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TRANSVAL-EU

GUIDANCE AND VALIDATION SCENARIO FOR TRANSVERSAL COMPETENCES

Who are the users and what are the steps to take?

TRANSVAL-EU policy recommendation
Warsaw, July 2023

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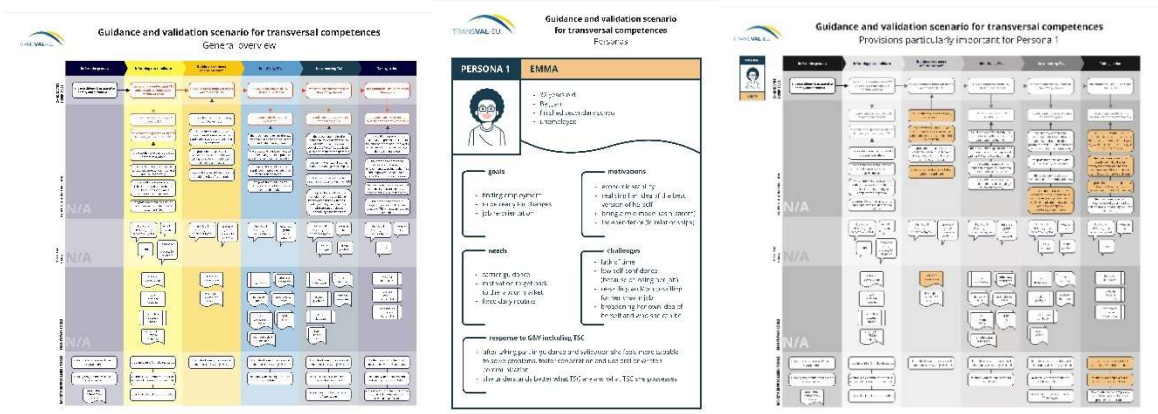
SUMMARY

The scenario presented to the reader is a policy recommendation illustrating how to introduce transversal competences into guidance and validation while taking into account different learning pathways of the candidates participating in these processes.

The scenario was designed as part of the 'Validation of transversal skills across Europe' (TRANSVAL-EU) project aimed at promoting transversal competences and related capacity building among guidance and validation practitioners. The core of the project activities consisted of preparing resources for practitioners, as well as training them and then conducting field trials in 5 European countries (Austria, Belgium, Italy, Lithuania, Poland), which tested the use of transversal competences in guidance and validation. The recommendation was based on quantitative and qualitative research conducted in the course of the project, as well as a thematic Design Thinking workshop conducted with practitioners from all the field trial countries.

The scenario is presented in the form of a diagram, whose structure is based on the Customer Journey Map and Service Blueprint techniques. The learning pathways of the candidates have been expressed as a set of profiles created using a custom Persona template. The scenario has been linked with the profiles by mapping the needs of the different Personas onto the scenario, i.e. by highlighting the steps or resources important specifically for them. A bird's eye view of these results is presented in Figure 1.

Figure 1. Zoomed out view of the scenario, an exemplary Persona and their needs mapped onto the scenario.



Source: Own elaboration.

The scenario can be implemented partially or as a whole by guidance and validation providers. To increase the transferability of the scenario as a policy across different European countries and types of institutions, one comprehensive and customisable scenario has been developed. It is phrased generally enough (by focusing on the results reached by the candidate) to fit

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different processes and approaches, and in enough detail (e.g. by including the institutional resources needed) to help the providers in adapting it their needs and possibilities. The scenario focuses on transversal competences and does not represent the whole of guidance and validation. Nevertheless, it has been designed as a standalone process, i.e. the consecutive steps are reliant on the previous steps to have been taken, and it has been aligned with the usual guidance and validation stages to facilitate customisation. Like any policy recommendation, it should not be treated as a fit for all, but rather as a starting point for developing individual fit-for-purpose procedures.

The scenario in full resolution, as well as all the Personas and their needs mapped onto the scenario, can be found in Appendix to the report. Because the diagrams are information dense, it is recommended to read them in the versions provided in the Appendix.

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CONTEXT

GENERAL PROJECT OVERVIEW

The activities and results described in this report have been planned and implemented as part of the 'Validation of transversal skills across Europe' (TRANSVAL-EU) project.

The project was co-funded by Erasmus+, KA3 – Policy Reform – Policy Experimentation (626147-EPP-1-2020-2-AT-EPPKA3-PI-POLICY). It started in March 2020 and lasted for 30 months. The TRANSVAL-EU partnership consisted of 16 partners from 7 EU countries and was supported by a consortium of experts.

The aim of the project was to experiment on how to make transversal competences, that is competences applicable across different sectors and contexts, more visible and embedded in guidance and validation processes across Europe.

The following solutions aimed at capacity building among the guidance and validation practitioners were developed:

- a Transversal Competence Framework (Figure 2.),
- Competence Profiles for practitioners,
- a Curriculum for practitioners,
- a complementary Toolkit.

Figure 2. The first level description of the Transversal Competence Framework.

Source: TRANSVAL-EU (2021).

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These solutions were tested from autumn 2022 until summer 2023 in 5 field trial countries: Austria, Belgium, Italy, Lithuania and Poland.

The field trials consisted of training practitioners from each field trial country (around 20-40 depending on country) in working with transversal competences and using the tools provided. The practitioners were than to introduce transversal competences into the guidance and validation process they conducted for a number of candidates (around 20-60 depending on country). The Curriculum was pre-tested during a European training conducted in English, which was the basis for the national training sessions in native languages. The field trial partners had relative freedom in deciding how to organise the training, communicate with the practitioners and provide additional support.

The experimentation was monitored and evaluated using methods described in the next section.

Based on the results of the field trials, national sustainability strategies, a European research report and policy coherence report were created, as well as recommendations including the guidance and validation scenario[1].

According to the project design, the main aim of developing the scenario was to define and illustrate in a graphical form the actions to be taken by the guidance and validation practitioners that allow for the inclusion of transversal competences in their work. The scenario was meant to be a model process applicable to different guidance and validation systems and provisions, as well as be research-based.

An important premise for the scenario was that it should be adjusted to the learning pathways of people taking part in guidance and validation as candidates. The pathways should be understood here as the most common or otherwise most exemplary types of biographical trajectories concerning education and work that could be observed among the candidates taking part in the field trials. It was assumed the same types of pathways can occur in different countries and that one scenario can cover more than one pathway.

RESEARCH ACTIVITIES OVERVIEW

The project included a series of research activities which began with an investigation of the field and state-of-art mapping by way of desk research, which focused on transversal competences (standards, definitions) and validation of prior learning on the European and country level (policies, recommendations, good practices, solutions specific to the field trial countries). A following stakeholder survey supplemented this information with benefits and challenges related to including transversal competences in guidance and validation provisions from the point of view of experts and policy makers. This was summed up in a state-of-art report (Looney & Santibañez, 2021). A phenomenographic approach to the field research methodology was also defined (Vrije Universiteit Brussel, 2021; De Greef et al., 2023).

[1] For more general information on the project, as well as to download the project results see the project website (OeAD-GmbH, 2021).

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While the solutions for practitioners were being developed, a field study has been conducted with the following aims:

1. identifying the needs of the practitioners and developing further solutions with their participation – to this end two Design Thinking workshops with practitioners from the 5 field trial countries were conducted;
2. preparing a quantitative evaluation of the impact of the project on the practitioner's competency level related to working with transversal competences – the Competence Survey was developed and the pre-test was launched (Gmaj et al., 2022a).

Before the field trials started, a monitoring tool in the form of a spreadsheet has been created for the project partners to fill out during testing. It covered basic sociodemographic information about the practitioners and the validation stages included in each country (TRANSVAL-EU, 2022a).

Data on the candidates was gathered by a separate survey that was also part of the project's ex-ante and ex-post evaluation. It covered basic sociodemographic characteristics of the candidates, as well as variables of social inclusion, labour market participation and transversal competences (De Greef, 2022a; De Greef, 2022b).

It is worth noting here that both for the practitioners and the candidates, the evaluation measured their self-reported sense of competency and its increase/decrease after the project intervention, without deploying external or objectified assessment methods. In the case of the practitioners this involved skills related to using transversal competences as a concept when working with candidates, and in the case of the candidates – possessing transversal competences themselves. It is also worth noting, that the candidates did not undergo a separate training on transversal competences, but the project recognised the formative aspect of guidance and validation.

Finally, a qualitative evaluation of the intervention has been prepared based on the IDI method. The interviews were conducted with the practitioners in their native language by the project field trial partners. To assure the reliability of the results, guidelines on how to conduct the IDI's were created and distributed among the partners (TRANSVAL-EU, 2022b).

All surveys and interviews targeting the practitioners and candidates were conducted in their native languages. In the case of the IDI's, the transcriptions were translated in English and then analysed[2].

More specifics on the use of the aforementioned research results while developing the guidance and validation scenario has been described in the next section.

[2] For more information on research activities related to the ex-ante and ex-post evaluation of the impact of the project on the practitioners and candidates, see De Greef, Fellinger & Dzhengozova (2023).

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METHODOLOGY

ANALYSIS OF INTERNAL SECONDARY DATA

When planning for the development of the scenario and the candidates' profiles, research results already obtained in the project were analysed as internal secondary data, as none of the research tools was designed to cover these topics specifically. An overview of the data used and to what purpose is summed up in Table 1. at the end of this section.

The most relevant source of information for profiling the candidates was the evaluation of the project's impact on the candidates taking part in the field trials. It covered 256 candidates (13,3% of which were from Portugal not included in the field trials and thus excluded here as well). The following sociodemographic characteristics could be extracted from the candidate survey:

- country (Austria, Belgium, Italy, Lithuania, Poland, Portugal);
- gender (male, female);
- immigration status (autochthone, foreign);
- age (0-25 years, 26-45 years, 46-65 years);
- education (primary school, secondary school, vocational school, high school, university, other);
- years in education (5 years or less, between 6 and 10 years, between 11 and 15 years, between 16 and 20 years, over 21 years);
- job status (paid work, self-employed, voluntary work – unpaid, paid work and voluntary work, unemployed, looking for a job) (De Greef et al., 2023, p. 12).

Furthermore, the candidate survey was designed to measure the experienced increase of the following variables (mostly defined in previously conducted studies, with the exceptions noted below):

- using oral communication,
- using written communication,
- communicating using digital technologies,
- solving problems and reacting to unforeseen,
- cooperating and fostering cooperation,
- building one's career path – newly constructed variable,
- developing one's competences and profile – newly constructed variable,
- social inclusion,
- paid work,
- voluntary work,
- apprenticeship,
- job seeking,
- job under supervision,

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- transversal skills (including guidance & validation) – newly constructed variable (De Greef et al., 2023, p. 27).

This data, divided by field trial country, has been used to prepare preliminary profiles of the candidates. It was done by feeding the data into a Persona template to be than worked on with the practitioners during a Design Thinking workshop. Five Personas were prepared this way.

The following design decisions in relation to the Persona templates were taken based on the data discussed:

- ✓ Five Personas will be developed, one for each field trial country.
- ✓ The Persona template will include the following sociodemographic data: country, gender, immigration status / nationality, age (with the ranges included in the candidate survey), education level achieved and job status.
- ✓ In the case of sociodemographic characteristics, the responses with the highest frequencies per country will be chosen.
- ✓ The Persona template will include a separate section describing the effect that introducing transversal competences into the guidance and validation process had on the candidate, using for this description the variables listed above (including wording).
- ✓ In the case of the increase in the variables only the ones tested to be significant statistically will be included in the Persona description.

The most relevant source of information for the scenario development was the field study, specifically the part focused on identifying the needs of the practitioners. This was expected, as understanding their needs required the mapping of existing practices, in relation to which the project intended to make an intervention by introducing transversal competences, as well as co-designing the end solutions. Another factor that made the field study results highly relevant was the use of the Design Thinking approach, as the associated techniques were also the best fit for the development of the scenario and this compatibility could be effectively utilised.

In the field study two workshops were organised in January 2022 with 12-16 practitioners from each field trial country. During the 1st workshop one of the activities carried out covered the practitioners' workflow, i.e. their everyday tasks, tools used and challenges faced (Figure 3., Figure 4.). These information were than organised and incorporated into a description of a general guidance and validation process prepared by the researches for the 2nd workshop to be supplemented by the practitioners with tasks related to transversal competences (Figure 5., Figure 6.).

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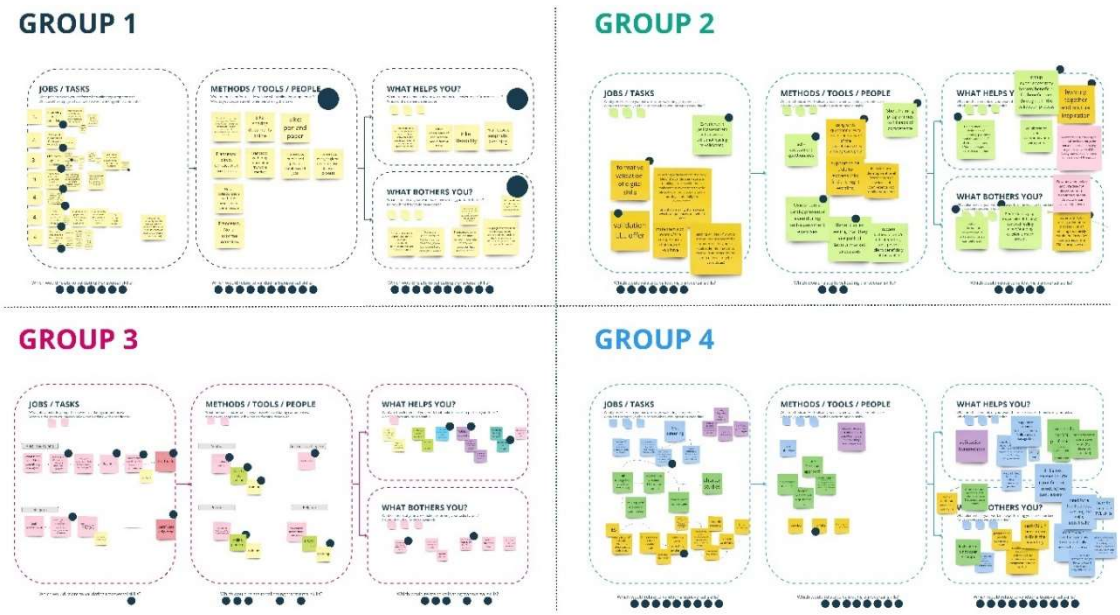
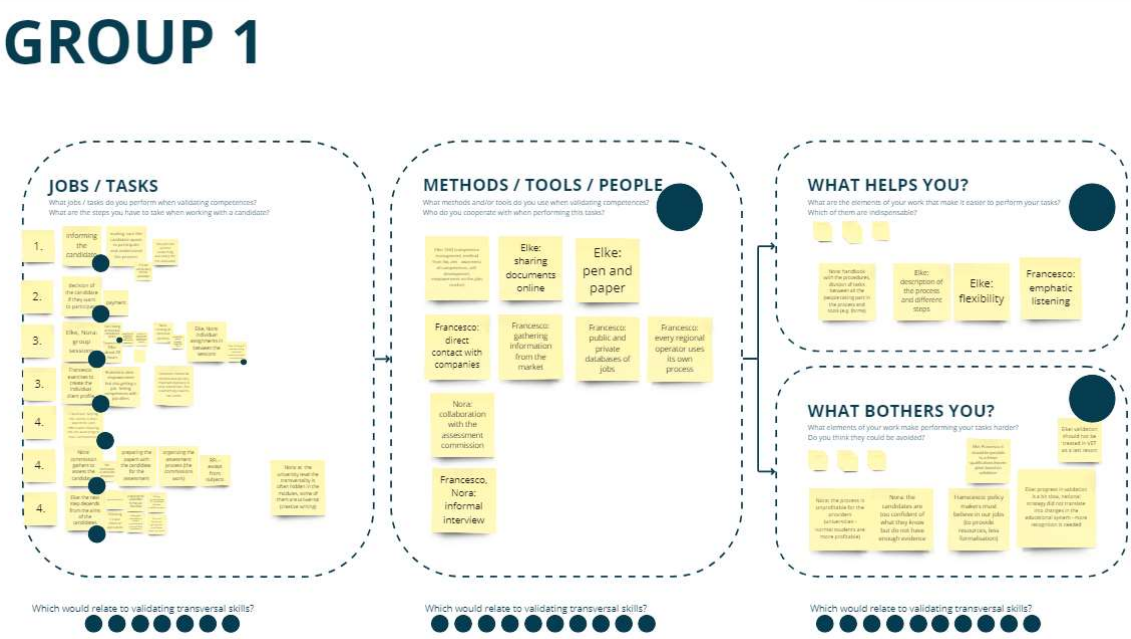
Figure 3. Practitioners' workflow. 1st field study first Design Thinking workshop results – all groups.



Source: Gmaj et al. (2022a).

Figure 4. Practitioners' workflow. 1st field study Design Thinking workshop results – group 1 zoomed in.



Source: Gmaj et al. (2022a).

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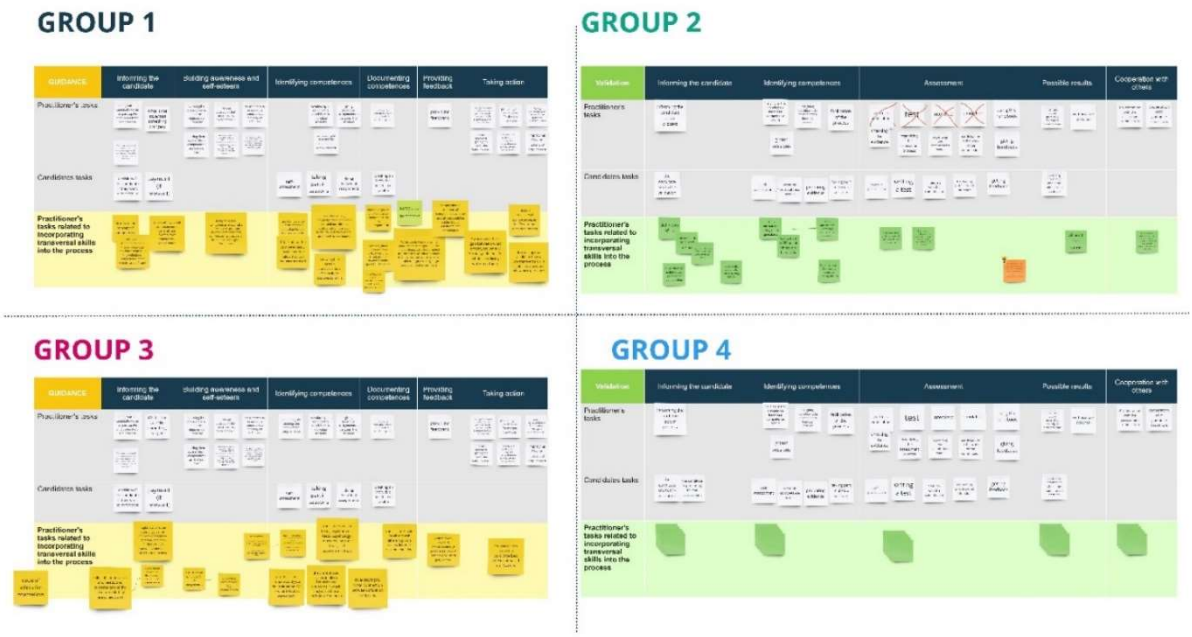
The following paragraphs are excerpts from the unpublished field study report (Gmaj et al., 2022), cited directly because of the relevance of the findings to the guidance and validation scenario.

"The description [of a guidance and validation processes] included their [the practitioners'] perspective and the perspective of the candidates, as the participants have repeatedly emphasised that their tasks are carried out in close cooperation with the candidates. It also introduces stages of the processes, but not as they are defined in literature, but rather how they emerged from the data collected. During the 2nd workshop, the practitioners were asked to familiarise themselves with the abovementioned descriptions and revise them – either by supplementing or modifying the information provided by the researchers. Then they were asked to think over the processes and propose tasks the practitioner should take in order to incorporate transversal competences into guidance and validation. (…)

Figure 5. Guidance and validation prototypes (with transversal competences included). 2nd field study first Design Thinking workshop results – all groups.



Source: Gmaj et al. (2022a).

What we aimed at during this activity was to formulate concrete actions that the guidance and validation practitioners could 'inject' into two processes – generalised versions of validation or guidance, that cannot exactly replicate national processes, due to their significant heterogeneity across systems. (…) It is worth noting that the workshop participants excluded the use of transversal competences during the assessment stage in the validation process. This opinion was based on the important role external standards – that as of today rarely include transversal competences – play on the assessment stage. But the workshop

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participants agreed the ultimate goal would be to assess transversal competences along with all other types of competences. As a result, the possibility of incorporating transversal competences was identified during the workshop mainly in relation to the guidance process and stages of the validation process taking place before assessment." (Gmaj et al., 2022, p. 25-27).

Figure 6. Guidance and validation prototypes (with transversal competences included). 2nd field study first Design Thinking workshop results – group 1 zoomed in.

Source: Gmaj et al. (2022a).

Based on this and other findings of the field study, the following recommendations relevant to the guidance and validation scenario development were formulated:

1. "The resources offered to the practitioners as part of the TRANSVAL-EU project should facilitate, or at least not impede the most prevalent and important aspect of their work – establishing and maintaining direct relationships with the candidates.

   The practitioners work with people expressing different, often negative or ambivalent emotions and attitudes related to their competences (i.e. potential and life experiences) being examined/evaluated by third parties as part of the guidance or validation process. These emotions can also stem from factors unrelated to the process itself, e.g. their difficult Personal or professional situation. As highly motivated experts with a sense of mission and willingness to help, the practitioners put a lot of effort into empowering the candidates. Performing this emotional labour while effectively helping the candidate in identifying, documenting and/or assessing their competences in an objective, professional and often partly standardised way, can be a demanding job. Transversal competences have a significant potential to help the practitioners in

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both tasks. They are universal enough to be relatively common (at least at some level of expertise), so identifying and documenting them can help build the candidates self-confidence. They are also important enough on the labour market to be a real asset for the candidate when moving forward. The missing link is a proper weight and recognition given to transversal competences for them to be considered 'worth the effort'.

2. Any tools and practical advice proposed to the practitioners as part of the TRANSVAL-EU project and related to validating transversal competences should be described in terms of: (1) specific, self-contained, single actions with related tools needed to take them or helpful to perform them; (2) instructions on how to include them at different points of any given guidance or validation procedure.

   The Your Workflow activity indicated a significant heterogeneity of the processes and tools the practitioners from different countries and institutions use. One way of coping with this diversity when introducing a new element in the form of transversal competences is to propose a map of possible tasks or actions that can be taken independently from each other, rather than a holistic, parallel process with the transversal competences at its centre. Such actions have been proposed by the workshop participants and described in the previous section. The same applies to related tools - using one should not imply the use of others, although maximal compatibility of the proposed tools as well as compatibility with the tools used by the practitioners in their daily work (irrespectively of working with transversal competences), would be desirable. It is worth noting that no actions related to transversal competences have been proposed for the assessment stage of the validation process and therefore - the stage on which the validation practitioner communicates the assessment results to the candidate. Therefore the significance and potential of incorporating transversal competences relates mainly to the guidance process and stages preceding assessment in the validation process." (Gmaj et a., 2022, p. 41-42)These recommendations were taken account of during the development of the preliminary guidance and validation scenario presented to the practitioners during the Design Thinking workshop.

After analysing these findings, the following design decisions related to the scenario were made:

- ✓ The guidance and validation scenario will mainly include the characteristics of the guidance process and in the case of validation – the stages corresponding to guidance. The wording of the process stages will be based on the field study results and thus will not be limited to the usual nomenclature related to validation, but will strategically include the following terms: 'identification', 'documentation', 'assessment' and 'certification'.
- ✓ Because of the discrepancies between the guidance and validation processes in different countries, regions, systems and institutions, only the tasks related to transversal competences will be part of the scenario, so that they can be included in any process after customisation.

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- ✓ Because of the heterogeneity of the guidance and validation practices, instead of multiple scenarios (e.g. one for each persona or country) considered before the analysis, a single comprehensive scenario will be developed. It should be worded generally enough to be understood as applicable in different contexts, but it should also include specific information on what the tasks entail resource-wise from the perspective of the institution and system, what is the practitioner's working with the candidate workload and how the tasks and resources are related to each other in order for the scenario to be customisable.
- ✓ The scenario will centre the experience of the candidate and the results she can achieve when working with transversal competences.
- ✓ The practitioner tasks will prioritise concrete, self-contained actions to be taken in order to facilitate the use of transversal competences by the candidate.

More information about the Persona templates and the preliminary scenario worked on with the practitioners is presented in the next section.

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Table 1. Internal secondary data analysis summary.

ID	*Research activity*	*Method*	*Topic covered*	*Relevance to the scenario*	*Source*
WP2.desk research	A2.1 State-of-the-art mapping	desk research	European and country-level policies and practices related to transversal competences and validation of prior learning	assuring the scenarios are not in conflict with the countries' systems	Looney & Santibañez (2021)
WP2. stakeholder survey	A2.2. Action-Research methodology	survey	benefits and challenges of the validation of transversal competences	substituting the cost and benefit analysis of the scenarios as policy	Looney & Santibañez (2021)
WP3.field study	A3.2 Field research methodology A5.1 Reporting on the field trials experimentation	Design Thinking workshops	prototyped set of actions for practitioners (p. 18-43)	informing the preliminary guidance and validation scenarios (crucial source of data)	Gmaj et al. (2022b)
WP3.monitoring survey	A3.4. Setting up of the national and regional pilots ('unit of analysis')	survey	stages of guidance and validation included in the field trials (identification, documentation, assessment, certification)	informing the preliminary guidance and validation scenarios	TRANSVAL-EU (2022a)
WP5.candidate survey #1	A5.2 Evaluation of the field trials experimentation	survey (ex-ante)	candidates' background and plans, general activities	informing the preliminary types of learning pathways / candidates' profiles	De Greef (2022a) De Greef, Fellinger & Dzhengozova (2023)
WP5.candidate survey #2	A5.2 Evaluation of the field trials experimentation	survey (ex-post)	candidates' plans, general activities, knowledge on transversal skills	informing the preliminary types of learning pathways / candidates' profiles	De Greef (2022b) De Greef, Fellinger & Dzhengozova (2023)

Source: Own elaboration.

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DESIGN THINKING

The task of developing the guidance and validation scenario as well as supplementing the basic quantitative data on the candidates' profiles required coming back to the practitioners and proposing a mode of cooperation without the burden of time-consuming conceptual work. It is worth noting, that by the time the scenario was to be developed, the practitioners already helped carry out the work-heavy field trials, as well as provided feedback on it as part of the evaluation study. The best way of facilitating the sharing of their knowledge and experience, as well as consulting on the desirable shape of the scenario, was to revisit the Design Thinking approach utilised during the field study. An added benefit of this mode of action was building a sense of ownership among the practitioners related to the project recommendations and providing space for peer exchange.

Design thinking has its roots in industry design, especially the IT business sector, therefore it is most often applied to a 'service' or 'product', which is to be designed or redesigned according to the users' needs (Brzozowska-Brywczyńska, 2019). It favours quick insights about the user experience instead of comprehensive representative studies, early testing of low-cost prototypes instead of waiting for different production stages to end and an iterative development process instead of a waterfall model. From the perspective of social sciences it shares many basic assumptions with the action research paradigm (centring the research subjects and their experiences, activating them by co-designing solutions for them etc.). As long as the researchers acknowledge the business/profit-driven roots of this framework, as well as their influence on the (especially hidden) meaning of the terms used in Design Thinking versus action research and control for it, the framework can be successfully applied to policy development.

Many different types of Design Thinking processes have been developed, but in the TRANSVAL-EU project a slightly shortened Stanford Design Thinking process was chosen for the field trials, as well as for the scenario development (Figure 7.) (Helman, Rosienkiewicz, 2016). The abridgement relates to the last 'testing' phase, which has been removed due to it being covered by the field trials.

When in the field study all other stages of the process were applied, in the scenario development only the empathising phase and the prototyping phase were actually implemented. This was caused by three factors:

1. the design challenge and idea for the solution was already largely predefined by the project proposal;
2. the work on the scenario can be treated as a continuation of the field study workshops as it was heavily based on its results; therefore the need to define and ideate again with the same type of participants was small;
3. time constraints.

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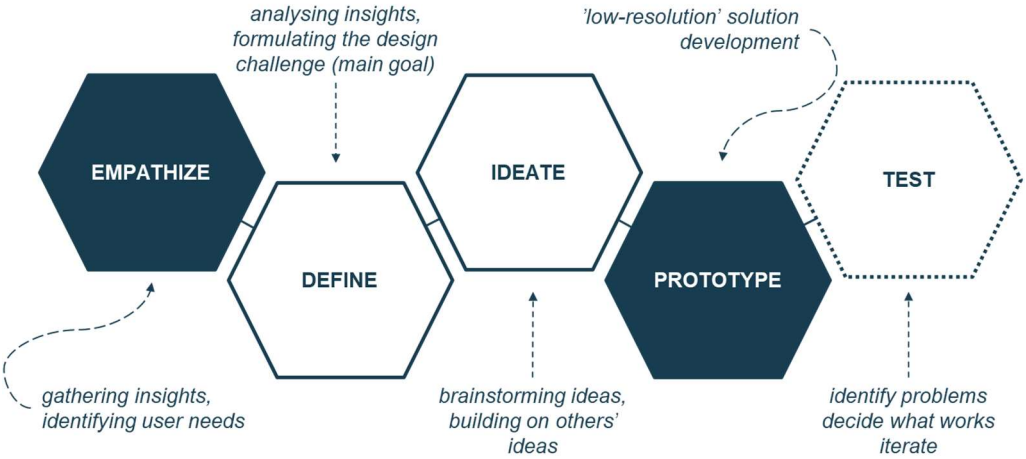
The empathising stage consisted of gathering the practitioners insights on the candidates they usually work with and identifying the needs of the candidates by proxy. Applying the prototyping stage meant co-designing the scenario.

Figure 7. Abridged Stanford Design Thinking process adopted for the development of the scenario.



Source: Own elaboration based on Planter (n.d.).

The following Design Thinking techniques were used on these stages:

- Personas (empathising stage) – one of the techniques used in the field study as well, it is a way of gathering and systematising knowledge about different user groups, by defining their needs, goals, motivations, behaviours, fears and crucial attributes (Gmaj et al. 2022).

  How it was used: The Persona template was prepared to accommodate the data from the candidate survey in accordance with the design decisions driven by this data, as it has been described in the previous section of the report. The part covering the sociodemographic characteristics was placed at the top of the template. The section about the impact of the project on the candidates was placed at the bottom of the template and marked as 'response to G&V including 'TSC', where 'G&V' is an abbreviation of 'guidance and validation' and 'TSC' – for 'transversal competences and skills'. The template had a place for a number, as well as a name and simple portrait. Additional sections included in the template covered the goals, motivations, needs and challenges faced by the candidate. These were crucial to be worked on with the practitioners, as no relevant data was gathered in the project before that. Five Personas were created with prefilled sections covering the sociodemographic characteristics and project impact. They were also numbered, named and given a portrait. The partially prefilled Personas were presented to the practitioners to be completed. The template and related activity were presented to the workshop

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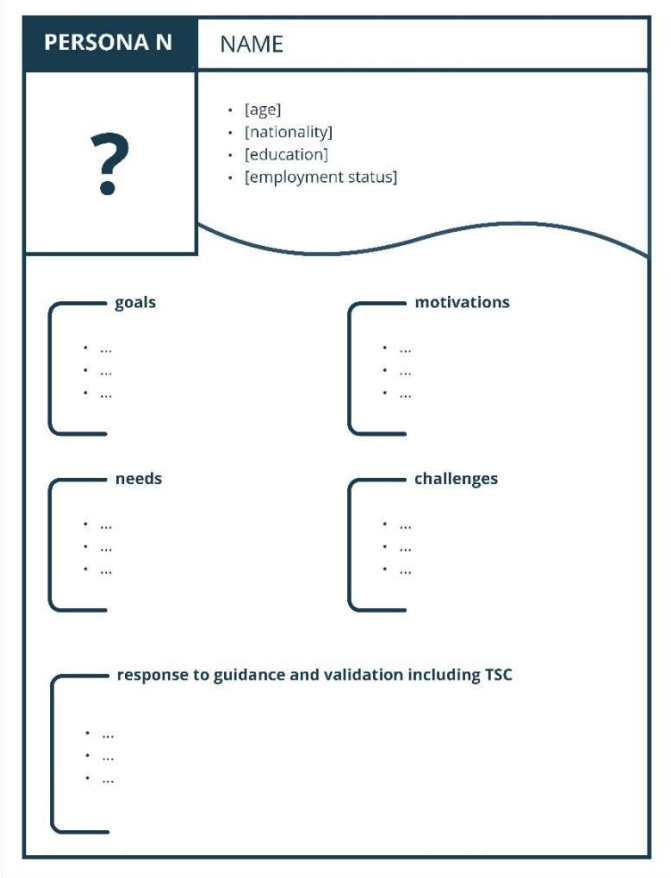
participants using the name 'Personas'. The template is presented in Figure 8. And the activity in Figure 9.

Figure 8. Persona template.



Source: Own elaboration.

- User Journey Map / Service Blueprint (empathising and prototyping stage) – User Journey Map is one of the techniques used in the field study for developing the guidance and validation processes that were the basis for the scenario. It is used to "visually present and interpret the relationship between a product/service/process and a person from the perspective of time and space. A Journey Map helps to understand the behaviours of people who use certain solutions or products." (Gmaj et al., 2022, p. 13). There is no one way to prepare a User Journey Map, but most often it is a diagram created on a whiteboard or online whiteboard. Service Blueprint is a similar form of visualising a service, but with a focus not only on the customer experience, but also on all of the institutional processes and resources needed for providing the service, including tasks related to directly serving the customer (often called 'frontstage'), channels of communication with the customer, crucial moments allowing the service to happen and defining the customer experience (called 'touchpoints'), as well as tasks and resources related to facilitating the delivery of the service that are invisible for the customer (called 'backstage'). As it is in the case of the

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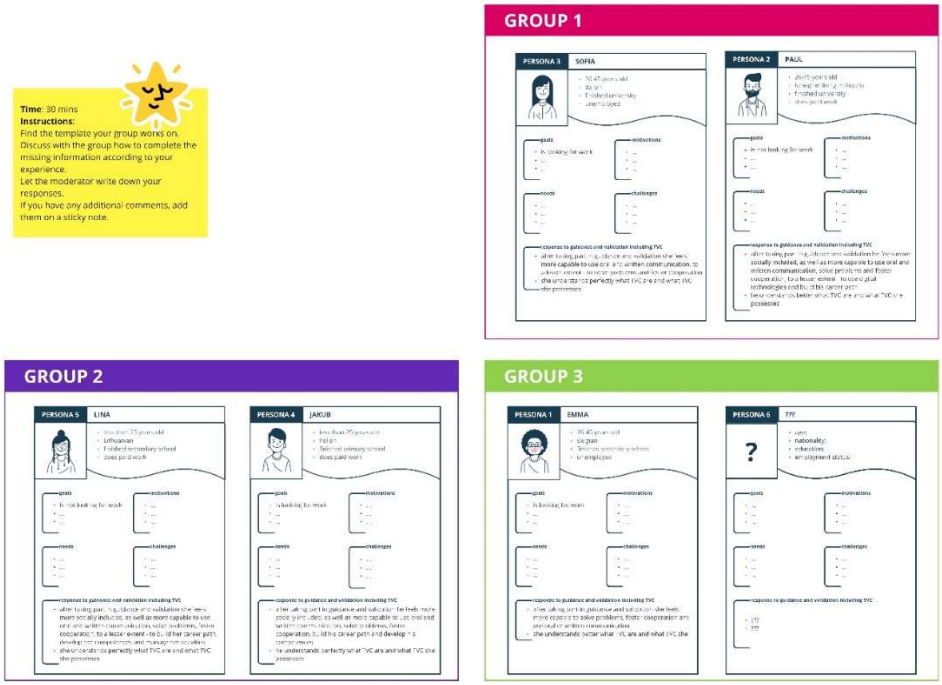
User Journey Map, there is no one right way of preparing a Service Blueprint, although usually it has a form of a diagram visualising the process overlaid on a table representing the different stages (in the columns) and layers of the institutional resources (in the rows).

How it was used**:** The User Journey Map technique was first used in the prototyping phase during the field study's 2nd workshop. The activity was called 'Process Design' and it covered the topic of how to include transversal competences in the guidance and validation processes (see examples in Figure 5. and 6.). For the purpose of developing the guidance and validation scenario, many elements of this field study result were transferred after reformulating them to a similar diagram, this time structured after the User Journey Map as well as Service Blueprint. The main changes included focusing only on the tasks or actions related to transversal competences, centring the candidates' experience rather than candidates' tasks, adding institutional frontstage and backstage actions and resources, as well as channels of communication. This activity was simply called the 'G&V scenarios' and is presented in Figure 10. It comprised of inviting the practitioners to provide feedback on the wording and structure, by remodelling different elements of the scenario or adding new ones. But most importantly the practitioners were asked to look at the scenario from the point of view of the candidate Personas they were already familiarised with and decide whether it needed changes to accommodate the needs of the Personas and what aspects of the scenario are particularly important for each Persona. The results are presented in the next section of the report.

Figure 9. The 'Personas' activity on the Miro board before the workshop.



Source: Own elaboration.

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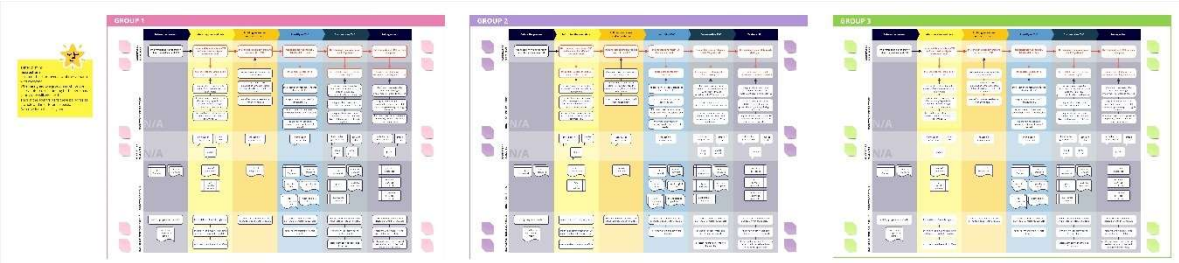
Figure 10. The 'G&V scenario' activity on the Miro board before the workshop.



Source: Own elaboration.

These techniques were implemented during a workshop with the guidance and validation practitioners, who took part in the field trials. A workshop is a fairly common mode of collaboration applied in Design Thinking, as it allows the participants to be active contributors to the design work and share their experiences freely (Hajdas, Wrona, 2018). To achieve these results, "the facilitators should prioritise inclusion, safety and mutual respect when building the workshops' atmosphere, as well as find a balance between providing the participants with a structure by using Design Thinking techniques and retaining flexibility by leaving space for unexpected insights and discussions" (Gmaj et al., 2022, p. 11). To moderate the workshop activities effectively, the number of participants should not to exceed approximately 20 people.

In order to allow for the participation of practitioners from different countries, the workshop was organised as an online event conducted in English, hosted on one of the platforms for video communication and utilising an online whiteboard for collaboration that contained all the activities and materials prepared beforehand.

The workshop participants had to meet the following conditions:

- speak English fairly fluently so that the language barrier would not a be a hindrance in their active participation in the workshop,
- have advanced knowledge and understanding of guidance and validation,
- possess current experience and skills in conducting guidance and validation,
- have taken part in the TRANSVAL-EU field trials,
- ideally – have taken part in the field study workshops as well.

TIMELINE, ORGANISATION AND PARTICIPANTS

The activities related to the guidance and validation scenario lasted from March until July 2023 according to the timeline presented in Figure 11.

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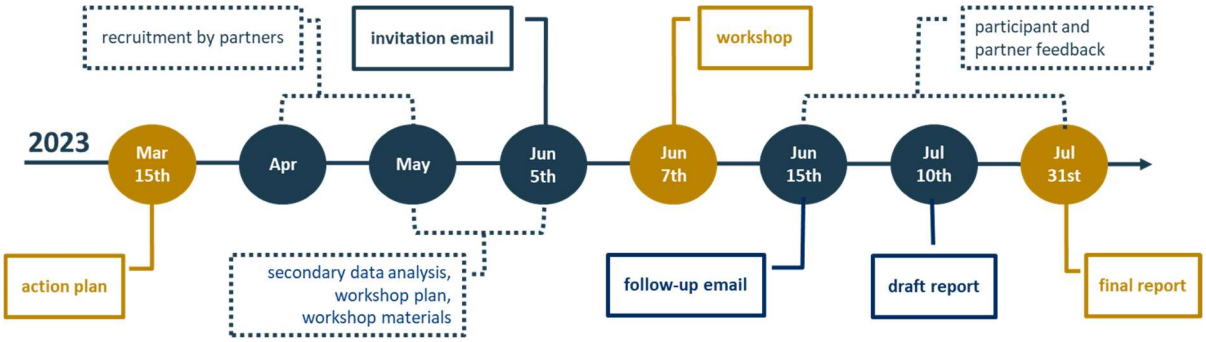
Figure 11. Activity timeline.

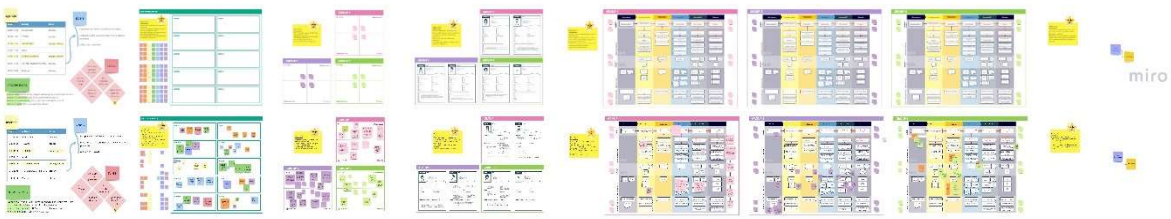


Source: Own elaboration.

After deliberations with the partners, it was decided that approx. 15 participants (approx. 3 per field trial country) meeting the requirements described in the previous section, will be recruited. The recruitment process was conducted by the project partners from each field trial country using various channels and coordinated by the project co-leader, the Lifelong Learning Platform. Practitioners from Iceland, a country represented among the project partners but not taking part in the field trials, were additionally invited.

The workshop draft plan and activities were designed on the turn of May and June 2023. All the workshop activities and materials, including the preliminary versions of the candidate Personas (partially prefilled templates) and the preliminary version of the guidance and validation scenario, were prepared in Miro, a collaborative online whiteboard tool (Figure 12.).

Figure 12. Miro board prepared for the design thinking workshop – before and after the workshop.



Source: Gmaj, Fijałkowska & Pierwieniecka (2023).

16 formal email invitations covering the time, links and plan of the event (Table 2.), as well as basic information on the TRANSVAL-EU project and the aim of the activities, were sent two days beforehand.

The workshop was organised and conducted on June 7th 2023 by Iwona Gmaj Insight in cooperation with the Polish project research and field trial partner, the Educational Research Institute (IBE). It was hosted on Google Meets (Google Workspace paid version provided by

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the Polish partner) and aforementioned Miro. The moderators were the following experts and researchers: Iwona Gmaj (Iwona Gmaj Insight), Barbara Fijałkowska (IBE) and Roksana Pierwieniecka (IBE), with the technical support of Joanna Śmigiel (IBE).

Table 2. Workshop plan.

Time	Activity	Form
10:00-10:30	introduction	plenary
10:30-11:00	1. SWOT	groups
11:00-11:30	2. PERSONAS	groups
11:30-11:45	break	
11:45-12:15	3. G&V SCENARIO	groups
12:45-13:00	Wrap up	plenary

Source: Own elaboration.

Because of some last minute problems with attending the workshop (sudden change of plans, technical problems) reported by two participants (one from Austria and one from Lithuania) on the day of the workshop, 13 participants took active part in the event.

The workshop was evaluated using an online form, which included the following statements to be rated on a 5-point scale (received rating included in parenthesis):

1. The online platform was appropriate. (4,4)
2. The duration of the meeting and the schedule were properly planned in order to achieve the goals of the workshop. (3,2)
3. Please provide an overall rating of the meeting. (4,6)
4. Please provide an overall rating of the content discussed during the meeting. (4,6)
5. Please provide an overall rating of the materials and tools used during the meeting. (4)
6. The workshop presenters and facilitators were well prepared. (5)

7 participants filled out the form and the overall rating was relatively high, with the lowest relating to the duration of the workshop. In fact some activities had to be rushed and the last one (stakeholder mapping) was forfeited entirely to secure more time for activities with higher priority. This was partly due to delays resulting from technical issues.

A follow-up email containing chosen workshop results, i.e. all the Personas, the adjusted scenario and the needs of each Persona mapped onto the scenario, was sent on June 15th 2023 to the participants in order to:

- grant all them additional time to provide feedback on the workshop results,
- complete the partly unfinished Austrian Persona 2,

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- complete the unfinished Lithuanian Persona 5 and comment on the mapping of their needs onto the scenario proposed.

Final feedback has been received on July 13th.

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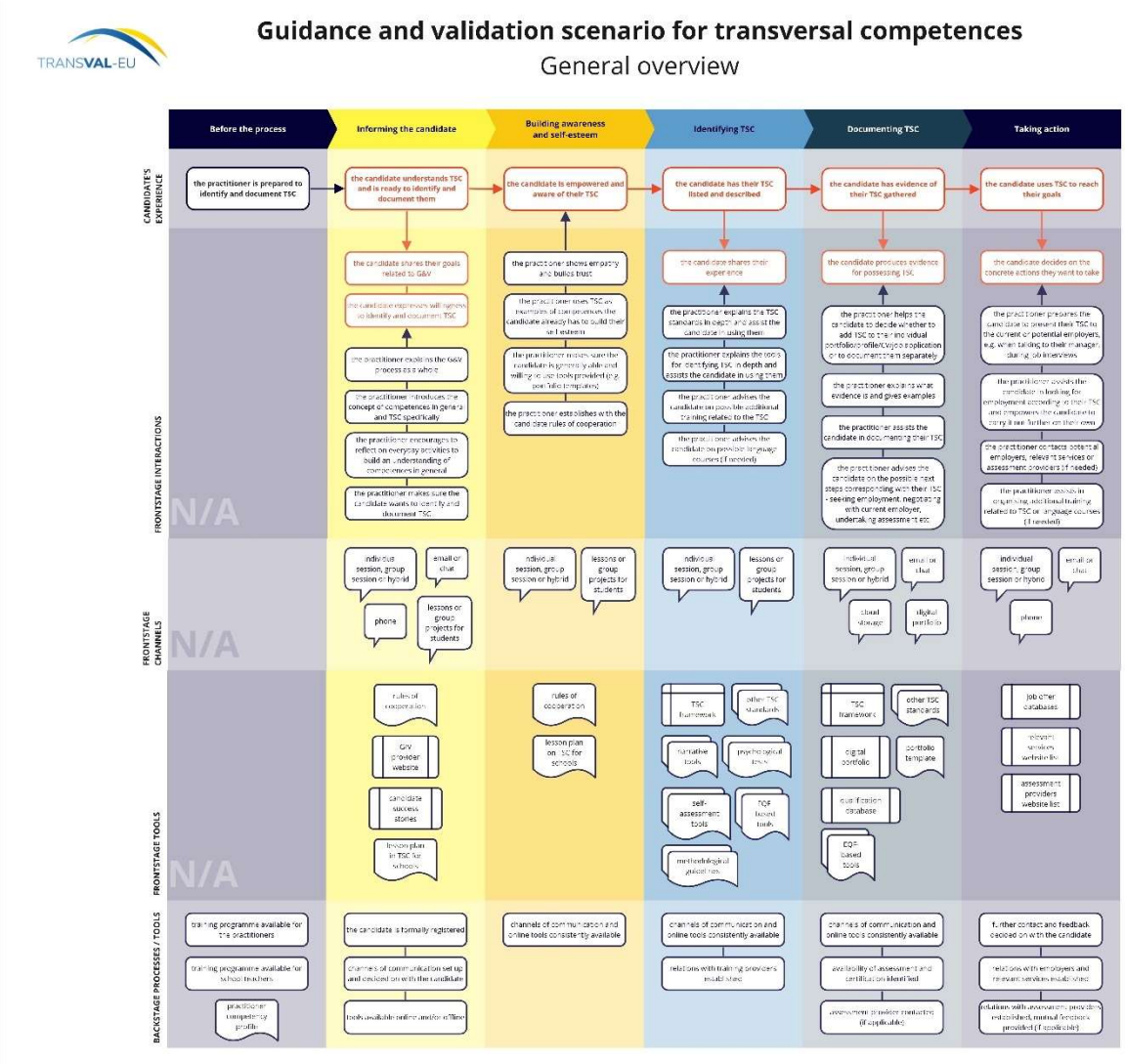
RESULTS AND GUIDELINES

GUIDANCE AND VALIDATION SCENARIO

The guidance and validation scenario aims at illustrating in one comprehensive diagram the whole process of working with transversal competences during guidance and validation. Because of that, it is information dense and needs to be read in high resolution with the possibility of zooming in or on a printed version large enough to be deciphered. The scenario is presented in full resolution in the Appendix. In Figure 13. below the scenario is zoomed out to grant the reader a general idea of the results, followed by guidelines on how to read it.

Figure 13. The guidance and validation scenario.



Source: Gmaj, Fijałkowska & Pierwieniecka (2023).

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Although the scenario can be a standalone process and is presented as such, it was developed first and foremost to be merged with existing guidance and validation procedures. It is assumed that such merging would in most cases imply the customisation of the scenario, that is:

1. the mapping of the different tasks listed in the scenario onto the existing procedure;
2. reformulating, cutting out the tasks or adding new ones if needed;
3. taking stock of existing channels of communication and resources available to a given institution and comparing them with the ones required for the implementation of given tasks listed in the scenario;
4. strategically adding or changing the channels of communication or resources in order to implement the scenario;
5. quality assurance of the resulting process, including continuous monitoring of the results achieved, gathering feedback from the candidates and the practitioners, tweaking and redesigning the process accordingly.

The scenario is a diagram overlayed on a table with 6 columns and 6 rows representing the different stages and layers of the process. Some text boxes in the diagram are connected with arrows representing the sequence of events, mainly the ones describing the candidate's experience and the actions taken by the candidate and the practitioner during their interactions. The rest of the boxes are assigned to a section of the table, but are elements that can be mixed and matched during customisation.

The text boxes have different shapes depending on their contents: the tasks or actions are presented in rectangles and the communication channels and resources – in different shapes corresponding to their characteristics. For example the communication channels are presented in a comic bubble shape.

The columns of the table describe the 6 stages of the scenario (1st row) that should allow the candidate to achieve the desired results when working with transversal competences:

1. before the process,
2. informing the candidate,
3. building awareness and self-esteem,
4. identifying the TSC,
5. documenting the TSC,
6. taking action.

These stages have emerged from the Design Thinking workshops as a best fit for describing the different guidance and validation practices from participating countries and therefore do

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not correspond to any one given standard. Nevertheless these or similar stages can be found in most guidance processes aimed at recognising competences and at the initial stages of most validation processes. The terms 'identification' and 'documentation' used in the scenario refer to the wording established in literature and EU documents such as the 2012 Council Recommendation on non-formal and informal learning (Council of the European Union, 2012). Assessment is not included as a separate stage due to the practitioners regarding it as in most cases impossible to be applied to transversal competences without formal national standards covering this type of competences explicitly (for more see page 11 of the report). But the option of referring the candidate for assessment has been covered as a possible task in the last two stages of the process not to exclude it entirely as something that could happen given optimal circumstances.

It is worth noting here, that the first stage ('before the process') does not relate to any direct result for the candidate as it covers the training and preparedness of the practitioners to work with transversal competences.

The scenario as a whole is structured around the candidate's experience (2nd row), i.e. the result they achieve step by step when working with transversal competences. The steps result from one another and thus are connected by arrows. They include the following:

1. the candidate understands TSC and is ready to identify and document them,
2. the candidate is empowered and aware of their TSC,
3. the candidate has their TSC listed and described,
4. the candidate has evidence of their TSC gathered,
5. the candidate uses TSC to reach their goals.

The following 4 rows cover the 4 levels of institutional tasks and resources needed to help the candidate achieve each of the steps described, that is:

1. frontstage interactions (interactions between the candidate and the practitioner),
2. frontstage channels (channels of communication between the candidate and the practitioners),
3. frontstage tools (tools used by the practitioner to conduct the subsequent stages of the process and by the candidate to achieve the desired results),
4. backstage (all resources and tasks/actions/results provided by the institution conducting guidance and validation were the practitioners work).

As a general rule, if a given interaction takes place on a given stage of the scenario, the frontstage channels and tools, as well as backstage resources and tasks are needed to facilitate this interaction. But during customisation some elements can be forfeited, e.g.:

- the communication channels can be selected from according to the provider's

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preferences;

- if the provider works only with adults already out of the school system, he will not need a lesson curriculum dedicated to transversal competences;
- when no assessment is to be provided to the candidates, no institutional relations between the guidance provider and the assessment provider have to be established etc.

In the case of two sections of the table no elements of the diagram have been included, that is in the frontstage interactions and frontstage tools for the 'before the process' stage. This is because the scenario is centred on how the provider engages with the candidate, so internal processes such as the training of practitioners or channels of communication used for that end fall outside the 'frontstage' level of the process as it has been defined in the scenario. But some backstage resources have been included, like the training curriculum for practitioners.

Two important resources listed in the scenario have been developed in the TRANSVAL-EU project:

1. the Transversal Competence Framework,
2. a training programme for practitioners[3].

PERSONAS AND THEIR NEEDS

All the developed Personas are described as if they were a concrete person with a name, age, education history, employment etc. The goal of this approach was to give a human face to the concept of learning pathways, as well as to the research data gathered in the course of the TRANSVAL-EU project.

On one hand, it is important to remember the end result is not based on any individual person but represents a generalised type of learner that could show up at a guidance and validation provider. On the other hand, the Personas should also not be understood as statistically representative of the whole population of candidates in each country, even though some quantitative evaluation data about the candidates taking part in the field trials was utilised. To sum up, thanks to the qualitative approach and techniques used, the Personas represent mainly the knowledge and experience accumulated by the practitioners that took part in the Design Thinking workshop as experts in their field.

The Persona descriptions include the following information:

- basic sociodemographic characteristics – age, immigration status / nationality, education, employment status;

[3] To download the project results see the project website (OeAD-GmbH, 2021).

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- goals – what they want to achieve in their working life but also more generally in their self-development;
- motivations – what drives them in their self-development;
- needs – what specific support should be provided to them or taken account of;
- challenges – what are the main barriers faced by them in their self-development;
- the impact of including transversal competences in guidance and validation they take part in (described as 'response to G&V including TSC').

Because the Personas were created in the context of guidance and validation, their descriptions are focused on personal development seen mainly through the lens of employment and training, but with a humanistic and holistic approach added by the practitioners. They see and understand the importance of such factors in the candidate's life as work-life balance, child care, difficulties in forming personal relationships as a foreigner, lack of regional provisions available, isolation experienced during the pandemic etc.

All the Personas descriptions can be found in the Appendix, with one example presented in Figure 14.

One of the aims of developing these profiles was to illustrate how different the characteristics of the candidates and therefore their needs related to guidance and validation for transversal competences can be. It was presumed it should impact the provisions offered to them. To understand it better and illustrate it clearly, these needs were identified with the practitioners and mapped onto the scenario for each Persona separately. It was done by highlighting in a different colour, corresponding with the colour used for each Persona, the text boxes representing different tasks or resources particularly important for them (example in Figure 15.).

This does not mean the rest of the scenario is not important or that the other tasks or resources do not have to be applied, but rather that the practitioners, as well as the guidance and validation providers, should pay specific attention to the marked elements of the process when dealing with candidates that share the Persona's characteristics.

Because the scenarios with the needs mapped on them are as information dense as the scenario itself, they should also be read in full resolution, as is the version provided in the Appendix.

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Figure 14. Persona 1.

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Guidance and validation scenario for transversal competences

Personas

PERSONA 1 | **EMMA**

- 32 years old
- Belgian
- finished secondary school
- unemployed

goals

- finding employment
- to be ready for changes
- job re-orientation

motivations

- economic stability
- realising her idea of the best version of herself
- being a role-model (as a parent)
- independence (in relationships)

needs

- carrier guidance
- motivation to get back to the labour market
- fixed daily routine

challenges

- lack of time
- low self-confidence (because of losing her job)
- re-skilling and/or up-skilling for her dream job
- broadening her own idea of herself and who she can be

response to G&V including TSC

- after taking part in guidance and validation she feels more capable to solve problems, foster cooperation and use oral or written communication
- she understands better what TSC are and what TSC she possesses

Source: Gmaj, Fijałkowska & Pierwieniecka (2023).

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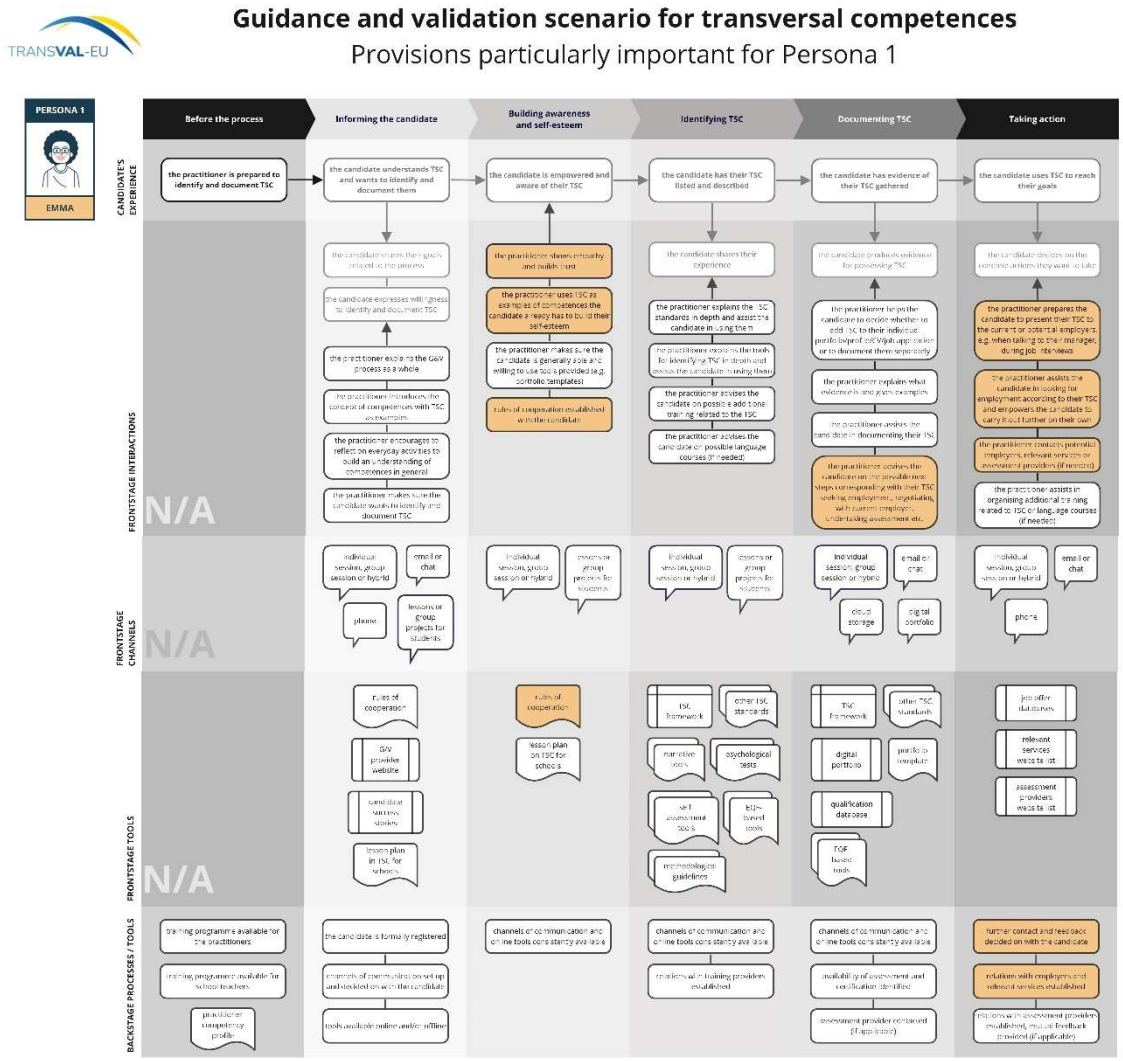
Figure 15. Provisions specifically important for Persona 1.



Source: Gmaj, Fijałkowska & Pierwieniecka (2023).

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APPENDIX

The following materials are included in the Appendix in the order listed below:

1. Guidance and validation Scenario for transversal competences. General overview.
2. Guidance and validation Scenario for transversal competences. Personas. Persona 1.
3. Guidance and validation Scenario for transversal competences. Personas. Persona 2.
4. Guidance and validation Scenario for transversal competences. Personas. Persona 3.
5. Guidance and validation Scenario for transversal competences. Personas. Persona 4.
6. Guidance and validation Scenario for transversal competences. Personas. Persona 5.
7. Guidance and validation scenario for transversal competences. Provisions particularly important for Persona 1.
8. Guidance and validation scenario for transversal competences. Provisions particularly important for Persona 2.
9. Guidance and validation scenario for transversal competences. Provisions particularly important for Persona 3.
10. Guidance and validation scenario for transversal competences. Provisions particularly important for Persona 4.
11. Guidance and validation scenario for transversal competences. Provisions particularly important for Persona 5.

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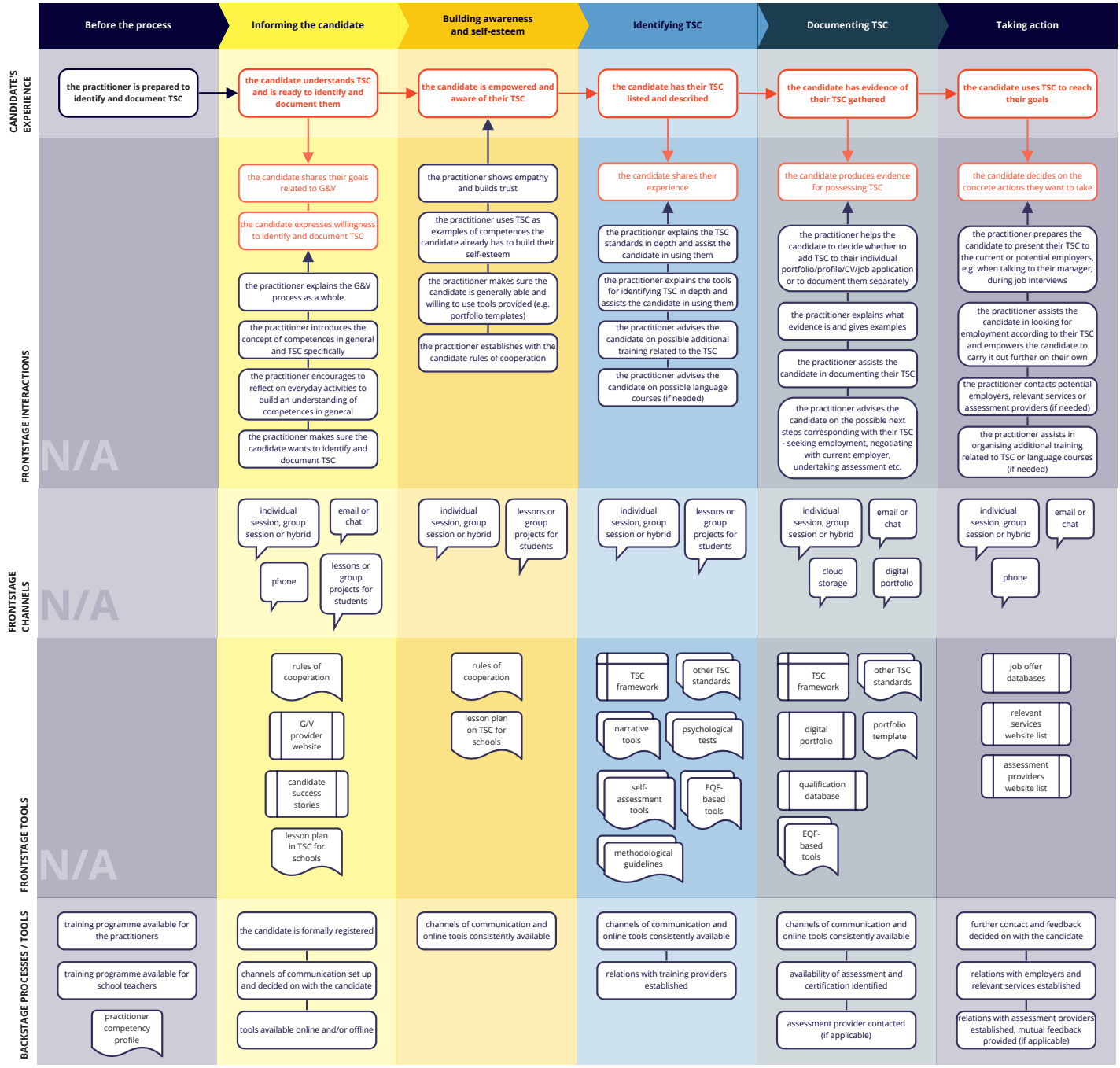
Guidance and validation scenario for transversal competences

General overview



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Guidance and validation scenario for transversal competences

Personas

PERSONA 1 — EMMA

- 32 years old
- Belgian
- finished secondary school
- unemployed

goals

- finding employment
- to be ready for changes
- job re-orientation

motivations

- economic stability
- realising her idea of the best version of herself
- being a role-model (as a parent)
- independence (in relationships)

needs

- carrier guidance
- motivation to get back to the labour market
- fixed daily routine

challenges

- lack of time
- low self-confidence (because of losing her job)
- re-skilling and/or up-skilling for her dream job
- broadening her own idea of herself and who she can be

response to G&V including TSC

- after taking part in guidance and validation she feels more capable to solve problems, foster cooperation and use oral or written communication
- she understands better what TSC are and what TSC she possesses

TRANSVAL-EU

Guidance and validation scenario for transversal competences

Personas

PERSONA 2 PAUL

- 26-45 years old
- foreigner living in Austria
- finished university
- does paid work

goals

- integration (understanding the culture, making friends, etc.)
- broadening his perspective on a personal and professional level

motivations

- further career development
- seeking fulfilment (work matching his education and rich social life)

needs

- finding a work environment allowing for better integration and personal development
- recognition of his competences

challenges

- recognition of his formal education achieved abroad
- isolating work environment
- some language barriers
- lack of information were to apply for jobs (platforms etc.)
- lack of opportunities to connect with people

response to G&V including TSC

- after taking part in guidance and validation he feels more socially included, as well as more capable to use oral and written communication, solve problems and foster cooperation, to a lesser extent - to use digital technologies and build his career path
- he understands better what TSC are and what TSC he possesses

TRANSVAL-EU

Guidance and validation scenario for transversal competences

Personas

PERSONA 3 · SOFIA

- 26-45 years old
- Italian
- finished university
- unemployed

goals

- finding employment
- understanding what she can do with her skills (opportunities)
- understanding which skills she has (awareness)

motivations

- transition from student to working adult
- financial security
- fulfilment

needs

- holistic approach to guidance (relating not only to her skills but her life as a whole)
- getting used to functioning in a working environment

challenges

- obstacles to being able to work (childcare provisions, living in an area where there's no need for her skills etc.)
- obstacles to gaining new skills (lack of time, money, training provisions)

response to G&V including TSC

- after taking part in guidance and validation she feels more capable to use oral and written communication, to a lesser extent - to solve problems and foster cooperation
- she understands perfectly what TSC are and what TSC she possesses

TRANSVAL-EU

Guidance and validation scenario for transversal competences

Personas

PERSONA 4 JAKUB

- 16-18 years old
- Polish
- finished primary school
- does paid work

goals

- finish education
- earn good money
- become independent
- quick success

motivations

- planning his future
- labour market requirements
- work-life balance
- fulfilment at work

needs

- self-development
- socialising in person
- effectiveness and practicality of the processes he takes part in
- good group dynamic

challenges

- does not value TSC outside of what is required by employers
- employers value TSC but their recruitment processes do not include them
- problem solving and accepting defeat

response to G&V including TSC

- after taking part in guidance and validation he feels more socially included, as well as more capable to use oral and written communication, solve problems, foster cooperation, build his career path and develop his competences
- he understands perfectly what TSC are and what TSC he possesses

TRANSVAL-EU

Guidance and validation scenario for transversal competences

Personas

PERSONA 5 LINA

- less than 25 years old
- Lithuanian
- finished secondary school
- does paid work

goals

- new skills
- change of career
- short time in training

motivations

- new job
- a better understanding of her capacities
- recognition of employers

needs

- encouragement
- guidance
- new knowledge

challenges

- lack of self-esteem
- needs formal certification of TSC
- lack of time

response to guidance and validation including TSC

- after taking part in guidance and validation she feels more socially included, as well as more capable to use oral and written communication, solve problems, foster cooperation, to a lesser extent - to build her career path, develop her competences and manage her activities
- she understands perfectly what TSC are and what TSC she possesses

Guidance and validation scenario for transversal competences

Provisions particularly important for Persona 1

	Before the process	Informing the candidate	Building awareness and self-esteem	Identifying TSC	Documenting TSC	Taking action
CANDIDATE'S EXPERIENCE	the practitioner is prepared to identify and document TSC	the candidate understands TSC and wants to identify and document them	the candidate is empowered and aware of their TSC	the candidate has their TSC listed and described	the candidate has evidence of their TSC gathered	the candidate uses TSC to reach their goals
FRONTSTAGE INTERACTIONS	N/A	the candidate shares their goals related to the process the candidate expresses willingness to identify and document TSC the practitioner explains the G&V process as a whole the practitioner introduces the concept of competences with TSC as examples the practitioner encourages to reflect on everyday activities to build an understanding of competences in general the practitioner makes sure the candidate wants to identify and document TSC	the practitioner shows empathy and builds trust the practitioner uses TSC as examples of competences the candidate already has to build their self-esteem the practitioner makes sure the candidate is generally able and willing to use tools provided (e.g. portfolio templates) rules of cooperation established with the candidate	the candidate shares their experience the practitioner explains the TSC standards in depth and assist the candidate in using them the practitioner explains the tools for identifying TSC in depth and assists the candidate in using them the practitioner advises the candidate on possible additional training related to the TSC the practitioner advises the candidate on possible language courses (if needed)	the candidate produces evidence for possessing TSC the practitioner helps the candidate to decide whether to add TSC to their individual portfolio/profile/CV/job application or to document them separately the practitioner explains what evidence is and gives examples the practitioner assists the candidate in documenting their TSC the practitioner advises the candidate on the possible next steps corresponding with their TSC - seeking employment, negotiating with current employer, undertaking assessment etc.	the candidate decides on the concrete actions they want to take the practitioner prepares the candidate to present their TSC to the current or potential employers, e.g. when talking to their manager, during job interviews the practitioner assists the candidate in looking for employment according to their TSC and empowers the candidate to carry it out further on their own the practitioner contacts potential employers, relevant services or assessment providers (if needed) the practitioner assists in organising additional training related to TSC or language courses (if needed)
FRONTSTAGE CHANNELS	N/A	individual session, group session or hybrid email or chat phone lessons or group projects for students	individual session, group session or hybrid lessons or group projects for students	individual session, group session or hybrid lessons or group projects for students	individual session, group session or hybrid email or chat cloud storage digital portfolio	individual session, group session or hybrid email or chat phone
FRONTSTAGE TOOLS	N/A	rules of cooperation G/V provider website candidate success stories lesson plan in TSC for schools	rules of cooperation lesson plan on TSC for schools	TSC framework other TSC standards narrative tools psychological tests self-assessment tools EQF-based tools methodological guidelines	TSC framework other TSC standards digital portfolio portfolio template qualification database EQF-based tools	job offer databases relevant services website list assessment providers website list
BACKSTAGE PROCESSES / TOOLS	training programme available for the practitioners training programme available for school teachers practitioner competency profile	the candidate is formally registered channels of communication set up and decided on with the candidate tools available online and/or offline	channels of communication and online tools consistently available	channels of communication and online tools consistently available relations with training providers established	channels of communication and online tools consistently available availability of assessment and certification identified assessment provider contacted (if applicable)	further contact and feedback decided on with the candidate relations with employers and relevant services established relations with assessment providers established, mutual feedback provided (if applicable)

TRANSVAL-EU

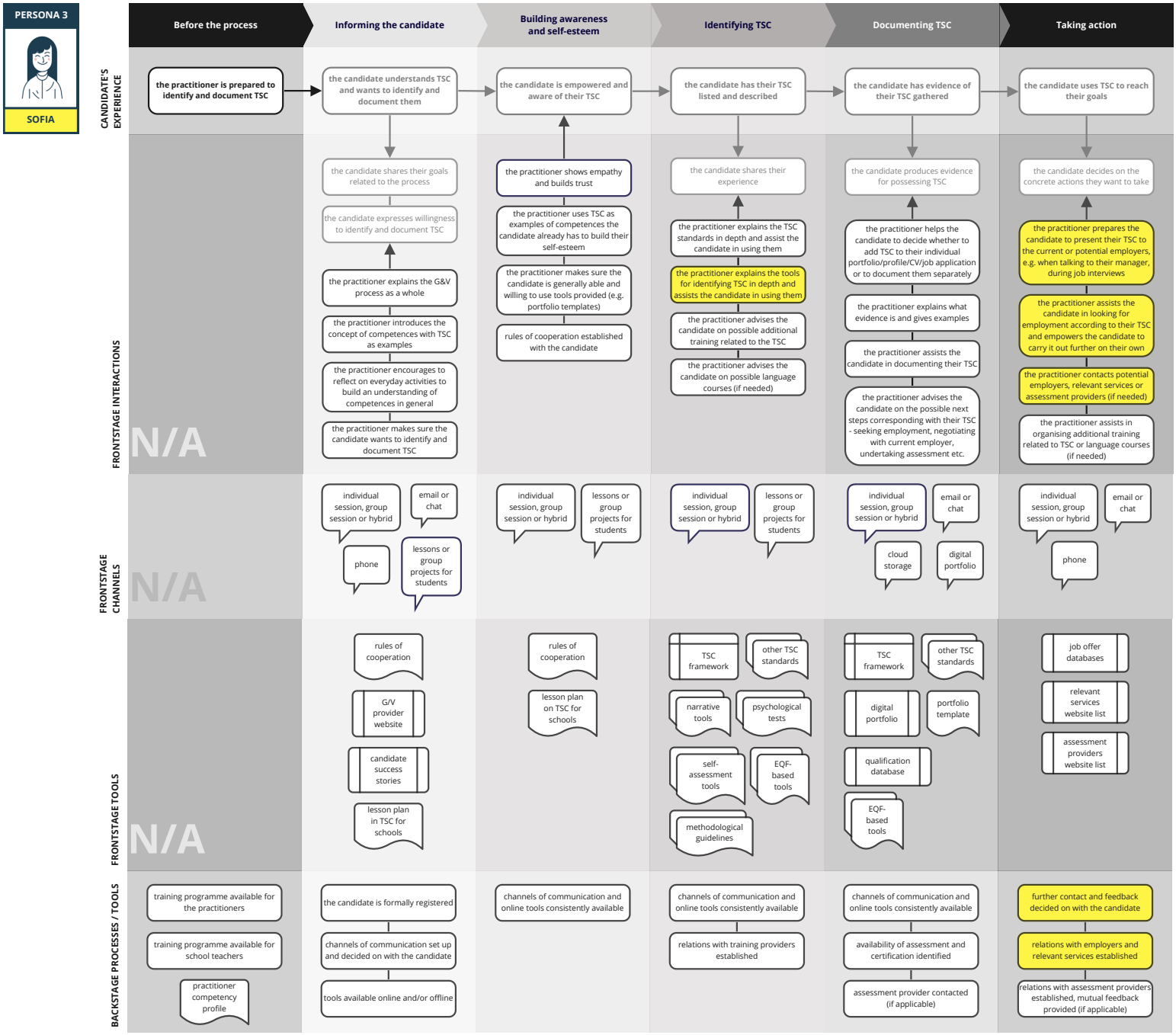
Guidance and validation scenario for transversal competences

Provisions particularly important for Persona 2

	Before the process	Informing the candidate	Building awareness and self-esteem	Identifying TSC	Documenting TSC	Taking action
CANDIDATE'S EXPERIENCE	the practitioner is prepared to identify and document TSC	the candidate understands TSC and wants to identify and document them	the candidate is empowered and aware of their TSC	the candidate has their TSC listed and described	the candidate has evidence of their TSC gathered	the candidate uses TSC to reach their goals
FRONTSTAGE INTERACTIONS	N/A	the candidate shares their goals related to the process the candidate expresses willingness to identify and document TSC the practitioner explains the G&V process as a whole the practitioner introduces the concept of competences with TSC as examples the practitioner encourages to reflect on everyday activities to build an understanding of competences in general the practitioner makes sure the candidate wants to identify and document TSC	the practitioner shows empathy and builds trust the practitioner uses TSC as examples of competences the candidate already has to build their self-esteem the practitioner makes sure the candidate is generally able and willing to use tools provided (e.g. portfolio templates) rules of cooperation established with the candidate	the candidate shares their experience the practitioner explains the TSC standards in depth and assist the candidate in using them the practitioner explains the tools for identifying TSC in depth and assists the candidate in using them the practitioner advises the candidate on possible additional training related to the TSC the practitioner advises the candidate on possible language courses (if needed)	the candidate produces evidence for possessing TSC the practitioner helps the candidate to decide whether to add TSC to their individual portfolio/profile/CV/job application or to document them separately the practitioner explains what evidence is and gives examples the practitioner assists the candidate in documenting their TSC the practitioner advises the candidate on the possible next steps corresponding with their TSC - seeking employment, negotiating with current employer, undertaking assessment etc.	the candidate decides on the concrete actions they want to take the practitioner prepares the candidate to present their TSC to the current or potential employers, e.g. when talking to their manager, during job interviews the practitioner assists the candidate in looking for employment according to their TSC and empowers the candidate to carry it out further on their own the practitioner contacts potential employers, relevant services or assessment providers (if needed) the practitioner assists in organising additional training related to TSC or language courses (if needed)
FRONTSTAGE CHANNELS	N/A	individual session, group session or hybrid email or chat phone lessons or group projects for students	individual session, group session or hybrid lessons or group projects for students	individual session, group session or hybrid lessons or group projects for students	individual session, group session or hybrid email or chat cloud storage digital portfolio	individual session, group session or hybrid email or chat phone
FRONTSTAGE TOOLS	N/A	rules of cooperation G/V provider website candidate success stories lesson plan in TSC for schools	rules of cooperation lesson plan on TSC for schools	TSC framework other TSC standards narrative tools psychological tests self-assessment tools EQF-based tools methodological guidelines	TSC framework other TSC standards digital portfolio portfolio template qualification database EQF-based tools	job offer databases relevant services website list assessment providers website list
BACKSTAGE PROCESSES / TOOLS	training programme available for the practitioners training programme available for school teachers practitioner competency profile	the candidate is formally registered channels of communication set up and decided on with the candidate tools available online and/or offline	channels of communication and online tools consistently available	channels of communication and online tools consistently available relations with training providers established	channels of communication and online tools consistently available availability of assessment and certification identified assessment provider contacted (if applicable)	further contact and feedback decided on with the candidate relations with employers and relevant services established relations with assessment providers established, mutual feedback provided (if applicable)

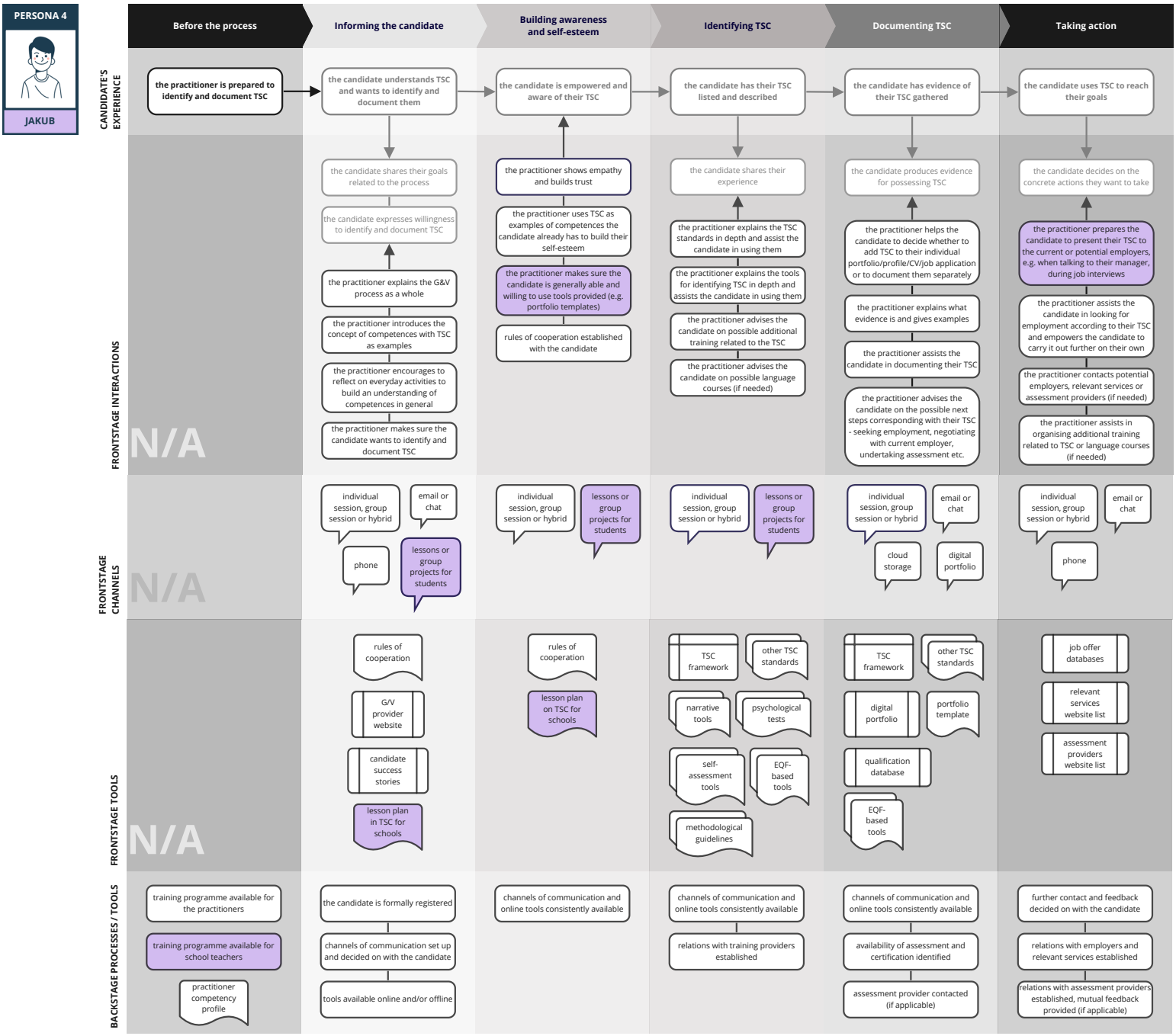
Guidance and validation scenario for transversal competences

Provisions particularly important for Persona 3



Guidance and validation scenario for transversal competences

Provisions particularly important for Persona 4



Guidance and validation scenario for transversal competences

Provisions particularly important for Persona 5