



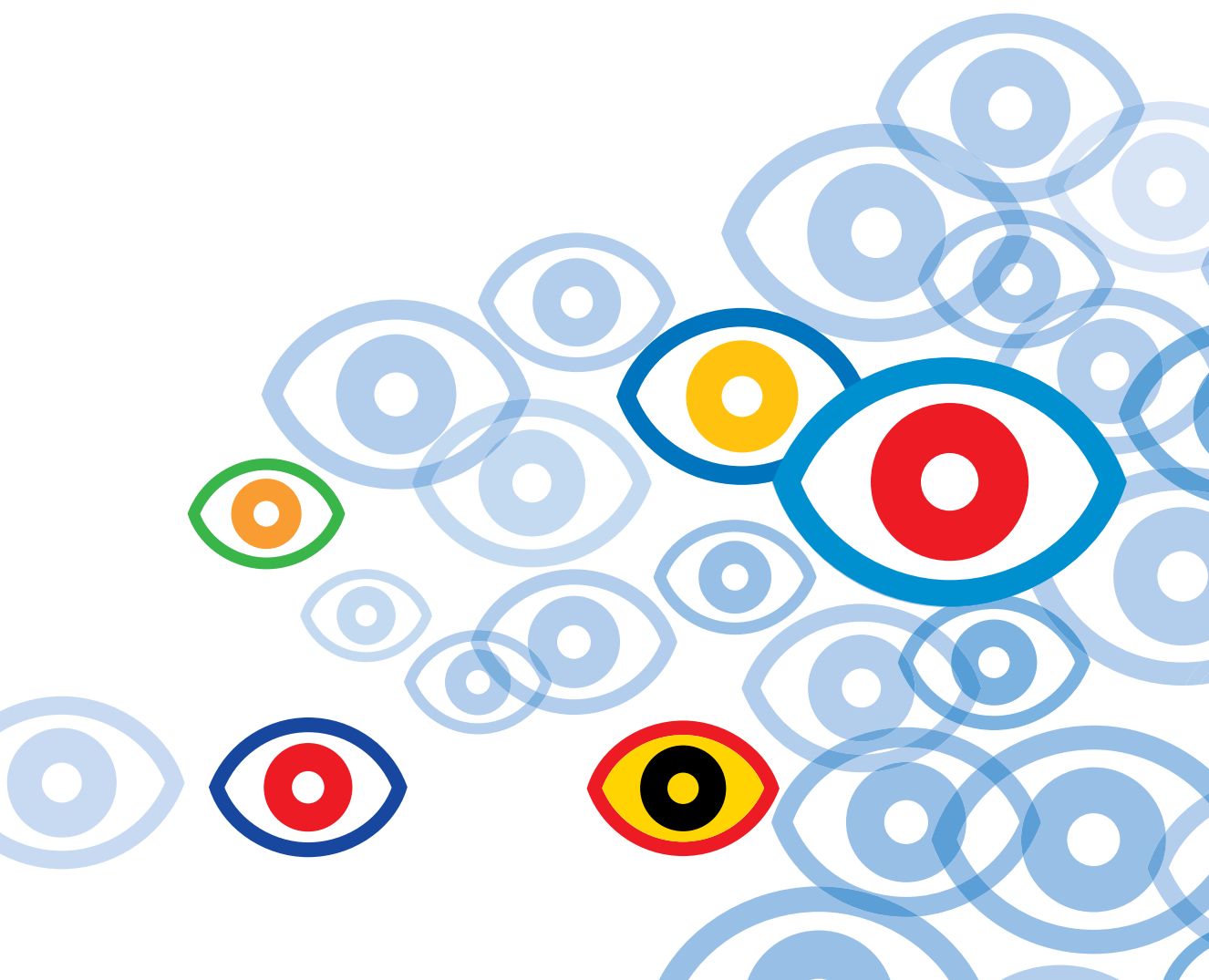
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European Centre for the Development
of Vocational Training



Education and Culture DG
Lifelong Learning Programme

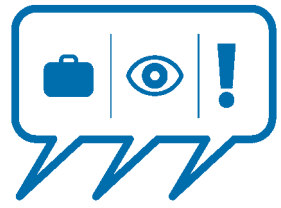
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HANDBOOK

FOR ORGANISERS OF STUDY VISITS FOR EDUCATION
AND VOCATIONAL TRAINING SPECIALISTS

STUDYVISITS







Handbook

for organisers of study visits
for education and
vocational training specialists

2nd edition



A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (<http://europa.eu>).

Cataloguing data can be found at the end of this publication.

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The **European Centre for the Development of Vocational Training** (Cedefop) is the European Union's reference centre for vocational education and training.

We provide information on and analyses of vocational education and training systems, policies, research and practice.

Cedefop was established in 1975 by Council Regulation (EEC) No 337/75.

Europe 123, 570 01 Thessaloniki (Pylea), GREECE
PO Box 22427, 551 02 Thessaloniki, GREECE
Tel. +30 2310490111, Fax +30 2310490020
E-mail: info@cedefop.europa.eu
www.cedefop.europa.eu

Cedefop – Study Visits
Tel. +30 2310490154, Fax +30 2310490044
E-mail: studyvisits@cedefop.europa.eu
<http://studyvisits.cedefop.europa.eu>

Christian F. Lettmayr, *Acting Director*
Tarja Riihimäki, *Chair of the Governing Board*

Foreword

It was a stimulating challenge for Cedefop at the request of the European Commission to embark on coordinating the study visits programme as part of the Lifelong learning programme 2007-13 (LLP) in 2008. It was an acknowledgement of Cedefop's success in managing the study visits for more than 20 years. Since then, the programme has made good progress and introduced new opportunities for development in bringing together VET, general, higher and adult education into a lifelong learning perspective.

Although the study visits form only one component of the LLP, its potential for impact on policy cooperation and learning is high. Through common learning and dissemination of good practices, each visit contributes to implementing the Europe 2020 strategy for a smart, sustainable and inclusive economy, the European cooperation framework in education and training 'ET 2020', and the Copenhagen process that has received a new impetus in Bruges in 2010. Study visits bring participants responsible for education and training policies together for an intensive week of exchange of knowledge, experience and expertise. It is an excellent opportunity to meet experts and specialists from other countries to learn about and discuss issues of common interest, establish contacts for future cooperation and take ideas back home.

Organisers of study visits play a key role. Previous experience shows that organisers have always done a very good job. In their group reports, each year participants describe almost unanimously the support they received from organisers as good, excellent or outstanding: 97% of participants are very satisfied with their experience during study visits. It is important that this trend continues in the new programme.

We strongly believe that organising a study visit is rewarding and beneficial for institutions and organisations as it is a rich learning experience, a chance to present their work and achievements to participants and local community, get new stimulus for development, raise European visibility, find partners for further cooperation, and boost staff motivation.

As a priority, Cedefop works hard on contributing to the quality of the programme, by supporting participants, organisers and national agencies. We hope this handbook will guide organisers through important steps of preparing, running and following-up their visits. We also hope it will help build a stimulating programme for exchanging opinions, networking and further cooperation between participants and, most importantly, hosts and participants.

Christian F. Lettmayr

Acting Director

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The handbook is also based on ideas, reflections and suggestions from participants' reports, annual meetings of national agencies and organisers and from assessments of study visits made in previous programmes.



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Introduction

Thank you for your interest in hosting a study visit and sharing your knowledge with European colleagues.

The study visits programme is unique in supporting learning about education and training policies in other countries and improving European cooperation in lifelong learning. Working together during the visit, reflecting together on various job-related issues, sharing points of view, discovering other ways of seeing things, solving problems or simply considering solutions make both organisers and participants feel more like members of a common European space. To exploit this great potential, it is important to organise a study visit so everyone benefits to the maximum and all does not stop on the last day of the visit. Contacts and networks established during a visit are used for projects in other actions of the lifelong learning programme.

This handbook is based on ideas, reflections and suggestions from participants' reports, annual meetings of national agencies and organisers and



from assessments of study visits made in previous programmes. We offer it to help organisers of study visits to build and implement interesting and effective programmes.

The handbook first briefly outlines the study visits programme for education and vocational training specialists, its objectives and role in the Lifelong learning programme 2007-13 ⁽¹⁾ (LLP). Then it gives an idea of what participants are and what is expected of them. But mostly it focuses on practical advice and examples of good practice on how to organise a successful visit.

⁽¹⁾ Decision 1720/2006/EC of the European Parliament and Council establishing the Lifelong Learning Programme 2007. OJ L 327, 24.11.2006, p. 45.




The study visits programme

A study visit lasts three to five days with a group of between 10 and 15 education and vocational training specialists and decision-makers coming together to examine a particular aspect of lifelong learning in another country. Depending on the approach, there are three types of study visit: those that explore themes from:

- a general education perspective,
- a vocational education and training perspective,
- a comprehensive lifelong learning perspective (the mixed type).

Study visits provide a forum for discussion and common learning and serve the following objectives:

- enabling those exercising important responsibilities at local, regional or national levels to improve their understanding of specific aspects of education and vocational training policies and themes of common interest in other countries;

 study visits forum



- continuing exchange of advice, experience, and ideas between all those participating in the programme, including both visitors and hosts;
- enriching the flow of information between participating countries and at European level.

Study visits is part of the lifelong learning programme of the European Union and as such it is related to the four sectoral programmes of the LLP, namely, Comenius, Leonardo da Vinci, Erasmus and Grundtvig. It covers themes of interest to representatives of various education and training fields and creates an opportunity for them to establish contacts for future cooperation. Each study visit and the entire programme contribute to achieving the objectives of the Europe 2020 strategy and ET 2020, as well as the Bologna and Copenhagen processes and their successors (see Annex 1).



Coordination of the programme at European and national levels

European Commission

The European Commission assisted by national agencies ensures effective and efficient implementation of all the actions of the lifelong learning programme.

Cedefop

Cedefop, the European Centre for the Development of Vocational Training, is a European agency that promotes vocational education and training (VET) in the European Union. Cedefop is the centre of expertise to support development of VET and evidence-based policy-making. It provides advice, research, analysis, information, and stimulates European cooperation and common learning. Cedefop works closely with the European Commission, governments, representatives of employers and trade unions, as well as researchers and practitioners.

<http://cedefop.europa.eu>

 <http://cedefop.europa.eu>



Cedefop coordinates the study visits programme at EU level. Cedefop coordinates calls for proposals, prepares and publishes annual catalogues; coordinates calls for applications, constitutes and monitors the composition of groups; supports the quality of the visits; conducts assessment and evaluation of implementation and results; and disseminates results of the programme.

National agencies

National agencies (NAs) are responsible for implementing the LLP at national level and ensure sound management of EU funds. As regards study visits, NAs promote the study visits programme to potential applicants and other target groups at national level; launch and conduct national calls for catalogue proposals; run calls for applications, announce grant award criteria and national priorities; organise evaluation and selection of applications, distribute grants to beneficiaries; monitor and support beneficiaries; disseminate and exploit results as well as provide information and support to organisers and monitor implementation of study visits in their countries.

 *hosting a visit*

Hosting a study visit brings added value to the institution or organisation by:

- providing a rich learning experience;
- improving its profile in the community;
- gaining access to or broadening networks;
- creating links with institutions and organisations with similar priorities and agendas and providing follow-up activities, such as creating cooperation projects under other LLP programmes (Comenius, Leonardo da Vinci, Grundtvig, partnerships);
- providing pupils/students/trainees with direct experience of the European dimension;
- getting new stimulus for development provided by the expertise and experience of visitors;
- increasing motivation and confidence of staff, etc.

Although those in charge of hosting a study visit usually take it as an additional task above their normal professional duties to accompany and look after a multinational group of visitors, they may benefit from:

- establishing contacts with local and other authorities, and politicians responsible for education and training;
- interacting and learning, sharing good practice with visitors;
- practising a foreign language.

Potential organisers submit proposals to host a study visit to the national agency of their country after clarifying the selection and submission procedures with the national agency. The national agency selects the best proposals and submits them to Cedefop who publishes an annual catalogue. Organisers receive final confirmation that visits will take place only after the participants have been approved by NAs and allocated into groups by Cedefop.

National authorities in Member States are expected to



support their national agencies with a budget to support hosts of study visits. Several participating countries have specific provisions for financial support for organising study visits. Organisers should first check these provisions with their national agency.

Responsibilities of organisers

Before a visit, organisers:

- define the aims and state general concept of the visit;
- discuss a draft proposal with their authorities and the national agency;
- submit a proposal for the annual catalogue ⁽²⁾;
- draw a preliminary draft programme of the visit and update it regularly;
- find and arrange accommodation;
- identify and contact institutions and organisations to be visited;
- identify and contact speakers;
- learn about the professional background, interests and motivation of group participants as well as special needs that might require special arrangements;
- inform all involved parties of the visit, including writing an article in the local press or placing information on the institution’s website;
- establish contact and keep participants informed of relevant issues;
- prepare background documentation on the theme in the host country;


 before a visit

⁽²⁾ The order of the described actions that precede submitting a proposal will differ from country to country. The important thing is to take care of all indicated issues.

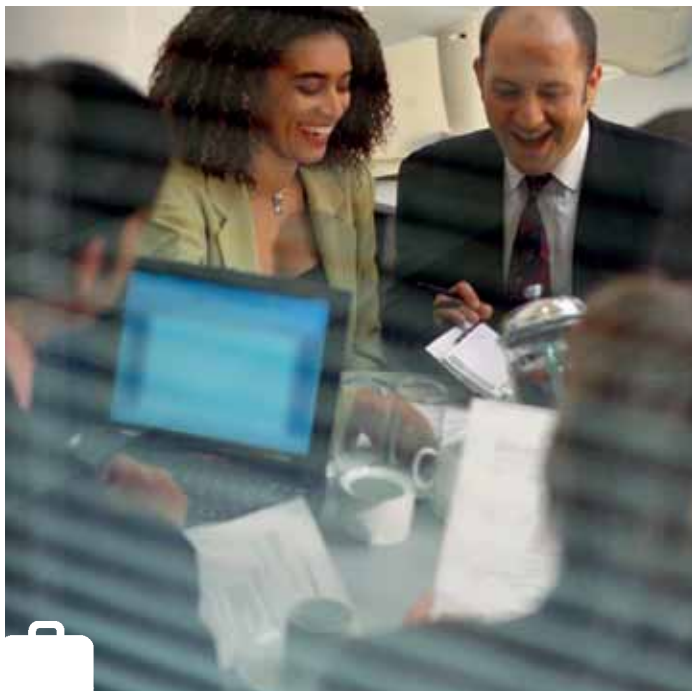
- if the contact person leaves and no back-up exists, organisers should immediately inform the NA and look for solutions.

During the visit, organisers:

- organise an informal meeting of the group on the evening before the official start day of the study visit;
- state clearly the objectives of the visit, explain the logic and structure of the programme to the group;
- tell the group about the group report and invite the group to select a reporter;
- accompany the group during the entire visit;
- provide opportunities for all partners to participate and share in discussions, make sure all participants are given room to contribute;
- issue attendance certificates to participants and, if applicable, hosting institutions and organisations;
- exercise flexibility and try to accommodate participants' interests and needs into the content of the study visit, adapt the programme throughout the visit to ensure quality.

 during the visit





After the visit, organisers:

- provide feedback to visited host institutions and organisations;
- try to keep contact with participants;
- invite participants to provide individual feedback on the visit;
- explore the possibility of a follow-up activity or project with participants' institutions;
- disseminate the results of the visit and experience gained about other countries as widely as possible (at institution, community, regional, national levels), including writing an article for the institution's webpage, local newspaper or professional media;
- promote the study visits programme to other education specialists in their institutions and networks.

👁 after the visit



Role and responsibilities of participants

Who can be a participant?

Participants usually exercise a certain responsibility for education and training policies at local, regional or national levels and should be able to act as multipliers of knowledge gained. For example:

- directors of education and vocational training institutions, centres or providers,
- directors and representatives of guidance centres,
- directors of validation or accreditation centres,
- educational and vocational training inspectors,
- head teachers, teacher trainers,
- pedagogical or guidance advisers,
- company human resource and training managers,
- owners/managers of small and medium-size enterprises (SMEs),
- representatives of employers' organisations,
- representatives of trade unions,
- representatives of chambers of commerce, industry, or crafts,

 participants are



- representatives of education and training networks and associations, including teachers with a leading role in such networks,
- representatives of local, regional and national authorities,
- researchers.

Participants are selected by national agencies of participating countries based on their eligibility, relevance and expected impact. After national agencies have selected participants and communicated the results, Cedefop draws up groups trying to assign participants to groups of their choice, ensuring that the groups consist of representatives of various geographical regions, professional backgrounds and genders. Participants receive a grant from the LLP that contributes to their travel and subsistence expenses.

Each group consists of 10 to 15 participants from different countries who represent different education and training systems. They also have different mother tongues and their level of skill in the group's working language often differs significantly.

Participants may have similar or completely divergent professional profiles. In the former case, this can lead to in-depth discussions on a well defined and specific topic. In the latter case, most general aspects of the topic can be discussed. Nevertheless, participants have a lot in common: they usually have considerable experience and are interested in the education and training systems of the host country and, more specifically, in the theme of the study visit.

In a few words, organisers should be prepared to welcome a group of people of mixed backgrounds that, in fact, will stimulate multiperspective and interesting discussions and common learning.

Responsibilities of participants

Applying for a study visit and receiving a grant, participants take certain responsibilities upon themselves. They:

 participants have responsibilities

- prepare for the visit by reading documentation provided by the organisers and Cedefop;
- prepare a contribution on the theme of the visit following instructions from the organiser, present and share the experience of their country in dealing with the theme;
- play an active part in all activities at the times scheduled in the programme throughout the visit;
- help prepare the group report;
- try to establish professional contacts that might be used for developing new projects and creating networks;
- disseminate the knowledge and information acquired during the visit in their country, including policy-makers at local, regional or national levels;



Preparing a visit

Finding and arranging hotel and transportation

Availability of hotel accommodation for the selected dates of the visit is a primary logistical consideration. As soon as Cedefop confirms that the groups have been formed, it is vital that the organiser reserves rooms provisionally for the planned number of participants.

The hotel for a study visit:

- should offer good value for money bearing in mind the amount of participants' grants. It should have an average 'mid-range' price;
- should have a lounge or room that can be used for informal meetings and to reflect, discuss, prepare and work together on the group report;
- should be well-located and easily accessible by public transport;
- should have suitable restaurants in the vicinity.

🎯 finding a hotel
for a study visit

Number of participants in a group

The organiser should be prepared for individual participants to withdraw. Sometimes, participants withdraw at very short notice or do not show up at all. Occasionally, one or two participants are added to the group, thus slightly increasing the original numbers. As a rule, the organiser will be notified of any additions in advance. In case the number of participants drops below the minimum number, the organiser can consider inviting participants from the host country (from the same town, municipality or from similar institutions) to take part in the visit. It should be mentioned though that these participants will not receive any grants.



Cancellation of a visit should only be considered as the last option.

Identifying and contacting speakers and host institutions

It is good to have a provisional programme at the time of submitting a proposal for the catalogue, including potential speakers and institutions and organisations that the group will attend during the visit. Once the groups are formed, it is time to contact identified speakers and institutions. The organiser can also consider arranging a reception by local authorities or an invitation to dinner or evening cultural programme by a regional administration.

The organiser should make agreements with potential speakers and hosts of site visits well in advance (optimal time will be 10 to 12 weeks before the visit) and receive confirmation in due time. It is useful to have a



list of alternative speakers and places to visit in case someone has to cancel at short notice.

If it proves difficult to obtain a particular speaker, several techniques can be employed:

- give precise and relevant information about the study visits programme and possibilities to participate in this and other European programmes;
- send a questionnaire to relevant institutions and organisations asking whether they would be interested and prepared to receive a group of education and vocational training specialists from European countries;
- contact national level decision-makers and ask them to recommend some experts and institutions related to the theme of the visit, which may be useful when contacting speakers and institutions;
- identify and approach organisations or potential contributors already familiar with European programmes through prior involvement in other actions and programmes. A study visit is an ideal opportunity to present local or regional projects in one of the Leonardo da Vinci, Comenius or Grundtvig programmes of the LLP. The national agency in the organiser’s country can provide details about projects supported by these programmes. The institutions which benefited from such projects in the past will most likely be listed on the national agency’s webpage.

If possible, as soon as speakers are confirmed, the organiser might allocate some time for briefing them so speakers cover different aspects of the main theme and avoid repetition. Time taken to “orchestrate” the content of speakers’ contributions and site visits will be rewarded during the visit.

④ *techniques to obtain
a particular speaker*

The organiser should inform speakers and hosts about the purpose of the study visit, the entire programme of the visit and the background and interests of participants in advance. It is also good to provide all speakers and hosts with a copy of the programme of the study visit. Ideally, they should know which issues are going to be covered by each session or institution.

The organiser should ask speakers and hosts of field visits to provide printed copies of their presentations (handouts, slides, charts), and if possible to hand out folders, brochures and other printed matter on the theme.



Visual aids should be in the working language of the group.

Speakers and hosts of field visits should be informed that the working language of the group will not be the mother tongue of most participants.

It is important to understand that a study visit is a tool for common learning. Therefore, the organiser should encourage host institutions to send more staff members to the meetings to benefit optimally from the visit and build contacts for potential future cooperation.



Drafting a programme

After identifying and contacting potential speakers and host organisations and exploring available accommodation and catering facilities, local transport and social and cultural resources in the town or district, the organiser should draft a provisional programme (see Annex 2 for the guidelines for a programme).



It is advisable to have a draft programme at least three months before the visit.

Based on previous experience and good practice, the following suggestions can be useful:

- ✓ The programme should be consistent with the announced theme and description provided in the catalogue. It is worth remembering that the description in the catalogue was the basis for participants to choose the study visit and determined their expectations.
- ✓ The programme should combine theoretical presentations of the theme, discussions and field visits. It should include various opinions and approaches, whether complementary or contradictory. All parts of the programme should complement one another to create a comprehensive and realistic picture of the theme in the host country by the end of the week.
 - A theoretical presentation of the host country on the theme should set the stage for the field visits and serve as a basis for further discussions. It is good to explain how the education and training system relates to the socioeconomic background and labour market needs of the region or country.

② good programme
hints

- It is advisable not to spend a lot of time on a general presentation of the education and training system of the host country. Links to reviews of national systems and glossaries are available from the Cedefop study visits website:

<http://studyvisits.cedefop.europa.eu>

- Theoretical presentations should be short and stimulating exchanges of opinions between participants and speakers.
- The number of field visits per day should be limited to allow some flexibility in the time schedule and not overcrowd the programme.
- The programme should be based both on examples of good practice and more representative and typical practices. Discussing challenges is a good opportunity for participants to share approaches from their countries, which might prove enriching for the host.

- ✓ 'Hearing all voices' is crucial for success. The theme of the visit should be presented from various perspectives – those of government and policy-makers at all levels, social partners, heads of institutions, teachers and trainers, students and users of education and training services.



Where study visits are related to vocational education and training, the organiser should contact employers' organisations and trade unions (social partners) and invite their representatives to participate in panel discussions and highlight the role of the social partners in VET policy-making.



- ✓ It is important to keep in mind that the purpose and objective of the programme are of primary concern. Study visits are group visits and are intended for common learning, so it is not always possible and not mandatory to meet particular individual learning wishes. However, identifying specific professional interests before the visit will help draw up a more relevant and interesting programme for the entire group. Whenever possible, organisers should try to cater for the specific interests of individual participants.
- ✓ It is essential to use the entire period of time for learning activities. Tourism and shopping should not be part of the programme. The host can suggest what sightseeing options are available, but is not responsible for arranging sightseeing and shopping.

Contacting participants

The earlier the organiser starts communicating with participants, the better the chances to build friendly and cooperative relations with the group.

Organisers should learn about the professional background and areas of interest of participants as well as their motivation to participate in the visit and take these into account when preparing the programme. They should also be aware of participants' levels of language skills. Using the European common framework for languages grid ⁽³⁾ has made it possible to get a better idea of participants' levels of language skills. The organiser might pay attention to the levels of spoken interaction important for active participation in discussions. In case of foreseen language problems, the

⁽³⁾ Common European framework of reference for languages. Available at: www.coe.int/T/DG4/Portfolio/?L=E&M=/main_pages/levels.html [cited 8.1.2009].

organiser should consider providing some language support and inform the NA.

Organisers should also pay attention to special needs as indicated in participants' applications. It is important that these needs (dietary requirements, impaired vision or hearing) are considered and provisions are made before the start of the visit.

! This information is available for organisers in the online management information system (see chapter on management information system – ‘Olive’).

The first e-mail should introduce the organiser's contact person and mention the theme, country and dates of the visit. It is good to send a draft programme at this stage, too, so participants can provide feedback. The organiser can ask participants if there are any specific areas of the topic they would like to explore. Seeking participants' feedback on the programme can potentially improve the quality of discussions during the visit and increase the possibilities for networking.

The organiser should also inform participants in advance of expectations from their contributions on the theme, the time allocated, the format, and the focus desired.

! Some organisers provide a template with main issues to focus on and ask participants to send their contributions in advance. Some organisers invite participants from the same country to contact one another before the visit and make a joint presentation on the theme.



Time planning is especially important if the visit lasts only three days. It is advisable that organisers obtain and circulate participants' presentations beforehand as allocating time for lengthy sessions of presentations can be a problem.

The organiser should inform participants of hotel arrangements and their responsibilities for booking confirmation and paying expenses. The deadline for confirming the booking should be indicated. To make confirming a reservation easier for participants, the organiser can prepare a reservation form and send a copy to each participant.

The organiser should inform participants that they are solely responsible for:

- confirming their bookings by the indicated deadline,
- paying for their accommodation and extras,
- paying cancellation fees in case they do not show up and fail to cancel the reservation.



It is good practice to check confirmations with the hotel some weeks before the study visit and if necessary to send out reminders to participants who have not yet sent their confirmation.



participants

responsible for hotel

Pre-visit communication with participants should also include:

- any background information on the theme of the visit;
- information on the time and place of the informal meeting on the eve of the study visit and the last session on the last day of the visit;
- information on how to get from/to the airport;
- information on currency, local time, climate, expected expenses, contact persons (in case of emergency).

The organiser should also regularly follow composition of the group in the online management information system (Olive) and send relevant information to new participants added to the group due to cancellations and replacements.

Apart from regular e-mail exchange, the organiser can create a discussion forum or a website as a means of preliminary contact and exchanges. However, the organiser should consider that maintaining this tool before and after the visit will require some time and effort, so capacity should be considered before starting this kind of activity.

pre-visit
communication
with participants



Preparing background information on the theme of the visit

Cedefop provides overviews of national systems of education and training, glossaries and background documentation on the theme of the visit from the European perspective on its website (check the Documentation Door).

The organiser is invited to prepare an information document on the topic of the visit. It is also important to include information on the socioeconomic context related to the theme of the visit to understand why some things happen/function in a certain way.

Participants are often interested in statistical information on the issues presented during the visit, especially learning outcomes, impact studies, and system performance. Organisers can add this information to the documentation.

The documentation should be exchanged between the organiser and participants prior to the visit and be made available in the management information system (Olive).





Promoting the visit

It is important to promote the study visit at local, regional or national levels and draw attention to its importance for the town/region.

The following strategies can be used:

- first and foremost, informing other colleagues in the institution or organisation about a visit of a group of education and training specialists and decision-makers from several European countries, its objectives and expectations;
- placing information about the visit on the institution’s website;
- providing information about the visit to local authorities, bringing their attention to the value added of this event;
- writing an article in the local press;
- inviting local press to some sessions, field visits or social events as it is also beneficial for the institutions visited and for promoting European cooperation.

A checklist provided in Annex 3 will assist organisers with preparations.

① strategies
to promote a visit




Suggestions for the practical running of a study visit

Informal meeting on the eve of the start

The eve of the official start of the study visit (usually a Sunday evening), the organiser holds an informal meeting of participants. This informal meeting is important to ‘break the ice’ and create a friendly, open and positive atmosphere for common learning, discussions and exchange of ideas. It is useful to have the informal meeting at the hotel so participants arriving later can join in.

At this meeting, organisers:

- introduce participants and hosts;
- explain the programme, its objectives and structure, the roles of presenters and speakers to understand how different presentations and field visits are related to the topic; make clear to participants what they will be seeing and also what they will not be seeing;
- clarify participants’ expectations;
- explain logistical aspects;
- present the requirements for a group report and select a reporter.

 informal meeting
at the hotel



This is also an appropriate moment to explain the customs and habits of the host country: eating, working hours, socialising habits, modes of transport, opening and closing hours of shops, museums, etc. A guided tour of the city can also be organised on the arrival day.

A typical day

On the first day, participants prefer getting an overview of the theme and some details on the socioeconomic conditions, labour market development of the host country/region/municipality. To establish lively interaction between theory and practice, it is stimulating to start field visits by visiting a school or an enterprise or training centre in the afternoon.

The daily pattern of the programme is generally a half-day devoted to theoretical sessions and a field visit or maximum of two field visits. Mostly, the morning is dedicated to contributions from institutions, political decision-makers, social partners, etc. and the afternoon is used for visits to schools, training

centres, enterprises, guidance centres, etc. This approach is seen as best practice. However, it can also be the other way around, as many institutions have their main activities in the morning. This mix between speakers, roundtables and field visits will make a well-balanced programme. Organisers should be flexible to design their programme in the most appropriate way.

Some organisers ask participants to present briefly the situation in their own countries on the theme of the visit (usually five to 15 minutes per participant). Experience shows that having all presentations in one session can make it long and tiring. Participants usually prefer spreading these presentations out over the first two or three days as information in the presentations can be useful for discussions. It should be borne in mind that the main objective of the whole exercise is to involve all participants in active exchange.



For instance, you can ask participants to circulate a two-page or a four- to five-slide presentation before the visit.





Often organisers and hosts of field visits are eager to show much more than the programme allows for, thus, making the timetable very tight. The organiser should nevertheless bear in mind that participants need time to process and recapture what they have seen and heard and discuss their findings within the group. It is not so crucial on the first day, but the need becomes stronger as the visit progresses. Often 10-15 minutes summing-up will provide for this important exercise. The organiser should not be afraid of “empty” periods of time, the more time for discussion and exchange the better. Putting an extra coffee break or a walk-and-talk session, giving time for informal talks in the breaks will serve the purpose as well.

Organisers should remember that the mass of knowledge, provided with long periods of concentration, in a language which is not always that of participants generates tension and fatigue. Consequently, participants should be released at reasonable hours and return to the hotel at a reasonable time.

On the last day, representatives of all hosts can be invited to a panel discussion or a wrap-up session. In some countries, it takes the form of a round table discussion on the morning of the last day. This session can also help participants clarify questions that have not been addressed during the visit.

Usually, the second half of the last day is dedicated to finalising the group report. The organiser should make a room and computer with Internet access available for the group and reporter. In most cases the organiser withdraws from the group while they are working, but stays close by to be available if any questions arise.

The organiser should issue certificates of attendance to participants. These certificates of attendance are compulsory evidence to be added to participants' individual reports to the NA. Certificates should be written in the working language of the study visit and could have a second page in the language of the host country.

In some countries, an informal farewell dinner on the last day or the evening before attended by all with all the speakers invited is possibly the highest point of the week and may lead to lasting contacts.





Group report

At the first meeting with participants, the organiser reminds them of their responsibility to prepare a group report and invites the group to select a reporter.

The report should:

- help participants, through discussion and exchange of impressions, summarise their learning experience;
- provide Cedefop and NAs with information to evaluate the quality and effectiveness of the programme and its outcomes;
- give the organiser an idea of how well the visit went and food for reflection for future visits that they might wish to host;
- provide information that can be further used by other education and vocational training specialists at national and European levels.

The group report is an instrument of reflection on the issues discussed, not of criticism of the visit. If the organisers wish, they may use a separate evaluation form to receive participants' assessment regarding

① group report
is an instrument
of reflection

ANNEX 1

Policy context of lifelong learning

In 2010, the Council of the European Union reviewed the progress towards the objectives of the Lisbon strategy (2000) of making the European Union the ‘most competitive and dynamic knowledge-based economy in the world’. Building on the lessons learned, the **Europe 2020 strategy** (see Box 1) set out a vision for Europe to become a smart, sustainable and inclusive economy with high levels of employment, productivity and social cohesion. The strategy recognises the strengths of the Lisbon process, in terms of aiming for growth and job creation, and its weaknesses in implementation and the differences among countries in the scale of reform. Looking to the future, the strategy places immediate focus on recovering from the economic crisis that has accelerated the need for reform and stronger cooperation.

The goals of smart, sustainable and inclusive growth can be achieved through raising skills levels and reinforcing education and, more specifically, lifelong learning. All Europeans should have the opportunity to acquire, upgrade and broaden their knowledge, skills and competences throughout their lives; to perform well in jobs that are likely to become more demanding at all levels. To ensure ‘smart growth’ driven by knowledge and

innovation, it is important to improve the quality of education and training, ensure access to them for all citizens, strengthen research and business performance, and promote innovation transfer throughout the European Union.

Adopted by the Council of the European Union in 2009, an updated **framework of European cooperation in education and training, ET 2020** (see Box 2) reflects priorities defined in the Europe 2020 strategy. The framework builds on the achievements of the Education and training 2010 work programme that brought about a tangible shift in most countries from input-oriented learning processes to learning outcomes. It addresses the remaining challenges in creating a knowledge-based Europe and making lifelong learning a reality for all. The framework focuses on lifelong learning and mobility; quality and efficiency of education and training; equity and social cohesion; and creativity and innovation. National education and training systems should better provide the means for all citizens to realise their potential as well as contribute to ensuring sustainable economic growth and employability.

High quality vocational education and training (VET) is one of the prerequisites to empowering people and promoting labour market participation. The cooperation in VET known as the **Copenhagen process** (see Box 3) will also continue with making VET a more attractive learning option as a main priority. During 2002-10, the Copenhagen process has supported the Member States in modernising their VET systems: it has promoted the lifelong learning perspective and the development of common tools, such as the European qualifications framework and the European credit system for VET. From now on, the cooperation will focus on putting the common European instruments and principles into practice and using them to support mobility for VET learners, encourage more adults to take up continuing training and to recognise the skills and competences people acquire at work or in their lives.

Cooperation among the Member States in education and training includes higher education and the initiatives under the **Bologna process** (see Box 4) that is aimed at making European higher education systems more comparable and compatible. It has led to a common qualifications framework for higher education and the key challenge now is to develop further the learning outcomes linked to the qualifications and study programmes. The process will also focus on increasing opportunities for and quality of mobility of students and staff, providing equal access to quality education and lifelong learning, closer linking education, research and innovation.

The policy-related work covered by the cooperation of the Member States in lifelong learning is complemented by the **Lifelong learning programme** (2007-13) (see Box 5) supporting cooperation in all education and training sectors at grass root level. It provides financial support to individuals and institutions to participate in thousands of cooperation projects each year. These projects also enable learners, teachers and trainers and educational leaders to spend some time in an institution or an enterprise abroad.

The updated priorities and cooperation framework for further developing and improving education and training in Member States emphasise the need for countries to work together. While each Member State is responsible for the organisation and content of its education and training systems, there are advantages in sharing good practice and learning together on common issues. Dissemination of the outcomes of cooperation among stakeholders will play an important role in its impact at national and European levels. The study visits programme brings together a wide spectrum of education and training specialists and policy-makers to discuss, learn from one another and share experiences in implementing lifelong learning policies in their countries, thus contributing to European cooperation.

BOX 1**Europe 2020 strategy**

Adopted by the European Council in June 2010, Europe's strategy for 2020 aims at smart, sustainable and inclusive growth. Asserting that the route to lasting economic recovery and social cohesion is knowledge and innovation, it argues for giving priority to investment in education and training.

The strategy includes ten guidelines that will remain largely stable until 2014, allowing the Member States to focus on implementation. Four guidelines are of specific importance to education and training: promoting lifelong learning, developing a skilled workforce responding to labour market needs, promoting social inclusion, and optimising support to research and development and innovation. Improving the performance of education and training systems at all levels and increasing participation in tertiary education are of key importance. According to the guidelines, school curricula should strive to support creativity, innovation and entrepreneurship.

Among its seven flagship initiatives, two are most closely associated with education and training. 'Youth on the move' is aimed at supporting the entry of young people into the labour market, while 'An agenda for new skills and jobs' was launched to bridge employment and education and training policies through a reinforced lifelong component and a new approach to adult learning.

The European Commission and the Member States will work in partnership on the agreed goals: Member States will develop their national strategies and will report annually on progress. National strategies should be implemented in a partnership of national, regional and local authorities as well as social partners and civil society.

Five targets have been agreed to measure progress: three of these are linked to education and training:

- less than 10% early school leavers;
- at least 40% of 30 to 34-year-olds completing tertiary education;
- 75% of the 20-64-year-olds employed through greater participation of youth, older workers and low skilled workers and better integration of legal migrants.

More information
can be found at:
[http://ec.europa.eu/eu2020/
index_en.htm](http://ec.europa.eu/eu2020/index_en.htm)
[cited 15.02.2011].

BOX 2

Strategic framework for European cooperation in education and training (ET 2020)

Agreed by the Council of the European Union in 2009, ET 2020 is a framework of cooperation between the Member States and the European Commission in education and training till 2020.

The primary goal is to support the further development of education and training systems in the Member States. This aims to ensure personal, social and professional fulfilment of all citizens, contribute to sustainable economic prosperity and employability and promote democratic values, social cohesion, active citizenship and intercultural dialogue.

Lifelong learning is a fundamental principle of the cooperation framework. It covers learning in all contexts (formal, non-formal and informal), at all levels of education and training (from early childhood education and schools through to higher education, vocational training and adult training) and at all ages (from pre-primary to post-retirement). Partnerships between education and training institutions and enterprises and wider communities are also important.

The cooperation addresses four strategic objectives:

- making lifelong learning and mobility a reality;
- improving the quality and efficiency of education and training;
- promoting equity, social cohesion and active citizenship;
- supporting creativity and innovation, including entrepreneurship, at all levels of education and training.

The objectives are accompanied by European benchmarks and reference levels of European average performance, so that by 2020 (see also Box 1):

- at least 95% of children between the age of four and the age for starting compulsory primary education participate in early childhood education;
- less than 15% of 15-year-olds have insufficient abilities in reading, mathematics and science;
- at least 15% of adults participate in lifelong learning.

The work continues on developing European benchmarks for mobility, employability and language learning.

To monitor progress, the Member States will produce national reports at the end of each three-year cycle.

More information can be found at:
http://ec.europa.eu/education/lifelong-learning-policy/doc28_en.htm
[cited 15.02.2011].

BOX 3**Copenhagen process**

The Copenhagen process refers to the cooperation of the Member States, the European Commission and the social partners in vocational education and training (VET). It contributes to achieving the objectives set in the strategic framework of cooperation ET 2020, of which it is an integral part. Started in 2002, this cooperation played an important role in raising awareness of the importance of VET both at European and national level and brought about significant developments in national policies and modernisation of VET systems.

The cooperation also led to the creation of important European instruments for transparency, the recognition of qualifications and competences, and quality assurance: Europass, the European qualifications framework (EQF), the European credit system for VET (ECVET) and the European quality assurance reference framework for VET (EQAVET). Implementation – which is at different stages in different countries – will be the focus of the Copenhagen process in the coming years.

To review the strategic approach and priorities of the Copenhagen process for 2011-20, the Bruges Communiqué was adopted in December 2010 by the European Ministers for vocational education and training, the European social partners and the European Commission. They agreed that, by 2020, VET systems in Europe should be more attractive, relevant, career-oriented, innovative, accessible and flexible and should contribute to excellence and equity in lifelong learning. Based on the four strategic objectives of the ET 2020, the priorities for VET will be:

- making initial VET an attractive learning option with high relevance to labour market needs and pathways to higher education;
- enabling flexible and open access to training and qualifications, including flexible systems for recognition of learning outcomes at all stages of life and cross-border mobility;
- promoting more opportunities for disadvantaged groups and inclusive VET for inclusive growth;

More information
can be found at:
[http://ec.europa.eu/
education/lifelong-learning-
policy/doc60_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc60_en.htm)
[cited 15.02.2011].

- nurturing creative, innovative and entrepreneurial thinking for all VET students within international cooperation.

Social partners at European level should develop their own initiatives to contribute to the attractiveness of VET. They should continue to play an active role in the governance of the Copenhagen process and contribute to the realisation of its priorities.

BOX 4

Bologna process

Started in 1999, the Bologna process contributes to European cooperation in education and training and includes countries outside Europe.

The aim of the Bologna process is to create a European higher education area in which students can choose from a wide range of high quality courses throughout the European Union. The Bologna process has three main priorities:

- introduction of three cycle system in higher education – bachelor/master/doctorate – fully in place in almost all countries in most institutions and programmes;
- quality assurance – in most countries there is an independent body for quality assurance,
- recognition of qualifications and periods of studies – the European credit transfer and accumulation system, ECTS, is obligatory in most countries.

The European Union supports modernisation of universities in curricula, governance and funding so they are able to meet the challenges of globalisation and competition and stimulate innovation and research.

More information
can be found at:
[http://ec.europa.eu/
education/policies/educ/
bologna/bologna_en.html](http://ec.europa.eu/education/policies/educ/bologna/bologna_en.html)
[cited 15.2.2011].

BOX 5

Lifelong learning programme (2007-13)

The lifelong learning programme is a funding programme to complement policy related work; it provides support to individuals and institutions to participate in thousands of cooperation projects each year. The programme covers a broad range of activities related to learning from early childhood to old age that support exchange and mobility across the EU and other participating countries. It gathered under one framework almost all education and training programmes. It consists of four sectoral programmes:

- **Comenius** (school education),
- **Leonardo da Vinci** (vocational education and training),
- **Erasmus** (higher education),
- **Grundtvig** (adult education).

It also includes a *transversal programme* of which study visits is part, supporting policy cooperation and policy learning alongside parts devoted to language learning, ICT and valorisation activities. The Jean Monnet programme supports European institutions and associations.

More information
can be found at:
[http://ec.europa.eu/
education/
lifelong-learning-
programme/
doc78_en.htm](http://ec.europa.eu/education/lifelong-learning-programme/doc78_en.htm)
[cited 28.1.2009]

ANNEX 2

Sample programme

A programme should include:

1. Group No;
2. Theme, title;
3. Dates;
4. Working language;
5. Local organiser's details: address, telephone, fax, e-mail,
6. Group leader's (the person who will accompany the group) name, address, telephone, fax, mobile phone;
7. Hotel details: address, telephone/fax, e-mail, room price;
8. Practical information:
 - (a) how to reach the hotel (means of transport: plane, train, car),
 - (b) cost of transport,
 - (c) address and telephone number of places to be visited;
9. Content and time schedule:
 - (a) welcome evening: place, date, time,
 - (b) sessions and visits:
 - places to be visited (name and address of organisation, no acronyms, short description of its functions as well as role in the visit's programme, web address);
 - meeting place, time;
 - group leader for the visit, if different from the one indicated before;
 - speakers (names, position, contact details subject/main issues of the contribution, web address of the institution they represent);
 - times of sessions/visits, time for question/answer sessions, breaks;
 - lunch: time (offered or not, cost as appropriate);
 - time of return to hotel, times for final discussion and reflection.
10. List of participants with their background details can be attached as a separate document.

ANNEX 3

Study visit organiser's checklist

Action taken	Time planning
<input type="checkbox"/> confirmation received from Cedefop that the groups have been formed	July and January
<input type="checkbox"/> username and password for Olive received from Cedefop	July - August January
<input type="checkbox"/> management and colleagues informed about the study visit to take place	
<input type="checkbox"/> organiser's team created	
<input type="checkbox"/> hotel for participants identified and preliminary agreement made	12 weeks before the visit (*)
<input type="checkbox"/> transport needs defined and arrangements made	12 weeks before the visit
<input type="checkbox"/> institutions and organisations to be visited are identified and contacted	12 weeks before the visit
<input type="checkbox"/> potential speakers are identified and contacted	12 weeks before the visit
<input type="checkbox"/> a list of alternative speakers and institutions drafted	12 weeks before the visit
<input type="checkbox"/> materials about the study visit sent to speakers and institutions (draft programme, description, list of participants with their professional backgrounds)	12 weeks before the visit
<input type="checkbox"/> preliminary programme prepared	12 weeks before the visit
<input type="checkbox"/> professional backgrounds, interests and motivation of participants studied	As early as possible
<input type="checkbox"/> special needs of individual participants identified, if any	As early as possible
<input type="checkbox"/> arrangements for participants with special needs made	As early as possible

Action taken	Time planning
<input type="checkbox"/> participants contacted and sent an information package (see page 37)	10-12 weeks before the visit
<input type="checkbox"/> background documentation on the theme in host country prepared and sent to participants (made available in Olive)	6 weeks before the visit
<input type="checkbox"/> participation of speakers and host institutions confirmed	6 weeks before the visit
<input type="checkbox"/> an informal meeting for the group on the eve of the starting day arranged	6 weeks before the visit
<input type="checkbox"/> a draft programme sent to NA	6 weeks before the visit
<input type="checkbox"/> reservations of the hotel confirmed by participants	4 weeks before the visit
<input type="checkbox"/> final programme sent to participants and NA	1 week before the visit
<input type="checkbox"/> objectives of the visit and structure of the programme explained	Informal meeting
<input type="checkbox"/> participants informed of the group report and invited to select a group reporter	Informal meeting
<input type="checkbox"/> attendance certificates issued to participants	Last day of visit
<input type="checkbox"/> visited host institutions and organisations thanked	After visit
<input type="checkbox"/> results of the visit disseminated	After visit
<input type="checkbox"/> Olive checked for any changes	Regularly
<input type="checkbox"/> information sent to newly added participants	Regularly

(*) These times can be somewhat shorter for visits starting in September and March. However, organisers are encouraged to do as much as possible well in advance.



CEDEFOP

European Centre for the Development
of Vocational Training

Handbook

for organisers of study visits
for education and
vocational training specialists

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Education and Culture DG

Lifelong Learning Programme

EN



The study visits programme for education and vocational training specialists, part of the lifelong learning programme (2007-13), is an initiative of the European Directorate-General for Education and Culture. Cedefop coordinates the programme at the European level, whereas the national agencies implement the programme in the Member States.

The **Handbook for organisers of study visits for education and vocational training specialists** should support organisers in preparing and running a successful study visit. The handbook briefly outlines the study visits programme, its objectives and place in the lifelong learning programme, the roles and responsibilities of the European Commission, Cedefop, national agencies, organisers and participants. The main focus is providing practical advice and examples of good practice to make study visits achieve their goal of contributing to policy learning and policy cooperation in lifelong learning. An annex helps organisers align their visits with European cooperation on education and training by providing concise summaries of the EU 2020 strategy, strategic framework for European cooperation in education and training 2020 ('ET 2020'), the Copenhagen and Bologna processes and the Lifelong learning programme 2007-13.

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CEDEFOP

European Centre for the Development
of Vocational Training

Europe 123, 570 01 Thessaloniki (Pylea), GREECE
PO Box 22427, 551 02 Thessaloniki, GREECE
Tel. +30 2310490111, Fax +30 2310490020, E-mail: info@cedefop.europa.eu

visit our portal www.cedefop.europa.eu



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