload Initial Information Sheet (including a proposal for a rough time schedule) to the coordinating body <input type="checkbox"/> <u>Optional:</u> organise coordination meeting between the VET+ providers in the network and the coordinating body <p>Peers and Peer Team:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Look for suitable Peers regarding Quality Areas to be reviewed <input type="checkbox"/> Invite Peers to apply to the coordinating body <input type="checkbox"/> Select Peers in consultation with the coordinating body <input type="checkbox"/> Conclude Pact on Peers Collaboration <p>Self-evaluation and Self-Report:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Conduct self-evaluation <input type="checkbox"/> Write Self-Report <input type="checkbox"/> Submit Self-Report to Peers and to the coordinating body (if applicable) <input type="checkbox"/> Make other necessary documentation available to Peers and to the coordinating body <p>Preparing the Peer Visit:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Schedule Peer Visit: Set date and draw up Peer Review agenda <input type="checkbox"/> Organise preparatory meeting of the Peers (online or face-to-face) <input type="checkbox"/> Prepare local organisation of the Peer Visit (rooms and equipment, interviewees, lunch, tour of the premises, etc.) <input type="checkbox"/> <u>Recommended:</u> organise preliminary meeting between the Peers and the VET+ provider (it can be online or face-to-face) to clarify review assignments and to answer questions from the Peers ("Question and Answer Session")



PHASE 1 - PREPARATION

Peers

Peers and Peer Team:

- Submit/register application to become a Peer
- Sign Pact on Peers Collaboration
- Prepare for Peer Review and undertake Peer Training (look for hybrid training solutions)

Self-evaluation and Self-Report:

- Receive Self-Reports from VET+ providers
- Read and analyse Self-Report
- Identify areas for investigation and evaluation topics for the Peer Review

Preparing the Peer Visit:

- Assist in the scheduling of the Peer Visit, especially in the drawing-up of the Peer Review agenda
- Exchange opinions in Peer Team on the content of the Self-Report, agree on evaluation topics for the Peer Review
- Prepare questions for interviews and criteria for observation or other means of collecting data
- Take part in preparatory meeting of Peers for team building and to prepare the Peers Visit (online or face-to-face)
- Recommended: take part in preliminary meeting between Peers and the VET+ provider (it can be online or face-to-face) to clarify review assignments and to receive additional information, if necessary ("Question and Answer Session")

Coordinating Body

Getting started:

- Send information on Peer Review procedure to VET+ providers
- Collect/upload Initial Information Sheets
- Make an initial plan of the Peer Review schedule (master plan) by using the information on the Initial Information Sheets from VET+ providers (make the best use of digital tools to complete this task)
- Optional: organise coordination meeting between the VET+ providers in the network and the coordination body (online or face-to-face)

Peers and Peer Team:

- Look for suitable Peers – request, process and access applications
- Match Peers with the VET+ providers (regarding Quality Areas to be reviewed)
- Select Peers (in consultation with the VET+ providers)
- Supervise and assist with agreements with Peers

Self-evaluation and Self-Report:

- Receive Self-Report of VET+ providers
- Forward Self-Report to Peers (if not sent directly)





Preparing the Peer Visit:

- Scheduling of Peer Visit (in consultation with VET+ providers and Peers)
- Organise preparation and training for the Peers (hybrid solutions seems to be, according to the research conducted to adapt this Manual, the best option for training to peers' delivery)

PHASE 2 – PEER VISIT

VET + Provider

Support Peers in the following activities:

- Make equipment and rooms available
- Facilitate interviews and observations
- Facilitate a tour of the premises
- Receive feedback from Peers
- Engage in communicative validation

Peers

- Collect data
- Visit the premises
- Conduct interviews, observations or other means of data collection
- Analyse and discuss findings in the Peer Team
- Carry out a professional assessment and come to common conclusions
- Give oral feedback to VET+ provider
- Engage in communicative validation
- Carry out meta-evaluation in the Peer Team

Coordinating Body

- Optional: involvement in Peer Visits



Advocating for face-to-face Peer Visits!

The research indicates that Peer Visit is one of the moments where face-to-face interactions is of most value. If not possible that all the Peer Visit is face-to-face, then at least a “live” meeting with staff is highly recommended.





PHASE 3 – PEER REVIEW REPORT

VET + Provider

- Comment on the draft Peer Review Report

Peers

- Write Peer Review Report and submit it to the VET+ provider
- Receive comments of the VET+ provider and finalise Peer Review Report
- End of Peer involvement

Coordinating Body

- Optional: receive Peer Review Report
- Optional: involvement in writing or finalising the Peer Review Report

PHASE 4 – PUTTING PLANS INTO ACTION

VET + Provider

- Decide to follow up on the findings of the Peer Review and prepare an improvement plan
- Implement the actions foreseen in the improvement plan
- Plan and carry out the next Peer Review

Coordinating Body

- Optional: involvement in the follow-up of the improvement plans



4. EUROPEAN PEER REVIEW PROCEDURE – PREPARATION (PHASE 1)

4.1. Getting started

4.1.1 Decision to undertake a Peer Review

Starting a Peer Review involves:

- the decision to carry out a European Peer Review with high commitment by the management and other important stakeholders,
- the decision on whether the Peer Review should cover the whole institution or only parts of it,
- the decision on the aims and purposes of the Peer Review,
- the distribution of tasks and responsibilities including the appointment of a Peer Review Facilitator and a quality team,
- the decision on time and resources to allocate to the Peer Review.

Efficacy in terms of quality improvement depends on the cooperation and participation of the people involved. From the start, a high commitment by management (director, department heads, etc.) must be ensured, but also by staff (teaching/training and administrative staff) and other relevant stakeholders. This must also include explicit dedication to implementing procedures for change as a follow-up to the Peer Review Report in Phase 4 of the Peer Review procedure (Putting Plans into Action).

Responsibility for the coordination of all activities concerning the Peer Review should be assigned to a Peer Review Facilitator. S/he, as a member of staff, will be the link between the reviewed VET+ institution and the Peer Team reviewing the institution. S/he should be carefully selected because of the crucial role of the Peer Review Facilitator.

4.1.2. Decision on Quality Areas

The next step is to decide which Quality Areas should be dealt with in the Peer Review. The decision on the Quality Areas should be made by the management in agreement with staff and other important stakeholders, if possible. VET+ providers/institutions should only choose Quality Areas over which they have an influence. For an overview of the Quality Areas, please go to Chapter 8.

Issues that may be considered in the choice of Quality Areas are:

- Are there Quality Areas that are essential due to national/regional/local, etc. quality requirements and standards?
- Are there Quality Areas that show examples of best practice and excellence?
- Are there Quality Areas that urgently need to be reviewed, i.e. because problems have been detected?
- Are there Quality Areas that are particularly important, i.e. because new developments are to be initiated?
- Are there Quality Areas where innovation has taken place, which calls for an evaluation?
- Are there Quality Areas that are of particular interest to important groups of stakeholders?

The overall guiding principle for the selection of Quality Areas is their relevance.

Additionally, feasibility should be considered: the broader the range of Quality Areas to be reviewed, the more time and resources will be necessary for the review. A policy of "small steps" will be suitable especially for VET+ providers with little previous evaluation experience. (These may also decide to test the procedure for parts of their institution only.)

For a Peer Visit of two days, it is highly recommended that no more than two Quality Areas are chosen. Only very experienced Peers will be able to deal with more Quality Areas within this timeframe. Note that too many Quality Areas will either lead to a rather superficial evaluation or will force the Peers to narrow their focus to selected topics within the Quality Areas.

Furthermore, it may make sense to include areas which have previously undergone internal evaluation to reduce the self-evaluation effort.

Additionally, special evaluation questions can be formulated for the Peers: in addition to the Quality Areas, VET+ providers can give "assignments" to the Peers to pay special attention to specific issues and questions that are of particular importance to the VET+ provider. This will enhance the usefulness of the results of the Peer Review.

4.1.3. Initial documentation and information

The basic decisions concerning the conduct of the Peer Review should then be documented by the VET+ provider in written format. The "Initial Information Sheet" serves as internal documentation and as external information for the coordinating body (if applicable), the Peers, other VET+ providers in the network, etc. The form should be filled out and sent to the coordinating body in good time, i.e. at least three months before the Peer Review.

The "Initial Information Sheet" includes documentation of 1) contact information, 2) the starting situation, 3) the aims and purpose of the Peer Review, 4) how it is to be organised, 5) the internal distribution of tasks and responsibilities, 6) an overview of the procedure and a time schedule (which steps will be taken and when), 7) the scope of the Peer Review, 8) the Quality Areas to be reviewed, 9) further comments and 10) a list of possible Peers.



The form "Initial Information Sheet" can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

4.1.4. Optional: Coordination Meeting

If the Peer Reviews are organised as reciprocal reviews or in a network of VET+ providers, a meeting between the representatives of VET+ providers (and, if applicable, also the coordinating body) will improve the whole process.

The following activities can be part of the agenda:

- Introducing each other, short self-portraits of the VET+ providers,
- Expectations of VET+ providers, motivation of management and VET+ staff,
- Information on and discussion of the Peer Review procedure (purpose, targets, process and activities, resources and work-time for the persons involved),
- Competence profile for the Peers, mode of selection of the Peers
- Commitment of the management and the staff involved,
- If applicable: information and/or decision on the involvement of authorities,
- If applicable: contractual relations between 1) the VET+ providers and/or 2) the VET+ providers and the coordinating body,
- Further steps, time scheduling, questions.

4.1.5. Recommended: Agreements between VET+ providers and coordinating body

If Peer Reviews are carried out on a larger scale, it is sensible to put the duties and responsibilities of the different parties into a mutual written agreement.

Important issues to be covered by such an agreement are:

- Purpose of the agreement,
- Rights and duties, mutual expectations, conditions of network partners (and coordinating body, if applicable),
- Aims of the Peer Review procedure,
- Internal distribution of tasks and responsibilities,
- Costs,
- Data protection,
- Involvement of competent authority (if applicable),
- Action plan and responsibility for the implementation of the action plan,
- Procedure, steps, time scheduling.

4.2. Selecting and inviting the Peer Team

Once the decision on conducting the Peer Review and a selection of Quality Areas has been made, the VET+ provider and/or the coordinating body become active in recruiting Peers. The recruitment process depends on the way the peer review process is organised and on the kind of pre-existing structures. If there is already a pool of peers duly organised with registered peers, the identification of suitable peers is a relatively easy process.

European Peer Review in Practice:

According to the research conducted to adapt the Manual, having an (European) database/pool of peers accessible, easy to use and taking full advantage of the potential of technology and digital tools, with functionalities that facilitate the difficult task of matching peers and VET+ providers was considered as a key aspect for an efficient composition of the Peer Team and for an effective implementation of the Peer Visit.

If not, then, ad-hoc procedures need to be implemented. Preliminary information on the Peer Review procedure and the tasks of the Peers need to be sent out to prospective Peers. The Peers may come from other VET+ providers or stakeholder institutions.

Depending on the existence or not of a coordinating body, the coordinating body or the VET+ provider select and invite the Peers themselves. Remember: it is up to the reviewed institution to suggest and choose Peers, if they want, so take full advantage of it!

In an ad-doc procedure, it is advisable to have a standard application process. The use of a standard application form for Peers is, therefore, recommended.

Digital and Green:

One of the features available in the digital peer review platform is the possibility of, through simple drop-down menus with conditional choice options, filling in many of the tools foreseen in the methodology, as it is the case of the Peer Application Form (see below).



A “Peer Application Form” can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

Apart from the competences and experience of the Peers, availability is an important factor in setting up Peer Teams. Thus, the areas of expertise of the Peers must fit in with the Quality Areas to be reviewed while, at the same time, the time schedules of Peers and VET+ providers need to be compatible. The Peer Coordinator should be selected with great care: S/he will be the key person in the Peer Team with overall responsibility for the Peer Review process: communication and coordination in the Peer Team, time management, relations with the VET+ provider, etc. The choice of someone already experienced as peer can greatly influence the fluidity of the process and the full effectiveness of the peer review process. If an Evaluation Expert is to guide the Peer Review process, s/he must also be recruited.

European Peer Review in Practice:

One of the findings that stand out from the research carried out for the adaptation of the Manual is that the particular attention should be given to the composition of the Peer Team and to the right balance and match of soft skills and technical/ professional competences.

Further information on Peers and the Selection of Peers can be found in Chapter 9.

Either the VET+ provider or the coordinating body should also inform the Peers of their duties and tasks well in advance. Peers should therefore receive the "Initial Information Sheet" as well as a summary of what will be expected of them during the Peer Review. This information may also be attached to a formal invitation letter which should be sent out as soon as the matching of Peers and VET+ providers has successfully been carried out and a time schedule for the reviews has been fixed.

For reasons of transparency and data protection issues, an agreement between the VET+ provider and the peers is to be concluded.

Digital and Green | Optional:

According to the research carried out for the purpose of adapting the European Peer Review Manual, agreement between the VET+ provider to be reviewed and peers can be considered as an optional tool, to be used or not depending on the structure and way of organising the peer review (e.g. if the process is organised centrally by a coordinating body and there is already a pool of peers, then, such an agreement can be considered as not central/necessary for the process).

Nevertheless, it seems that there is still an important added value on a minimum formalization for reasons of transparency and data protection although in a simpler and less “contract oriented” form. For that reason, a new adapted tool was developed: Pact on Peers’ Collaboration, to be signed digitally by all the involved parties (VET+ provider and each of the peers) and focused mostly on practical and concrete aspects of the Peer Review implementation process, on duties and obligations of the parties and on confidentiality and data protection issues.



A “Pact on Peer’s Collaboration” can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

To sum up, the selection and invitation of Peers involves:

- consulting a pool of peers (if applicable),
- soliciting applications from Peers using a standard application form,
- selecting Peers according to their expertise and matching them with VET+ providers,
- optional: recruiting an Evaluation Expert to guide the Peer Review process,
- nominating a Peer Coordinator,
- setting up a timetable for the Peer Reviews,
- sending out information to the Peers on 1) the Peer Review procedure, 2) the VET+ provider they are to review, and 3) their duties and tasks,
- concluding a Pact on Peer’s Collaboration.

4.3. Self-evaluation and Self-Report

4.3.1. Recommendations for conducting a self-evaluation

A sound analysis of strengths and areas for improvement is a prerequisite for the Peer Review. A systematic self-evaluation of all Quality Areas selected for the Peer Review must therefore be carried out before the external Peer Review takes place and the results of the self-evaluation must be documented in a Self-Report.

The self-evaluation must be an investigation at institutional level (or at the level of departments, branches, etc. of an institution) but may be preceded and supported by individual evaluations of staff, especially VET+ staff. For the individual evaluations, a Peer Review procedure between

individual teachers/trainers can be introduced (cf. Gutknecht-Gmeiner, 2005: Part I: International Research and Analysis).

No specific self-evaluation procedure is prescribed for the European Peer Review. On the contrary, VET+ providers are encouraged to make use of assessments and evaluations already carried out in order to avoid duplication of efforts. Thus, if a self-evaluation has been conducted within a reasonable time (up to two years) before the Peer Review, the results can be used and need only be filled into the Self-Report. For areas or criteria not yet covered, additional evaluations must be carried out.

If a VET+ provider carries out a self-evaluation for the first time, recourse to guidance (and perhaps also consultation) is recommended. Suitable guidelines and handbooks on how to plan and carry out self-evaluations exist in abundance.

4.3.2. Quality criteria for self-evaluation

The self-evaluation can be performed in different ways. VET+ providers may choose a suitable procedure according to their interests, needs, and experience. It is recommended, however, that a clear and structured procedure is employed, which focuses on relevant Quality Areas and evaluation questions. Apart from a clear commitment by management and staff, the responsibilities and tasks involved in the procedure should be transparent.

The procedure should:

- be conducted in a transparent and fair way,
- involve all important stakeholders,
- employ suitable evaluation methods, and
- entail adequate sharing of information and results.

Feasibility of the self-evaluation in terms of time and resources must be ensured from the start.

4.3.3. Self-evaluation profile: assessing strengths and areas for improvement

During the self-evaluation, strengths and areas for improvement should be identified for the Quality Areas reviewed. Actions to be taken for improvement should also be discussed and indicated in the Self-Report. A SWOT analysis, for example, is a well-known, simple and time-efficient procedure for obtaining a profile of performance in the Quality Areas chosen. Strengths and areas for improvement should be identified at the level of the criteria of the individual Quality Areas (cf. Chapter 8).

4.3.4. Self-Report

The Self-Report is the central document of the Peer Review procedure: it should contain all information necessary to prepare the Peer Review. It must therefore tackle all the topics to be evaluated during the Peer Review.

While VET+ providers are free to choose their methods and procedures for the self-evaluation, the Self-Reports should be standard and uniform to promote comparability. The description of the self-evaluation results must be clear, concise, and meaningful. Evidence to buttress the assessments provided in the Self- Report should be furnished in an Annex.



A “Self-Report Form” can be found in the Toolbox box (available in [Digital Peer Review Platform](#)).

Digital and Green:

Within “Digital Peer Review for green and digital VET”, embracing the green and digital nature of the project, a digital peer review platform will be developed, where among others, there is a feature allowing to fill in all the documents/forms foreseen in the Peer Review procedure and where, taking full advantage of the interoperability of information, repetition will be avoided (e.g. information coming from the “Initial Information Sheet” will automatically be filled in the “Self-Report Form”), therefore, gaining time to focus on the distinctive aspects that characterise each document of the Toolbox and on the essential of the process and of the experience, clearing up the negative perception of time consuming and excessive bureaucratisation of the process reported by many VET+ providers and peers participating in previous experiences.

The first part of the report is an update of the Initial Information Sheet, which contains all relevant data on the Peer Review procedure.

The second part comprises a description of the VET+ provider and of the education and training provision offered, the mission statement, statistical data on VET+ provision, qualitative and quantitative information on the context of the institution and on learners’ population, and information on other organisational issues.

The third part contains information on quality assurance and development policies and measures in place and the fourth part (optional), its open to the description of any special self-evaluation/self-assessment done in preparation for the Peer Review.

Finally, the last part, the “heart” of the report, is dedicated to the results of the self-evaluation of the Quality Areas chosen. It should provide an assessment of the strengths and areas for improvement and also indicate special evaluation questions for the Peers. The latter will help the Peers in targeting the Peer Review to the topics of particular relevance to the VET+ provider. Additional documents can be attached in an Annex.

4.4. Preparing the Peer Visit

4.4.1. Tasks of the VET+ provider

After fixing the date for the Peer Visit and recruiting and inviting the Peers, the Peer Review Facilitator must make sure that the Peers receive the Self-Report and all necessary documentation no later than one month before the Visit.

4.4.1.1. Recommended: Meeting between the VET+ provider and the Peer Team

It is highly recommended, that a meeting is organised between the VET+ provider and the Peer Team in order to clarify questions from the Peers and discuss the agenda of the Peer Visit. This may comprise fine-tuning the evaluation questions for the Peers, making decisions on the evaluation methods and on the groups of stakeholders to be interviewed. The meeting can be online or face-to-face. Further information can be given to the Peers upon request. The outcome of the meeting is a detailed Peer Visit agenda.

4.4.1.2. Drawing-up an agenda for the Peer Visit

A detailed and realistic agenda for the Peer Visit should be drawn up by the Peer Review Facilitator. For this task, the Peer Review Facilitator should be aided by the Evaluation Expert and/or the Peers since the agenda will reflect the kind of evaluation methods that will be used and what stakeholder groups will be involved in the Peer Visit. Plan the agenda carefully to ensure a successful Peer Visit.

Focus on Results:

According to the research carried out for the purpose of adapting the European Peer Review Manual, particular emphasis on the objectives of the Peer Visit (contribute to quality improvement by providing external-internal friendly insights) should be given, so that the agenda for the Peer Visit is prepared having that in mind, not undermined by the understandable (but contra productive) will of the VET+ provider (but, sometimes, also, of the peers) to prepare an agenda that bring out “the best” and the good practices carried out by the reviewed provider.

Some guidelines for the preparation of an agenda functional to a successful Peer Visit were developed as well as a model for a two-peer tandem and a two-day visit (see below).



“Peer Visit Agenda: Guidelines & Template” can be found in the Toolbox (available in Digital Peer Review Platform – insert link).

4.4.1.3. Local organisation of the Peer Visit

Advocating for face-to-face:

According to the research carried out for the purpose of adapting the European Peer Review Manual, Peer Visit is one of the moments where face-to-face interactions is of most value. If not possible that all the Peer Visit is face-to-face, then at least a “live” meeting with staff is highly recommended.

The local organisation of the Peer Visit is undertaken by the Peer Review Facilitator, who is responsible for the smooth running of the Visit.

The local organisation of the Peer Visit entails:

- selecting interviewees,
- reserving rooms and equipment,
- making a plan of the VET+ provider premises and putting up signs giving directions (optional),
- inviting interviewees,
- informing and inviting other involved stakeholders,
- preparing refreshments and lunch, conducting a tour of the premises, etc.

Rooms should be suitable and free from disturbance. One room should be reserved for the Peer Team throughout the whole duration of the Peer Visit for interim sessions by the Peers. One spacious room should be reserved for the final feedback meeting between the representatives of the VET+ institution and the Peer Team.

4.4.2. Tasks of the Peers

4.4.2.1. Preparing for the Peer Review

To prepare for the review, the Peers need:

- to read and analyse the Initial Information Sheet and the Self-Report (and ask for additional information, if necessary),
- to attend a pre-review meeting with the VET+ provider (recommended; can be online or face-to-face),
- to attend Peer training,
- to exchange opinions on the content of the Self-Report in the Peer Team and agree on evaluation topics for the Peer Review,
- to draw up an agenda for the Peer Visit together with the Peer Review Facilitator,
- to attend a pre-review Peer Team meeting (the day/afternoon before the Visit; it can be online or face-to-face),
- to prepare interview questions and criteria for observation or other methods of data collection.

4.4.2.2. Peer Training Programme

Prior to the Peer Review, the Peers should undergo a "Peer Training Programme" that prepares them for their work as external evaluators (cf. Chapter 9.7).

4.4.2.3. Preparatory meeting of the Peers and preparatory meeting with the VET+ provider

It is vital that the Peer Team meets before the Visit in order to get to know each other and to prepare the Visit together. This will enhance team building and the efficiency of team cooperation during the review. It will make sense for the Peers to have read and analysed the Self-Report prior to this meeting so that first impressions can be exchanged and specific questions and topics for the Peer Visit can be discussed. If possible, this meeting (that can be online or face-to-face) should take place sometimes before the Peer Review to have enough time for preparation afterwards. In any case, it is recommended that Peers meet on the day before the first day of the Peer Review for last preparations. Additionally, the Peers may also meet with representatives of the VET+ provider to be reviewed (online or face-to-face). Providing an opportunity for a "Question and Answer Session" with the VET+ provider, usually represented by the Peer Review Facilitator, may greatly improve the process. This meeting is also recommended to take place ahead of time. If not otherwise possible, this exchange can take place on the day before the first day of the Peer Visit.

For efficient organisation of the preparatory activities, both meetings - the internal meeting of the Peers and the meeting of Peers and reviewed VET+ provider - can also be scheduled on the same day and/or, if possible, be linked to the Peer Training. Ideally, the whole Peer Team attends the face-to-face part of the Training Programme together. After or during the training, the Peers are joined by the Peer Review Facilitator (and perhaps other responsible staff of the VET+ provider).

Subsequent to the discussion with the representative(s) of the VET+ provider, the Peers hold their team meeting.



Graph 5: Responsibilities and tasks in the preparation of the Peer Reviews



5. EUROPEAN PEER REVIEW PROCEDURE – PEER VISIT (PHASE 2)

5.1. What happens during the Peer Visit?

During the Visit, the Peers conduct a brief and condensed evaluation, which focuses on the Quality Areas chosen by the VET+ provider. The basis for the evaluation is an analysis of the previously furnished Self-Report and other relevant documentation. During the Visit, the Peers check the accuracy of the findings of the self-evaluation documents and conduct their own investigation. All of this usually entails gathering additional data.

Different evaluation methods can be used. Apart from the analysis of the available documentation (which can be extended to encompass further written sources of information during the Visit), the most common methods are interviews and (focus) group discussions, as well as observations. The data collected must then be analysed and discussed by the Peers. Initial feedback is given to the VET+ provider at the end of the Visit.

Depending on the aims of the Peer Review, the Peer Visit can also be used for a more extensive exchange between Peers and representatives of the VET+ provider, comprising elements of Peer consulting.

5.2. Collecting data

The most common methods used for collecting data are:

5.2.1. Group and single interviews

Interviews are most often used in Peer Reviews. The aim is to collect as much information as possible from different stakeholders. Interviews may be conducted with single persons or with groups of persons (usually five to six, up to a maximum of about ten). Groups will be fairly homogeneous most of the time (focus groups), but groups with different stakeholder representatives are also possible. For important stakeholder groups, like learners and education and training staff, two independent interview groups can be organised to gather comprehensive feedback.

Who is to be interviewed?

Usually, representatives of all relevant stakeholders should be involved. The relevance of stakeholder groups depends on the Quality Area(s) reviewed. The VET+ provider will choose the types of stakeholders to be interviewed and can be aided in this decision by the Peers and the Evaluation Expert.

Groups of interviewees are usually:

- managers (representatives from the reviewed provider, head of institution, head of departments, head of the area/provision to be reviewed, etc.),
- staff (teachers/trainers, training coordinators, other pedagogical staff such as mentors, tutors, instructors, assessors, counsellors, etc.),

- learners/participants,
- former learners/graduates,
- other stakeholders, such as representatives of enterprises, suppliers, social partners, parents (if applicable), other education and training institutions, education and training authorities, organisations with responsibilities in terms of education and training quality assurance and development, etc.

Invitation of the interview groups lies within the responsibility of the VET+ provider who – for the sake of validity – has to make sure that a representative choice of interview partners is made within each group of stakeholders. The Peers, however, should furnish clear criteria for the composition of the interview groups and monitor compliance. When composing interview groups, particular attention must be paid to social aspects like formal or informal hierarchies, existing conflicts, diverse interest, etc., which can adversely affect the openness of the interviewees.



“Interview Guidelines” for the Peers can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

5.2.2. Tour of the premises

On an accompanied, face-to-face visit, the whole Peer Team or a Peer Tandem (the Peer Coordinator, who also writes the Peer Review Report, should ideally be included) assesses the infrastructure and equipment. In addition, informal information can be collected during this tour of the premises.

5.2.3. Peer observations

During a Peer Visit, observations can also be carried out. Classroom observations are most common but observations can also be conducted during practical training (i.e. in laboratories, workshops, etc.) and in other social situations (breaks, cantinas, cafeterias, outside areas, etc.).

If observations are to be carried out, they must be prepared well. The aim(s) and the subject of the observation must be defined in advance (together with the persons reviewed, if possible) and a systematic procedure for note-taking must be drawn up. In the assessment, the evaluations of the individual situations must be aggregated so that conclusions will focus on the VET+ provider as a whole and not on individual staff.³

Observations of specific teaching and learning activities can be linked to the tour of the premises, which will then take more time. Apart from the individual classroom visit, which usually focuses on a certain topic, whole classes may be shadowed throughout a day or all classes may be visited for a short time.

³ If serious problems are detected which concern a single person from the staff (teacher/trainer or other), feedback should do directly to the person concerned (and perhaps the Organisation Representative or the Head of the unit/department/service) but must not be mentioned in the Peer Review Report.

5.2.4. Other methods

A wide repertoire of methods is possible in order to be able to align the process to the aim and content of the review. Apart from the most common central elements of a Peer Visit described above, other methods, such as (short) questionnaires and surveys, collection and analysis of relevant documents, shadowing, photo/video/picture evaluations, role play, etc., may also be employed.

5.3. Analysing data

A preliminary analysis and assessment based on the Self-Report must be made by the Peers before the Visit. During the Visit, it is advisable to sort through and discuss the findings of the individual sessions and activities immediately afterwards. Peers should not jump to conclusions but carefully weigh the evidence found and seek to gather additional information if findings are inconclusive. A communicative validation of findings – especially with learners, as the ultimate beneficiaries, or with the VET+ provider representative/responsible management – can also help to challenge earlier judgements and to obtain a more comprehensive impression. In order to distil, analyse, and discuss the collected information, sufficient time must be reserved for repeated exchange in the Peer Tandems as well as for the final analysis of the findings in the whole Peer Team.

European Peer Review in Practice: reserve time for analysis

The experience of the Peers in the pilot phases of the Peer Review projects indicates that ample time for analysis is crucial: if the Peer Visit agenda focuses primarily on collecting large quantities of data, too little time is left for analysing and making sense of this data. Peers feel overwhelmed, stressed, and frustrated and experience difficulties when they have to come to a final assessment. Thus, a balance must be found between the requirement to glean comprehensive data from different stakeholders (cf. below, "Triangulation") and the need for a thorough analysis and discussion of the findings.

5.4. Assessment and feedback

The central element of a Peer Review is the assessment, i.e. the professional assessment by the Peers. It is necessary to reserve ample time for the challenging task of organising and distilling findings, judging their reliability and relevance, discussing different perspectives and opinions in the Peer Team and arriving at common conclusions.

A final meeting of the Peers should be held before the feedback session with the VET+ provider. In this meeting, the collected data are reviewed and matched for relevance and representativity. Important issues should be selected and noted so that they can be presented to the VET+ provider in the feedback session. During the discussion meetings of the Peers, the different perspectives of the individual Peer Team members should be considered. It is recommended that the Peers come to consensual conclusions; statements of differing opinions should only be given if no agreement can be reached. All assessments must be substantiated.

5.4.1. Oral feedback

A very useful element is the feedback session at the end of the Peer Review, in which the Peers communicate their findings (and perhaps also their recommendations) to the reviewed institution. This also allows for a communicative validation - direct comments from the institution, including the clarification of misunderstandings or irrelevant conclusions - and an exchange between the Peers and the reviewed institution.

Feedback can be fairly descriptive - merely describing the findings of the Peer Visit - or it can involve reporting an assessment, identifying strengths and areas for improvement. The latter will usually be the case in European Peer Reviews.⁴

Giving and receiving feedback is, of course, a delicate task. On the one hand, Peers must be fully aware of their responsibility to provide useful and critical feedback to the VET+ provider in a friendly and professional manner. When assessments are presented during the oral feedback session at the end of the Peer Visit, they must be prepared and formulated with great care so as not to offend the representatives of the VET+ provider and cause conflicts.

Representatives of the VET+ provider, on the other hand, should neither start defending themselves nor arguing their case against the findings, but accept the feedback as valuable information in their quest for development and growth. Coming to a full understanding of the feedback should, therefore, be the focus of this oral exchange.

Thus, both the Peers and the VET+ provider must collaborate in the constructive handling of feedback. It is helpful if the staff of the VET+ provider reviewed assumes a self-confident stance which also accepts criticism. The Peers need to refrain from any kind of sweeping statements or statements focusing on specific persons. An inoffensive form of language should be used by all involved, descriptions should be as clear as possible rather than abstract; Peers should concentrate on behaviour and not on assumed personal characteristics; positive aspects should be mentioned alongside the negative, and judgements and conclusions must be based on facts and observations.

5.4.2. Final assessment

The final assessment should only be made by the Peers after the feedback session (including the communicative validation) so that comments and feedback from the VET+ provider can be taken into account. The assessments and conclusions will be included in the Peer Review Report.

5.4.3. Recommendations

Recommendations are usually part of evaluation procedures. In a European Peer Review, the Peers will formulate areas for improvement in the Peer Review Report as an indication to the VET+ provider that action should be taken in these areas.

Recommendations beyond this indicative assessment should only be given by the Peers if the VET+ provider asks for them. If the VET+ provider does not seek recommendations from the Peers during

⁴ Descriptive feedback will be given if 1) the provider explicitly asks for this kind of feedback or 2) cultural attitudes towards feedback and/or the lack of or negative experience of the provider in the field of external evaluation suggest a cautious procedure.

the Peer Review this should be clarified before the Peer Review – when the assignment for the Peers is defined – or at least in due time before the feedback session.

If recommendations are desired, they can be presented and discussed during the Peer Visit in an open exchange between the Peers and the representatives of the VET+ provider. Such a discussion should then focus on mutual exchange and learning from good practice.

5.4.4. Peer consulting

As has been pointed out before, useful feedback is the central agent for quality improvement and mutual learning in the Peer Review process. Feedback can be a one-way communication but may also develop into a dialogue between the Peers and the reviewed institution. In a discussion of strengths and areas for improvement, the Peers may also suggest advice on certain topics. This must be done carefully, though: Peers should focus clearly on the situation at hand and not try to "proselytise" the reviewed VET+ provider to adopt solutions successful in their home institutions. Again, Peers should only assume the additional role of consultants if the VET+ provider expressly asks them to.

5.4.5. What happens if the Peers make important findings which were not called for?

Although the Peer Review should focus primarily on the Quality Areas chosen, it may happen that important findings by the Peers concern issues which are not covered by the (chosen) Quality Areas. In this case, the Peers and the VET+ provider should decide jointly on how to deal with these results. Although digressions from the agreed topics should be limited, essential feedback should not be suppressed automatically if it does not fit into the previously agreed scope. Additional findings can be presented merely orally (e.g. in the feedback session) or, if all parties agree, could also feature in the Peer Review Report as an addendum.

5.5. Meeting quality standards

5.5.1. Triangulation⁵

Using different methods and different sources of information in the collection of data contributes to the quality of the evaluation in terms of objectivity, reliability and validity. Soliciting diverse points of view from different stakeholders during the Peer Visit will enable the Peers to gain a more accurate and complete picture.

5.5.2. Communicative validation

Communicative validation is also used in qualitative social research to enhance the validity of results: feedback on findings is systematically solicited from different stakeholders to challenge the data collected as well as its interpretation. A communicative validation can be carried out whenever necessary in the Peer Review process, in most cases it will be used in the final stages of the Visit, e.g. shortly before, during or after the feedback session with the VET+ provider.

⁵ In social research, the approach of including different methods and sources is called triangulation.

5.5.3. Ground rules for Peers

Professional behaviour of the Peers is an essential quality requirement. They must assume a critical stance while remaining open and sympathetic.



“Tips for Peers on how to carry out an effective Peer Review” can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

5.5.4. Time management

Good time management is pivotal for the success of a Peer Review. A realistic Peer Review agenda is a must since activities usually tend to take more time than planned: if the agenda is too tight, any slight delay may cause grave problems in the process (interview time is reduced, observations do not start on time, time delays add up, activities have to be postponed at short notice, etc.). Agendas should, therefore, also include some time (such as extended breaks) to buffer delays.

During the Peer Visit, time-keeping is essential. It is the Peer Review Facilitator who is responsible for local organisation – availability of interviewees and classes during the data collection period, organisation of final meeting, provision of catering and transport (if necessary) throughout the Peer Visit.

Finally, a high level of time-keeping discipline is required from the Peers. The Peer Coordinator (who may be aided by the Evaluation Expert) assumes central responsibility for time management in the Peer Team. S/he must make sure that the timeframe of the agenda is respected, that the Peers are punctual, that discussion sessions in the Peer Team are not overextended, and that decisions are made, if problems arise, on how to best use the limited time available.

5.6. Duration of the Peer Visit

The duration of the Peer Visit depends on the size of the VET+ provider, the scope of the Quality Areas and the time available. It is advisable to plan fairly short Visits since:

1. Peer Visit will to some extent disrupt the routine processes at the VET+ provider,
2. Peers will not be able to take leave for an extended period of time.

According to the pilot processes carried out so far, Peer Visits of 2 days at the most seems to be the most adequate.

5.7. Elements of the Peer Visit



“Peer Visit Agenda: Guidelines & Model” can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

5.7.1. Optional: "Question and Answer Session"

If the Peers still need information or clarifications from the VET+ provider – concerning the Self-Report, the evaluation topics or other relevant issues, for example – some time should be reserved for a "Question and Answer Session" with the Peer Review Facilitator and/or other representatives of the VET+ provider.

Ideally, this session should take place before the Peer Review, either in the meeting between Peers and VET+ provider when the agenda is discussed or, alternatively, before or after the Meeting of the Peers on the eve of the Peer Visit (if it is held at or near the VET+ provider). If this is not possible, sometime should be reserved for questions and answers at the beginning of the Peer Visit, for example during the welcome session.

Digital and Green:

While advocating for the criticality of face-to-face interactions during the Peer Review process, the use of technology and digital means for efficiency purposes is highly recommended.

This is the case when it comes to obtaining clarification or further information regarding the Self-Report, the quality areas in revision or other relevant issues for the preparation of the Peer Visit. "Question and Answer Session" can be easily done by a videoconference (or several short ones) between Peers (or just the Peer Coordinator) and the Peer Review Facilitator and/or other representatives of the VET+ provider.

5.7.2. Welcome and first session with the VET+ provider

The Peer Review Facilitator welcomes the Peer Team and makes sure that organisational preparations have taken place. The Peers introduce themselves to the VET+ institution. The Peer Review Facilitator gives a summary of the purpose and target of the Peer Review process and the time schedule. The VET+ provider representative/top management as well as the head(s) of the reviewed area/VET+ provision may be present to welcome the Peers and a first interview with them may be conducted.

5.7.3. Interviews, observations, face-to-face visit and analysis in Peer Tandem

The interviewees (stakeholders, such as learners, former learners, education and training staff and other administrative staffs, representatives of stakeholders, etc.) are interviewed in groups of about 5 people for 45 minutes up to 1h15 minutes. Do not prepare more than 5 or 6 interview questions for each group. If more people are included in interview groups, either the number of interview questions must be reduced or not everybody will be able to answer all the questions due to time constraints.

To support the smooth running of the different activities during the Peer Visit, it is advisable to plan the organisation of the interviews and the other activities and draw up a chart showing who is to be interviewed/observed by whom, when and where. This organisation chart can also be included in the Peer Visit agenda.

If observations are being carried out, observation guidelines should be filled out, and analysed and summarised after the end of the observation session.

Sufficient time should be reserved for the analysis of the interviews/observations. For an hour of interviewing, at least half an hour will be needed for a first analysis. Breaks must also be taken into account in order to draw up a realistic agenda.

5.7.3.1. Meeting of the Peer Team to carry out a first internal analysis of the findings

During the internal analysis, the Peer Team aims to get an overview of the main results in order to prepare the final meeting with the VET+ provider. A structured discussion takes place, monitored by the Peer Coordinator or the Evaluation Expert. Concise and meaningful feedback to the VET+ provider is prepared. In a two-day Peer Visit, at least three hours should be reserved for this task.

5.7.4. Feedback session

As has already been pointed out, the final meeting at the end of the Peer Visit is a vital element of the Peer Review. Its main purpose is feedback to the VET+ provider and communicative validation of the findings.

All Peers should take part in the feedback session. They may all be active in communicating the feedback (taking turns talking) or one person may be selected to present the feedback – usually this is the Peer Coordinator. The Evaluation Expert may chair the final meeting.

On the VET+ provider's side, management and the Peer Review Facilitator, at least, should be present during the final meeting. Participation can be extended depending on the internal strategy of the VET+ provider. Presenting the evaluation results to a large number of staff of the reviewed VET+ provider can be helpful since it makes the whole process very transparent for all those involved and there can be immediate reaction. It probably also raises awareness of problems in an even more efficient way than a written report alone ("paper is patient"...). Furthermore, dissemination of results within the VET+ provider is ensured. Yet such a large meeting is expensive and may be an organisational challenge to the VET+ provider. Therefore, other routes for disseminating the findings within the organisation may be pursued.

The Peers present the distilled findings and assessments for every evaluation area (e.g. through visualisation in a PowerPoint presentation, on flip charts, etc.). VET+ provider staff and management are invited to comment. If Peer consulting is one of the main aims of the Peer Review, the meeting of the Peers and the VET+ provider should be extended to encompass further discussions.

5.7.5. Reflection on results and meta-evaluation of the process

After the communicative validation, the Peers meet to revise their findings and assessments. The Peer Visit ends with the Peer Team looking back on the Visit.

There are two different aims for this final session of the Peers:

1. Comments and questions of the final meeting have to be reflected upon and discussed again. Peer Teams revise their assessment of the Quality Areas in preparation for the final written of the Peer Review Report (phase 3).
2. To carry out a meta-evaluation of the revision process: members of the Peer Team reflect on their experiences, thus providing indications for further development of the Peer Review procedure.

If time is of essence, this meeting can take place online in a 2 to 3 days' time (maximum) after the Peer Visit.

Focus on Results:

According to the research carried out for the purpose of adapting the European Peer Review Manual, particular emphasis on the purpose of the meta-evaluation needs to be given, reinforcing that the purpose of this moment is to “evaluate the evaluation process”, therefore, reflecting on the process and on the experience (what went well?, what can be improved in the Peer Review procedure?).

The purpose is not to reflect on the assessment of the reviewed institution or on the assessment conducted during the Peer Visit (this would be the aim 1 of this final meeting), rather to evaluate the process, the experience, the methodology, with a view to contribute to further developments of the procedure.



A form for documentation of the “Meta-evaluation of the Peers” can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

6. EUROPEAN PEER REVIEW PROCEDURE – PEER REVIEW REPORT (PHASE 3)

The Peer Review Report is the final document. All Peers should contribute to the report. The writing, however, can be done by one or two persons with the other Peers commenting. It is recommended that the Peer Coordinator, together with the Evaluation Expert, be responsible for producing the Report. Usually, Peers should come to common conclusions and recommendations through discussion and argumentation; if this is not possible, dissenting opinions can also be presented.

Focus on Results:

The pilot phases of the Peer Review projects clearly showed that the writing of the report should be started during the Peer Visit: once the Peers are back in their usual working environment, finishing the report may be postponed for weeks and even months.

It is, therefore, highly recommended that the Peers arrive at common conclusions during the Peer Visit and that the main results of the Peer Review are already inserted into the “Peer Review Report” form, at the end of the Peer Visit.

The digital peer review platform will for sure help!

Should any (usually minor) adaptations be necessary after the communicative validation with the VET+ provider, they should also be inserted immediately so that – apart from some finishing touches – the draft Peer Review Report is ready at the end of the Peer Visit.

A draft report is issued, on which the reviewed VET+ provider should have the opportunity to give feedback. The final report should take these comments into consideration. In the European Peer Review, the final Peer Review Report is addressed primarily to the VET+ provider. All relevant internal stakeholder groups (teachers/trainers, students/trainees, other staff, etc.) should have access to the report.

Additionally, the VET+ provider may also pass on the Peer Review Report to relevant external stakeholders and/or education authorities. Often, parts of the report (usually the summary) are also made accessible to a wider public, e.g. over the internet.

6.1. Structure of Peer Review Report

For reasons of consistency and transparency, the Peer Review should have the same kind of structure and format as the Self-Report. It should indicate strengths and areas for improvement and possibly – if asked for by the VET+ provider being reviewed – recommendations.

The Peer Review Report contains:

- Title, table of contents (glossary and abbreviations, if necessary)
- Data sheet
- Short portrait of the VET+ provider
- Peer Review procedure
- Assessment of Quality Areas
- Overall assessment
- Annexes (e.g. agenda of the Peer Visit)

Digital and Green:

Within “Digital Peer Review for green and digital VET”, embracing the green and digital nature of the project, a digital peer review platform will be developed, where among others, there is a feature allowing to fill in all the documents/forms foreseen in the Peer Review procedure and where, taking full advantage of the interoperability of information, repetition will be avoided (e.g. information coming from the “Initial Information Sheet” and from the “Self-Report” will automatically be filled in the “Peer Review Report Form”), therefore, gaining time to focus on the distinctive aspects that characterise each document of the Toolbox and on the essential of the process and of the experience, clearing up the negative perception of time consuming and excessive bureaucratisation of the process reported by many VET+ providers and peers participating in previous experiences.



A form for the “Peer Review Report” can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

6. 2. Principles for writing the Peer Review Report

After the Peer Coordinator (with the assistance of the Evaluation Expert) has written the report, the Peers revise it.

The report should provide a description of the findings of the Peer Review and an assessment of these findings given by the critical friends (the Peers). Strengths and areas for improvement are pointed out and conclusions are presented. If the VET+ provider agrees, recommendations can also be part of the report.

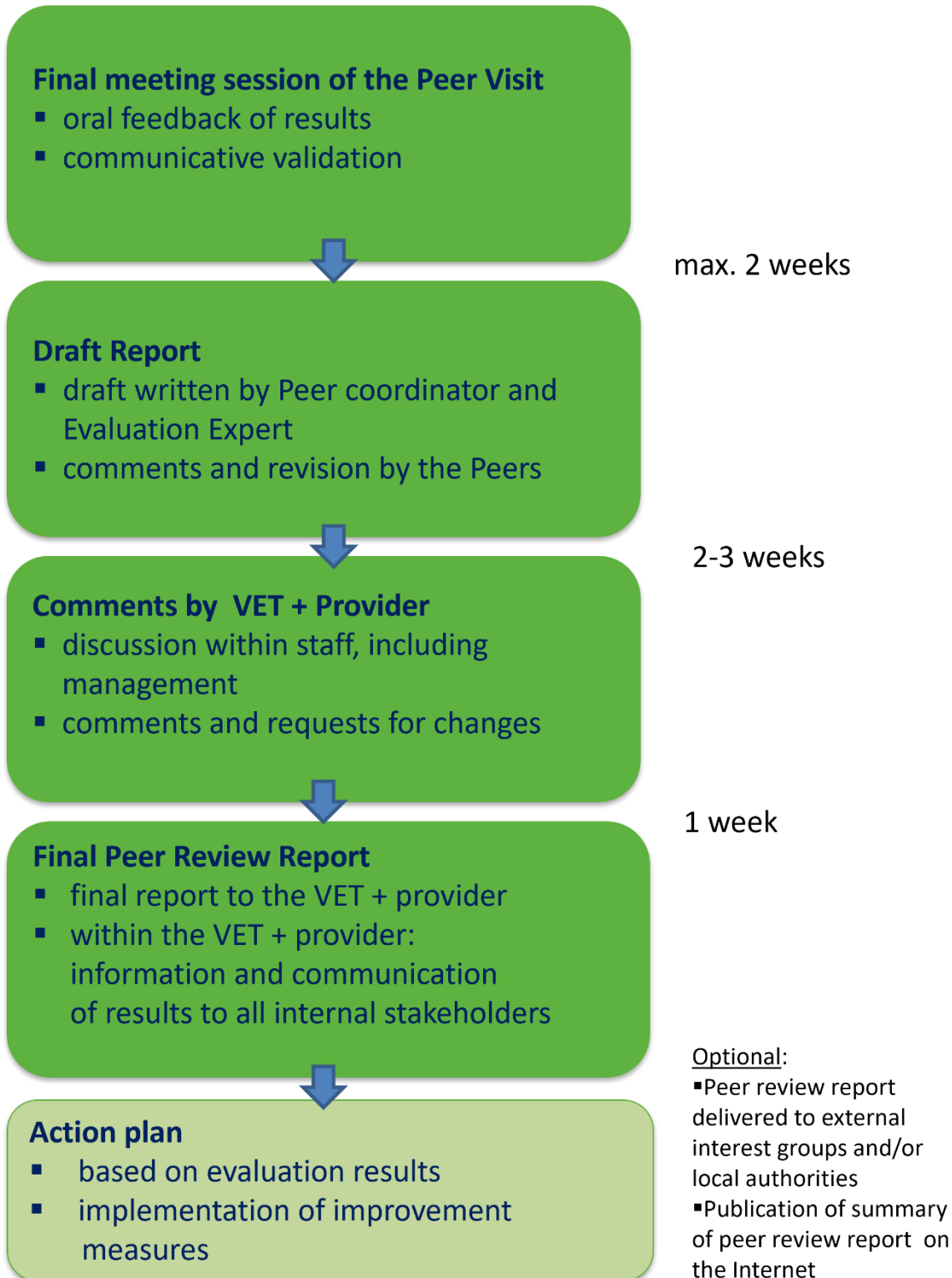
The report should only include results that have been presented to the VET+ provider (i.e. during the communicative validation). The report should not contain any surprises for the VET+ provider. In any circumstance the report will include comments on individuals. The peer review process is targeted to assess the quality of VET+ provision of a certain institution and not, in any circumstance, to evaluate individuals.

The draft report is read and validated by the VET+ institution, which may comment on it.



6.3. From the Peer Visit to the final Peer Review Report

Graph 6: Procedure and time schedule for the Peer Review Report



7. EUROPEAN PEER REVIEW PROCEDURE – PUTTING PLANS INTO ACTION (PHASE 4)

Evaluations should always have an effect on practical work: conclusions must be drawn and procedures for change must be implemented (cf. TWG for Quality in VET+ 2004, 9 f.) in order to justify the time and effort invested in the review process. Putting the results of the Peer Review into action is thus the critical element for the success of the Peer Review in terms of systematic, continuous and sustainable quality improvement. It lies within the responsibility of the management to ensure that the results of the Peer Review are used consistently (cf. also Chapter 4.1.1).

7.1. How to make sense of the results of the Peer Review

Making sense of evaluation results is usually one of the main challenges of systematic improvement at the VET+ provider level. In the European Peer Review, several elements of the procedure directly enhance the definition of suitable goals and measures.

Areas for improvement will be indicated during the feedback session and in the Peer Review Report in an open and understandable manner; the communicative validation of the findings and the possibility of a dialogue between the Peers and representatives of the VET+ provider further deepen comprehension and appreciation of the feedback. If deemed appropriate, recommendations for the follow-up procedure can also be furnished by the Peers.

Additionally, the Peer Review process itself supports the qualitative interpretation of the self-evaluation data as well as of data collected during the Peer Visit: the feedback of the Peers should provide the VET+ provider with easily understandable and meaningful information as to the future course of procedures for change.

7.2. How to prepare procedures for change

For putting results into action, a systematic process is proposed, based on the quality circle. It should be supported by a candid and comprehensive information policy ensuring that all relevant stakeholders have access to the results of the Peer Review. If possible, an open debate within the organisation should precede the implementation of procedures for change. All of this will improve the quality of the decisions made and enhance motivation and commitment within the VET+ provider.

7.3. How to proceed - a systematic approach to procedures for change

7.3.1. Revision of goals

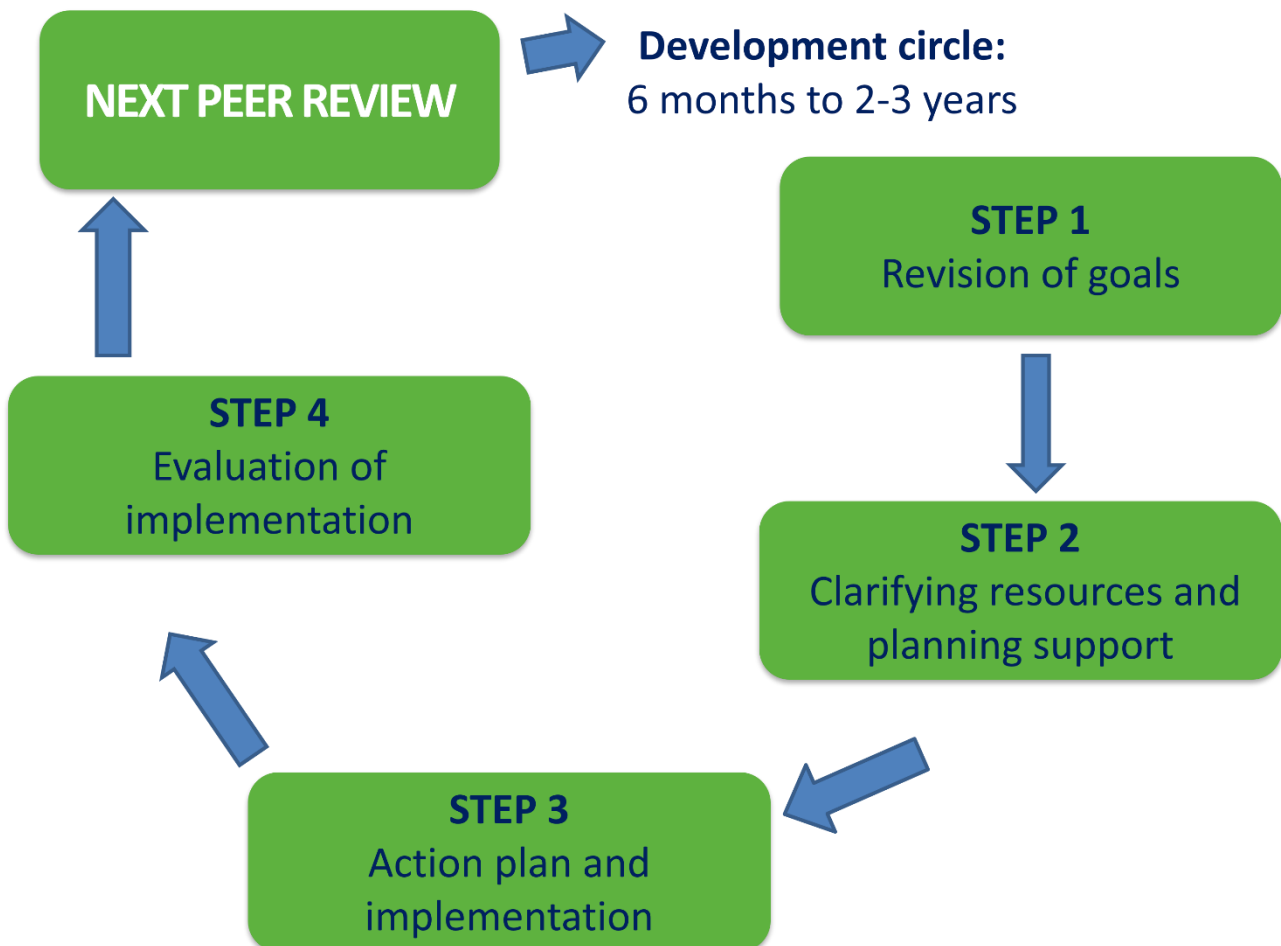
If possible, procedures for change should be planned cooperatively within the VET+ provider. This should start with the revision of quality objectives and planning based on the results of the self-evaluation and the Peer Review.



The revision should encompass the strategic and the operational levels, which should be interlinked. Attainment of operational targets should be possible within a realistic timeframe of 6 months to 2-3 years. It is recommended that they be defined as SMART targets:

- S** Specific
- M** Measurable
- A** Attractive
- R** Realistic
- T** Time-related

Graph 7: From knowing to action



7.3.2. Clarifying resources and planning support

For putting a plan into action, it is necessary to clarify the available resources and integrate the plan in the whole development process of the institution. Individual and institutional needs have to be considered when doing this:

- Which supporting forces exist and can be used? (e.g. networks, teachers/trainers)
- Which supporting structures can be activated? (e.g. quality groups, mutual class observations, mentoring, supervision, peer coaching, project groups, etc.)
- Which financial, personnel (internal and external) and time resources are available?
- To which hindrances and stumbling blocks must attention be paid?
- How can we manage challenging situations?
- How do we deal with resistance?
- Do we need consultancy? Why? What for? Who could do it?
- Do we need continuing training, new methods or new action models?
- Are training programmes for VET+ staff suitable and sufficient?

A realistic and motivating action plan and schedule are drawn up, based on the information on resources and support.

7.3.3. Improvement plan

The following guiding questions can be used when setting up an improvement plan:

- How do we start? What are the next steps? What are priorities?
- What do we have to do to reach the aim?
- Are midterm aims and milestones adequate?
- What resources (financial, personnel, time) are available?
- Who is involved or takes responsibility?
- Would it be convenient to appoint a steering group?
- Who has to approve the action plan?
- How can we communicate the action plan?

Development steps can be recorded in an improvement plan.

European Peer Review in Practice: proposal of a new tool

One of the findings of the research conducted to carry out the adaptation of the Peer Review Manual and following up the quality circle PDCA (plan-do-check-act) was that the methodology could benefit from the inclusion in the toolbox of a new tool, an “Improvement Plan” to cover the “ACT” phase of the quality circle.

The proposal is to adopt and adapt the one developed within the Erasmus + project “ONE – Networks for Quality Adults Learning” (2021/2024).



An “Improvement Plan” form can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

7.3.4. Planning the next Peer Review

All development plans at an individual and institutional level call for another feedback loop. The evaluation must include the assessment of the achievement of the targets defined.

Guiding questions to determine the success of the improvement measures may be:

- How do we know if we have made progress? How do we work out whether we have reached our aims? What criteria and indicators of success can be formulated? Which feedback methods do we apply?
- To whom are we held accountable? To whom do we have to report? Who reminds us to follow our aims and our plans if we neglect them?
- What positive consequences do we expect if we reach our aims? How do we reward ourselves if we reach our aims? What consequences are there if we do not reach our aims?

A self-evaluation of the implementation of procedures for change can again be complemented by external feedback through Peer Review – starting the next cycle of a continuous improvement process.



8. QUALITY AREAS

8. 1. Quality of VET+ provision and the definition of Quality Areas

What is the "quality of VET+ provision"? The term "quality" is a generic term. Quality is context-dependent, i.e. the concrete context has to be known in order to define quality. A useful specification given by the Technical Working Group (TWG) on Quality in VET (cf. Faurschou, 2003) is to relate quality to the fulfilment of goals connected with VET+ provision, i.e. to analyse reality against expectations:

$$\text{Quality} = \text{Experience (Reality)} / \text{Expectations (Goals)}$$

Thus, in order to determine what kind of provision is high quality and what is not, it must be clear what the context-specific goals of VET+ provision are. Goals can be found at different levels of the education and training system and vary to some extent from country to country and from VET+ provider to VET+ provider. Thus, there is no generally accepted definition or description of the key quality issues in VET+.

The success of a Peer Review, however, depends on whether meaningful and relevant Quality Areas are being reviewed or not. In addition, transparency and comparability between different Peer Reviews can only be ensured if a common framework serves as the point of departure.

Thus, a **framework of Quality Areas⁶ has been defined for the EU Digital & Green Manual for VET+** which:

- comprises the crucial areas of a high-quality VET+ provider in a clear, practical and workable form,
- modernise the set of criteria/indicators/evidences initially developed for VET to cover new trends, challenges and developments in the education and training systems, at European and national level,
- comprises update and recent developments in the learning and teaching process and in the organisational environment of VET+ institutions, transversally to all quality areas (e.g. digitalisation; sustainability and environmental-friendly approaches; RGPD and compliance; diversity, equity and inclusion; communication) but also specifically (e.g. development of two new Quality Areas, one on green education and training processes and another one in digitalisation to cover extensively the 2 core areas of the European strategy for a green and digital Europe,
- includes the concept of "quality cycle" in the development of the Quality Areas, therefore, including the 4 phases of a review process (planning, implementation, evaluation and review) in each Quality Area,

⁶ The source of innovation for the proposed framework of Quality Areas is the project "European Peer Review Quality Areas and Criteria for Vocational Education and Training", a joint project by the European Quality Assurance in VET National Reference Points (NRPs) of Croatia, Estonia, Finland and Slovenia from 2019–2021; the joint project by NRPs of Austria, Croatia, Finland and Slovenia from 2017–2019 as well as a "Green Deal" Quality Area developed in the framework of Lithuanian Peer Review methodology.



- covers most of the national Quality Areas of the partner countries, thus facilitating its use at a European level,
- serves as a tool for cross-reading different national quality frameworks, thus enhancing transparency and comparability within Europe.

8. 2. Relation between the European Quality Areas for VET+ providers and institutional/national frameworks

The set of Quality Areas proposed (including criteria and indicators, see below) should, therefore, by no means replace national frameworks. Instead, it is intended to support European cooperation in evaluation at VET+ provider level: a framework with common Quality Areas can be used for facilitating transnational Peer Review and/or can serve as a point of comparison for reviews carried out in a national context.

Special national/institutional quality elements can, of course, be added to this framework depending on national and/or institutional demands. For purely national use of the European Peer Review procedure, national frameworks can substitute the Quality Areas proposed below.

8. 3. European Quality Areas for VET+ institutions

The 16 Quality Areas proposed are:

- Quality Area 1: Strategic planning and development
- Quality Area 2: Quality assurance
- Quality Area 3: Knowledge management
- Quality Area 4: Management and leadership
- Quality Area 5: Management of infrastructure, facilities and finances
- Quality Area 6: Human resources management and internal relations
- Quality Area 7: Diversity, equity and inclusion
- Quality Area 8: External relations
- Quality Area 9: Internationalisation
- Quality Area 10: Pedagogical framework and planning of the pedagogical processes
- Quality Area 11: Teaching and learning
- Quality Area 12: Work-based learning (WBL) outside the VET+ provider
- Quality Area 13: Assessment and certification
- Quality Area 14: Learning results and outcomes
- Quality Area 15: Green education and training processes
- Quality Area 16: Digitalisation



European Peer Review in Practice:

The above proposed Quality Areas (QA) are the result of the developments made through several projects dealing with quality assurance and development in several domains, areas, subsectors of education and training provision, including initial VET, continuing VET, adult education/learning, vocational guidance, validation of formal and non-formal learning, etc as well as the result of the adaptations and innovation brought to them by the project “Digital Peer Review for green and digital VET”.

The QA proposed were, therefore, designed to be applicable to what we designate as “VET+ providers” in a broad sense without losing the focus on the specificity given by each subsector or specific linked activity.

8.3.1. Core and Optional Quality Areas

The 16 Quality Areas comprise four Quality Areas that relate directly to the “key business” of VET+ institutions: the learning and teaching processes. They are thus called “Core Quality Areas”. Since these four Quality Areas usually lie within the decision-making power at the institutional level, VET+ providers all over Europe will be competent to act on the results of external assessment in these areas.

For a European Peer Review, it is recommended that at least one of the four "Core" Quality Areas be tackled.

Thus, the 4 Core Quality Areas are:

- Quality Area 10: Pedagogical framework and planning of the pedagogical processes
- Quality Area 11: Teaching and learning
- Quality Area 13: Assessment and certification
- Quality Area 14: Learning results and outcomes

The remaining Quality Areas – Optional Quality Areas – are considered necessary for the operation of the VET+ institution, they support the processes of the Core Quality Areas.

8.4. How the Quality Areas are specified

8.4.1. Criteria

Each Quality Area is clarified by a set of criteria. These criteria identify the key aspects of quality in the relevant area. The criteria therefore represent the guiding principles for quality assurance and quality development efforts in the specific Quality Area.

In a European Peer Review, at least 2 criteria should be reviewed for each Quality Area selected. However, the list of criteria is not exhaustive, which means that further criteria can be added, depending on individual needs. All criteria to be reviewed must be dealt with in the self-evaluation and the Self-Report.

8.4.2. Examples of indicators

Additionally, the criteria are further specified by indicators which serve to exemplify the criteria. They are merely suggestions and are not prescribed for the European Peer Review procedure. This means that they can be exchanged or complemented by other indicators, if necessary.

Some of the indicators are based on "hard" quantitative data, which can be measured and counted statistically (e.g. drop-out rate). Some of them will be provided by the VET+ provider/institution in the Self- Report. The majority of indicators outline "soft" qualitative indications of the existence of certain conditions or trends. The "soft" indicators presented in this manual are formulated in a precise way and prescribe requirements for the fulfilment of the individual indicator.

8.4.3. Sources of evidence

This category is considered to be a support for both the VET+ institution and the Peers. The sources of evidence indicate examples and suggestions as to where and how the specific requirements for the indicators can be allocated and documented.



The whole list of the European Quality Areas for Digital & Green Peer Review, with criteria, indicators, and sources of evidence can be found in the Toolbox (available in [Digital Peer Review Platform](#)).

9. PEERS

9. 1. Who is a Peer?

A Peer is a person:

- who is an equal of or is on equal standing with the person(s) which work is being reviewed,
- who works in a similar environment (and/or in a similar institution),
- who is external (i.e. from a different institution) and independent (has no personal/institutional "stakes" in the evaluation process),

and

- who has specific professional expertise and knowledge in the field (shares values, professional competence and attitudes, language, etc.),
- who can thus bring a degree of “inside” knowledge of the object of review into the process and combine it with the external view of somebody coming from a different organisation (“external insider”).

Peers are sometimes also called “critical friends”, as their review is based in a friendly equal standing approach.

9. 2. Core task of the Peers

The core task of the Peers is to come to an understanding of the particular situation of the reviewed provider and to give critical feedback. Recommendations and solutions to problems should only be given if expressly asked for by the provider.

9.3. Composition of the Peer Team

European Peer Reviews should be carried out by teams of 4 Peers. It is recommended that the overall size of the Peer Team is an even number, because sets of two Peers (Peer Tandems) should be formed to conduct the interviews with the different stakeholder representatives. (If larger Peer Teams are employed, the number of Peers should not exceed 8).

The composition of the Peer Teams depends on the subject of the Peer Review since, first and foremost, Peers should have extensive expertise in the Quality Areas reviewed. High standards in the choice of the Peers are required as it is fundamental for the success of the Peer Review process. It is important to note, however, that the team as a whole must cover the expertise and experience required and not necessarily any single team member. In detail, a Peer Team for a European Peer Review should consist of experts with the following occupational backgrounds:

At least half of the Peers should be "real" Peers, i.e. colleagues from other VET+ providers: teachers/trainers, VET+ coordinators, counsellors, mentors, tutors, instructors, assessors, managers, quality experts, etc.

These VET+ professionals should have the following expertise:

- in the review topics under scrutiny,
- in teaching and learning processes (at least 3 years),
- in quality assurance and quality development procedures (i.e. quality management approaches, evaluation methods, etc.). It is also recommended that two of the Peers currently work in learning and teaching processes (e.g. as teachers/trainers; as counsellors, etc).

Additionally, a stakeholder representative (or representatives) can be included in the Peer Team. This Peer can come, for instance, from "external cooperation partners", such as institutions at other educational levels (e.g. universities, polytechnics), from the closely related business world (representatives of enterprises) or from other relevant stakeholders (labour market experts, social partners, parents (if applicable), etc.).

It is recommended that one member of the Peer Team be able to assume the role of an "Evaluation Expert" with expertise in evaluation, moderation and communication. This Peer may also come from an institutional background other than VET+ (e.g. evaluation, research, consulting, etc.). This person should, however, also have sufficient experience in VET+ since s/he will fulfil both the function of a "normal" Peer and the function of Evaluation Expert. The Evaluation Expert need not be recruited from outside VET+, a "real" Peer from another VET+ provider, who has the required qualification and expertise may also assume the role of the Evaluation Expert.

9. 4. Roles within a Peer Team

Within a Peer Team, the following roles should be filled:

- Peers
- A Peer Coordinator⁷
- An Evaluation Expert
- A transnational Peer (if applicable)

9.4.1. Peers

The Peers analyse the Self-Report, draw up an evaluation plan (who is to be interviewed/observed, protocols and guidelines for interviews/observations/other methods for collecting data) and carry out the Peer Review (e.g. collecting information, interviewing, observing, applying other methods for collecting data, analysing findings, giving feedback, etc.).

⁷ The Peer Coordinator can be appointed either by the reviewed provider itself or by the coordinating body organising the Peer Review (if applicable).

9.4.2. Peer Coordinator

In addition to the tasks of a Peer, the Peer Coordinator is the leader of the Peer Team. S/he is the primary contact for the VET+ provider, coordinates and plans the activities of the Peers and is concerned with the moderation of the review process and time management. S/he is also responsible for the writing of the Peer Review Report.

The Peer Coordinator thus assumes a central role. S/he needs a high level of competence in evaluation, team-leading, communication, moderation, and time management and must therefore be selected carefully.

European Peer Review in Practice:

One of the findings of the research conducted to carry out the adaptation of the Peer Review Manual is that the choice of the Peer Coordinator is key to the process. A Peer Coordinator already experienced as peer can greatly influence the fluidity of the process and the full effectiveness of the peer review process.

9.4.3. Evaluation Expert

The role of the Evaluation Expert should also be covered in the Peer Team to make sure that at least one person has comprehensive expertise in evaluation, moderation, and communication. This role can be assumed by the Peer Coordinator or one of the other Peers in the team.

If the Peer Team is not very experienced in evaluation, the Evaluation Expert will guide the Peer Team and support the Peer Coordinator in her/his tasks. In this event, the Evaluation Expert can be responsible for moderating the internal analysis meeting(s) of the Peer Team where the findings of the various Peer Tandems are discussed and the feedback to teachers/trainers, other staff and management is prepared. Furthermore, the Evaluation Expert may moderate the final meeting. S/he may also assist the Peer Coordinator in the writing of the Peer Review Report. If possible, the Evaluation Expert will also support the Peers with special evaluation expertise in the preparation phase by assisting them in the drawing-up of interview guidelines, for example.

9.4.4 Transnational Peer

Employing a transnational Peer is optional. For a transnational European Peer Review, though, recruiting a transnational Peer is a requirement.

On the one hand, inviting a Peer from another country can be a very enriching experience for all parties involved – the transnational Peer, the VET+ provider and the other Peers. Confronting one another with different systems and practices can enhance mutual learning and innovation transfer. Additionally, the independence and evident distance of a transnational Peer often stimulates a special atmosphere of openness and critical reflection.

On the other hand, including a transnational Peer requires careful preparations and certain conditions on the part of the VET+ provider and the Peers. First of all, all parties involved must be aware of the additional efforts necessary: the language question, in particular, needs to be considered carefully as must the diversity of education and training systems and cultural

differences. Inviting a transnational Peer usually also calls for extra funding, for travelling, for example, or for translation costs.

9.4.5. Diversity, equity and inclusion expertise

It is recommended that the Peer Team as a whole should be if not specifically skilled on diversity, equity and inclusion, at least aware of the importance of those topics and able to ensure that those aspects are duly considered throughout the process, i.e. from the planning of the review through data collection and assessment to feedback and reporting.

Table 2: Composition of Peer Team: roles, occupational background and competences

Number of Peers (in a four peers team)	Occupational Background	Required Competences
2 “Real Peers” (minimum) *	Professionals from other VET+ providers (teachers, trainers, managers, training coordinators, quality experts, other pedagogical staff such as mentors, tutors, instructors, assessors, counsellors, etc.)	<ul style="list-style-type: none"> • Knowledge of the Quality Areas (QA) under revision • Experience in teaching and learning processes • Experience in Quality Assurance (QA) and Quality Development (QD) procedures
1 “Stakeholder” Peer **	Representatives from other stakeholders’ groups (other educational levels, other education and training subsector or form of education and training, companies, social partners, etc.)	<ul style="list-style-type: none"> • Knowledge of the QA under revision • Experience in QA and QD procedures
1 “Evaluation Expert” *	Professional evaluator/quality assessor (e.g. research institute/university, independent auditing/accreditation body, EQAVET national reference point, from other VET+ provider)	<ul style="list-style-type: none"> • Expertise in evaluation, moderation and communication • Knowledge of the education and training system
1 Transnational Peer (optional) ***	Any of the above, usually a VET + professional	<ul style="list-style-type: none"> • Knowledge of the QA under revision • Experience in teaching and learning processes • Experience in QA and QD procedures
Expertise in diversity, equity and inclusion **	Any of the above	Additional: <ul style="list-style-type: none"> • Expertise in diversity, equity and inclusion
* Required for a European Peer Review ** Recommended for a European Peer Review *** Required for a transnational European Peer Review		

9. 5. Required competences and expertise of Peers

Peer Teams as a whole should thus have expertise:

- in teaching and learning,
- in quality assurance and development, and
- in the Quality Areas under scrutiny.

In addition, expertise in diversity, equity and inclusion in the Peer Team is recommended and one Peer should have the competences to fulfil the role of Evaluation Expert. As the Peer Review procedure presented in this manual is designed as a transnational instrument, it is recommended that at least one Peer from abroad is engaged. For the selection of a transnational expert, transnational experience, intercultural competences, and language skills are essential.

Thus, additional requirements are:

- expertise in diversity, equity and inclusion,
- expertise in evaluation,
- transnational experience.

9. 6. Applying to be a Peer

The manual also provides an application form for persons who are interested in becoming a Peer and have the relevant expertise. Peers who want to take part in a European Peer Review are required to fill out and submit this application form.



A "Peer Application Form" can be found in the Tool-box available in [Digital Peer Review Platform](#)).

9. 7. Preparation and training of Peers

Peers are obliged to analyse the VET+ institution's Self-Report and contribute to the preparation of the Peer Visit by attending meetings with the VET+ provider and the other Peers, by setting up an agenda for the Peer Visit and by formulating evaluation questions for the Peer Review.

Prior to the Peer Review, Peers should also undergo a "Peer Training Programme" that prepares them for their work as peers. The training programme should introduce Peer Review as an evaluation and quality assurance and development methodology, explain in depth the different phases of the Peer Review, and clarify the role and tasks of the Peers. Additionally, training in quantitative and qualitative data analysis and in qualitative evaluation methods (e.g. interviews and observation) may be provided, if needed. Training in soft skills, i.e. social, communication and moderation skills can also be provided, if needed. Soft skills need not to be deemed of less importance, as for instance putting at ease an interviewee can sometimes be the difference

between obtaining relevant insights and provide relevant feedback to the reviewed institution (or not) and gaining (or not) an ally for the method.

If face-to-face training is possible, the Peer training may also be used to support the Peers in the preparation of the Peer Visit, i.e. to provide guidance in the analysis of the Self-Reports and/or counselling in the preparation of the review design and the Peer Visit agenda (e.g. which methods to use for which topics, who to interview/observe, how to prepare questions for interview guidelines or grids with criteria for observations, etc.).

European Peer Review in practice: Peer training

Since the first Leonardo da Vinci project “Peer Review in initial VET” different solutions to Peer training were developed, ranging from web-based-training solutions to full face-to-face training to hybrid solutions, combined or not with sessions functional to the preparation of the Peer Visits.

However, the research conducted to adapt the Manual seems to indicate that a hybrid solution is the best solution and that at least a final face-to-face session should be arranged, so that peers can meet, discuss ideas, and share their perspectives on Peer Review processes, as well as anticipated difficulties and obstacles.

Another finding of the research is that, apart from initial training for (potential) Peers, normally delivered in the framework of specific funded projects where application of the methodology is foreseen, peers and reviewed institutions call for more differentiated Peer Training options that take into consideration different profiles of peers (experienced; non experienced or less experienced), therefore, offering Initial Peer Training but also Continuing and Further Training for those seeking to improve their skills and competences as Peers, through dedicated and regular training.

9. 8. Liaison with the Peer Review Facilitator

The primary contact person for the Peer Team during the whole process is the Peer Review Facilitator. S/he should make additional documentation accessible upon request and is responsible for the organisational preparation and conduct of the Peer Review (invitation of persons to be interviewed, reservation of rooms and other facilities needed, logistics during the review, etc.).

Thus, the facilitator’s core role is to ensure that the channels of communication between the VET+ provider/institution and the Peer Team (mainly in the person of the Peer Coordinator) work effectively. The facilitator is not a member of the Peer Team and will not make assessments about the topics under scrutiny. S/he should not be present during interviews, observations of other methods for collecting data or during internal discussions of the Peer Team.

10. LITERATURE AND (RE)SOURCES

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