Valorisation Approach and Report

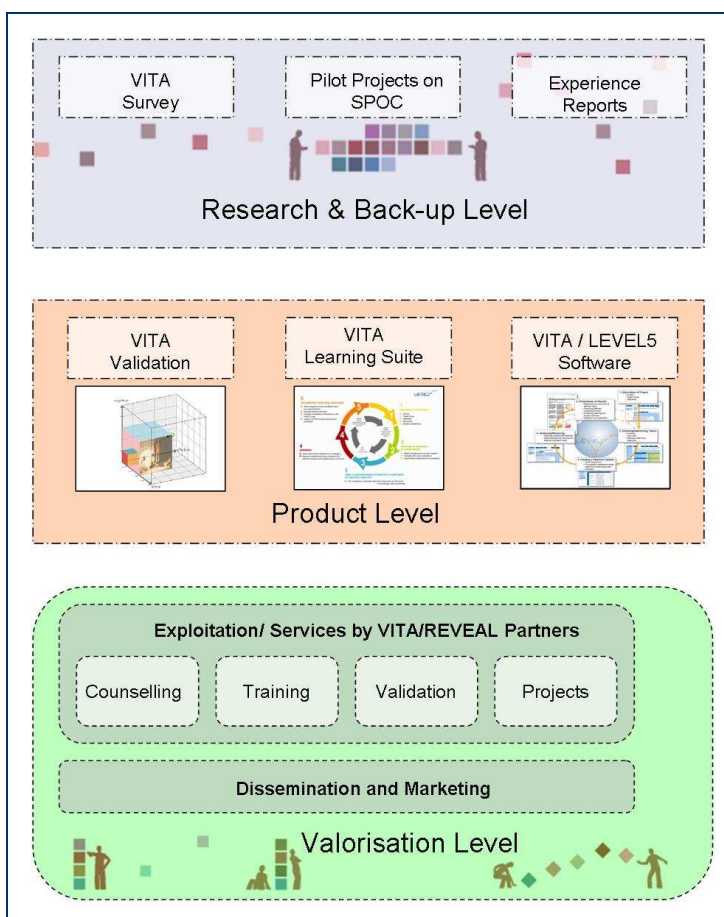Research & Back-up Level
- VITA Survey
- Pilot Projects on SPOC
- Experience Reports

Product Level
- VITA Validation
- VITA Learning Suite
- VITA / LEVEL5 Software

Valorisation Level

Exploitation/ Services by VITA/REVEAL Partners
- Counselling
- Training
- Validation
- Projects

Dissemination and Marketing

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1 Valorisation Strategy

Valorisation is a relatively new strategy to disseminate the results of projects[1]. It is aiming at transferring, disseminating and exploiting project deliverables and outputs in order to optimise their value and enhance their impact.

Output Levels
The outputs can be clustered in
- Project deliverables from the stock-taking and market research
- Central products that form the "kernel" of the project outputs and
- Envisaged valorisation outputs (exploited and disseminated project outputs).

Figure   1:   VITA Valorisation chart

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[1] Originally a French term, the concept of valorisation is now widely accepted by the European vocational training community. "Valorisation" can be described as the process of disseminating and exploiting projects outcomes with a view to optimising their value, enhancing their impact and integrating them into training systems and practices at local/national as well as on European level. (http://europa.eu.int/comm/education/programmes/leonardo/new/valorisation/doc/planval_en.pdf).

The comprehensive evaluation system to assess and evidence learning outcomes (in European projects and partnerships) is the *kernel* of the VITA -project (the core product).

It consists of three elements:

- A standardised validation procedure with description and pre-formatted instruments, based on the LEVEL5 approach,
- A holistic learning system, the VITA learning suite
- A perfected evaluation software to evidence evaluation results and document the micro-project and the procedure (LEVEL5 Approach).

The first project phase the activities in WPs 1, 2, 3 and 5 contributed to the development of the approach, its instrument and its marketing and dissemination:

- Definitions and explanations on validation, service oriented competences and their acquisition and promotion in the different educational sectors and available IT based approaches
- Development of the VITA validation system and its manual
- Development of a new version of the LEVEL5 software under consideration of different user needs and state of the art software requirements
- Development and delivery of a training course on the LEVEL5 methodology

Valorisation is a rather strategic concept to achieve a high impact of projects and to.

In VITA valorisation bundles the activities of:

- Exploitation outcomes and products through services rendered by VITA/REVEAL partners:
  - Counselling,
  - Training,
  - Validation and
  - Development of and participation in new practice-science projects basing on the VITA approach, as well as
- Dissemination and marketing of products and procedures.

In June 2012 during the VITA conference a workgroup developed a basic strategic draft on the composition and the organisational structure of the REVEAL network. In the following months a team of VITA partners from DE, AT, HE and GR further substantiated the approach and described services, learning environments and organisational structure in order to prepare a decision basis for future VITA/REVEAL partners in Europe.

Before turning to the valorisation activities carried out in the framework of VITA and the related projects, the main products shall be described from a user-oriented valorisation view.

The central element of VITA in the framework of REVEAL is the approach to evidence learning outcomes and the development of social, personal and organisational competences relevant in the service economy. Thus, the valorisation (exploitation) is focused on this central outcome. The value proposition for potential customers but also for VITA partners as suppliers is intrinsically tied to this key product.

The valorisation of the procedure has been a challenge as it related to an abstract and rather complex matter. In contrast to concrete products, the illustration of the value of a procedure either needs a lot of descriptions and argumentations or an elaborated visualisation concept to reduce complexity. This is why the project team illustrated the main outputs with the help of symbols, charts and visual metaphors right from the beginning.

In the framework of the valorisation two new brands have been developed to mainstream the approach and to set up an organisational basis (umbrella organisation) for the present and future partners taking part in the community.

In 2010 the developers' community decided to call the approach and the software "LEVEL5". The group of evaluators and experts that evaluate and validate along the LEVEL5 procedure and instruments will be called REVEAL (Abbreviation for Research and Evaluation Group for Validating, Evidencing and Assessing Informal and Non-Formal Learning).

In the framework of VITA the two brands have been protected and introduced in the European register of trade marks.

REVEAL as network shall become the organisational home of the VITA partners and the basis for an enlargement and dissemination and exploitation of the VITA approach to validate SPOC.

2 REVEAL Network

2.1 Introduction

REVEAL is the acronym for:

Research and Evaluation group for Validation, Evidencing and Assessing of informal and non-formal Learning

REVEAL - Research and Evaluation group for Validation, Evidencing and Assessing of informal and non-formal Learning.

REVEAL is a transnational community of European experts and practitioners working in 23 organisations from 18 European member states.

In the framework of three EU-funded projects our community has been developing a unique validation approach ("LEVEL5") for informal and non-formal learning between 2005 and 2011

The approach, titled has been piloted and applied in more than 50 learning projects and scientifically evaluated in the framework of two international PhD thesis.

It has been created to serve especially

- target groups that learn outside formal education contexts and
- their learning facilitators, be it adult learning providers, care organisations, grassroot projects and others.

2.2 Rationale

"Informal learning is a natural accompaniment to everyday life. Unlike formal and non-formal learning, informal learning is not necessarily intentional learning, and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills." European Commission (2000).

Informal and non-formal learning is not only delivered by main-stream educational providers. All kind of social organisations and self organised entities may also deal with "informal learning" – and may not even be aware of it.

Thus informal and non-formal learning is a rather ambivalent topic: On the one hand it is highly recognised by educational experts but on the other hand there is not much consciousness about the value in the field and – as consequence – there are relatively few and rather scattered approaches to give evidence of this important modality/way of learning.

This is the reason why "Validating of informal and non-formal learning" is currently one of the top priorities on the educational agenda of the European Commission.

However there are major systematic obstacles to a validation of informal and non-formal learning since the uncountable variety of learning contexts; contents and the lack of specified learning objectives are limiting a standardised evaluation.

One should also keep in mind that the goals of educational administration and funding bodies in regard to a validation of informal and non-formal learning (->standards) do not necessarily match with those of the experts working in the field, e.g. in grass-root projects (->individualism).

These fundamental target conflicts have to be considered when evaluating "informal and non-formal learning" especially in order to secure that it may serve those target groups that are already disadvantaged in the formal education system.

2.3 Vision

The core partner team gathered during the final conference of the first REVEAL-project ACT! in December 2007 founding the idea of a transnational network of experts from research and practice to create substantial contributions to the "Validation of Non-Formal and Informal Learning".

Against the background that especially the adult or lifelong learning community should profit from these learning modalities we unite behind the following principles:

- Non-formal and informal learning should gain more attention in the European learning community
- It should be recognised on an individual and purely voluntary level
- It should reflect the living and learning contexts of the individuals
- It should ground on action research principles and include all stakeholders (experts from the field, the learners) in the evaluation process
- It should not only evaluate learning following a utilitarian approach, e.g. against the principle of employability; but should also recognise a free learning which is not directed to specific job-related competences.
- In the first place the validation of IL shall support the individual by highlighting the developed competences to raise motivation to learn in informal learning contexts.
- It shall also contribute to a recognition of good informal learning practice in terms of learning outcomes to motivate learning providers to increase their efforts to create good informal learning offers.

2.4 Mission

2.5 Approach

REVEAL offers a system for evaluation and evidencing of learning outcomes with the help of a well developed, unique approach that has been scientifically approved and applied in a large scope of learning projects in non-formal and informal contexts.

The specifically created LEVEL5-software that is incorporated in REVEAL facilitates the comprehensive documentation and visualisation of learners' competence developments in all kinds of learning arrangements

The REVEAL evaluation procedure is on the one hand standardised and enables at the same time grass-root projects to establish an individualised reference system for assessing and evidencing relevant competence of their beneficiaries in a process-orientated way.

It also allows the learning providers to evidence the impact of their work according to a standardised procedure while, at the same time, keeping up the specifications of their informal learning projects in their individual contexts.

2.6 Networking and community building

REVEAL will contribute to the general goals by providing a stable European wide structure for support of learners and learning facilitators be it teachers, trainers, helpers, counsellors, accompanying persons, assessors, evaluators etc.

In this connection it will create a European wide community of experts providing help and guidance for stakeholders in the field (e.g. citizens' communities, grass-root projects but also providers of extracurricular activities etc.).

The composition of the REVEAL network reflects the idea of a mutual cooperation:

Executive members are being invited according to their specific expertise, to their area of work and to their geographical location. They take over commonly defined tasks in REVEAL.

Community partners may join the network on basis of their informal learning projects and use the services offered by REVEAL.

3 Services offered by REVEAL

3.1 Description

REVEAL consists of European members and member organisations who are accredited evaluators and multipliers for LEVEL5. They show profound expertise in approach, methodology, instruments and quality assurance in regard to the system.

On the basis of more than 50 evaluated micro projects we came to the conclusion that the process of informal learning evaluation is much too important to leave it just as a documentation output.

It affords a lot of different skills, competences and experiences to learn and profit from this approach in order to find out what really matters, which components to be highlighted, how the competence development of the individuals can be made visible and how the impact of the learning can be evidenced and improved.

This is why REVEAL offers support for providers of informal learning in the following domains:

A   Evaluation of learners
- Validation of SPOC for the service economy
- Self evaluation of learners
- Peer-evaluation of learners' competence developments with LEVEL5 (by using the LEVEL5 software, quality assurance by REVEAL-evaluators; Internal certification)
- External evaluation by accredited REVEAL evaluators

B   Evaluation of projects
- Validation of non-formal and informal learning projects (labelling and accreditation of learning projects)
- Evaluation of competence development in European projects
- Validation of European Mobility Actions and Projects)

C   Planning of Informal learning
- Development of regional informal and non-formal learning projects
- Development and collaboration in European funding project proposals

D   Networking and Support
- Counselling (in-house, help-desk, online-Conferences)
- Training (regional and European seminars (funding possible)
- Networking (informal LEVEL5 community)
- Knowledge base for informal learning (literature database)
- Informal learning planning patterns (WIKI)

3.2 Scenarios of Services offered by the REVEAL group

3.3 Introduction

The six scenarios presented below are invented to describe the possible services provided by the REVEAL group. In contrast to the "products" they are not tangible offers for potential clients but the paid support activities planned and delivered by the REVEAL members.

However it is useful to cluster those services in order to create a common understanding about the scope and potential of LEVEL5 applications and the different properties and characteristics.

The service scenarios are also basic help constructions to develop an idea of the income potential of LEVEL5 and the services connected with it for the member organisations.
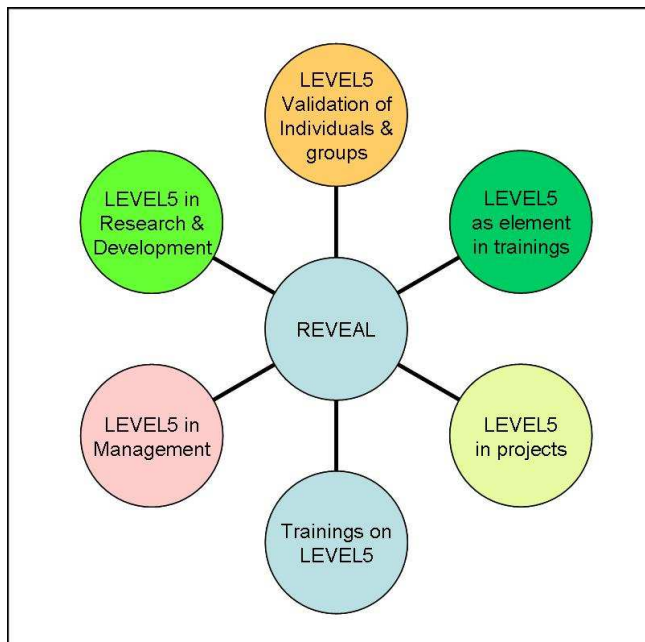

Fig. 1: 6 service scenarios of REVEAL connected with LEVEL5

It should be noted that these clusters are no discrete categories but necessarily partly overlapping.
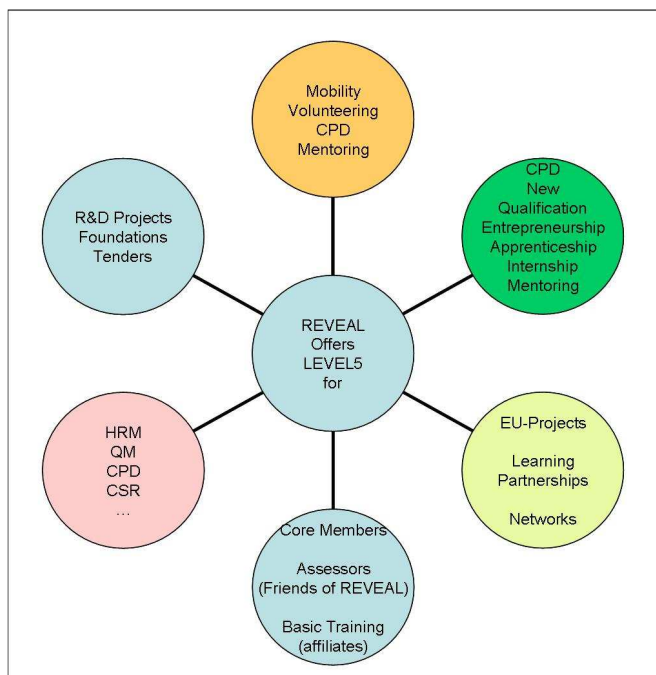
Fig. 2: Fields of application of the 6 service scenarios

As figure 2 shows the service scenarios relate to different "fields of application":

1. Scenario 1 relates to validation of learning of an individual or a group (e.g. the Erasmus-student, the individual learner who seeks to enlarge his/her competences while learning on the job or the disadvantaged youth who acquires new competences in an organised mobility learning; = LEVEL5 validation of individuals and groups.
Clients = individuals and related stakeholders (e.g. universities, training providers)

2. In scenario 2 LEVEL5 is applied as component of an informal or non-formal learning programme create new or to enlarge qualifications (e.g. in further education or continuing professional development) or as a competence based learning event (e.g. for young entrepreneurs as part of a mentoring programme).
Clients: = Training providers in VET, AE or HE, consultants, internal responsible persons for HR, team leaders…

3. Scenario 3 is focusing on EU-projects, partnerships or networks. It is based on the "VIP"-scheme that may well be extended to all other EU-programmes, e.g. also environmental, scientific (FP), interregional or other projects.
Clients = project personnel, EU projects

4. Courses on LEVEL5 are the subject of the 4th scenario (for different REVEAL clients, affiliates and members)
Clients = potential partners and affiliates

5. In scenario 5 LEVEL5 is used component of professional management systems with a focus on Human Resource Management but also on other systematic management and development strands like change management, quality management, corporate social responsibility (CSR)n or environmental management. - Clients: = Enterprises, or HRM-consultants

6. Last but not least Scenario 6 relates to the R&D sector or REVEAL, the generation and development and delivery of joint European research and development projects in the field.
Clients: = REVEAL Partners
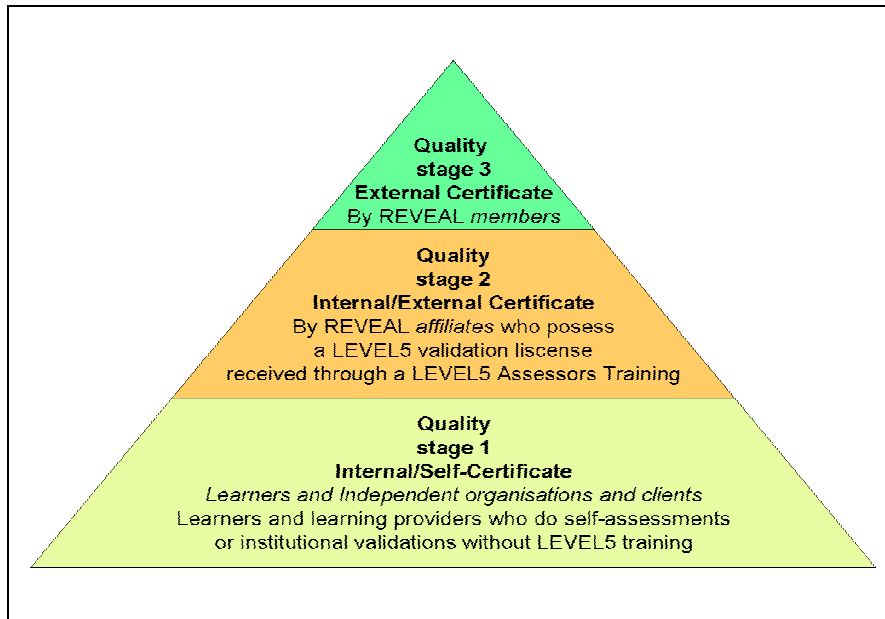
3.4 Excurse: Certification Stages of LEVEL5

Fig 3: Certification stages of LEVEL5

Self-assessment without counselling	-> Certificate stage 1
Basic counselling and quality check	-> Certificate stage 2
Fully fledged REVEAL counselling/development	-> Certificate stage 3

In the following the 6 scenarios will be briefly described and, where necessary und meaningful, sub-divided.

3.5 Validation of Individuals and Groups with LEVEL5

Self-/peer-assessment of individuals or groups (C1)
- self-assessment without counselling ->Certificate stage 1
- Example:
    - Individual: Self Assessment of students and mobility learners
    - Group: self-assessment of a group of volunteers
- Service: No service, just access of learners in software
- Product: Learning suite "volunteering", "Mobility learning" etc.

Self-/peer-assessment of individuals or groups plus basic external quality check (C2, FoR[2])
- basic counselling offers -> Certificate stage 2
- Example:
    - Individual: Self Assessment of learners on the job
    - Group: self-assessment of a young entrepreneurs
- Service: basic quality check by a LEVEL5 assessor (FoR)

External validating of individuals or groups by REVEAL(C3)
- fully fledged REVEAL counselling offer -> Certificate stage 3
- Example: Integrating LEVEL5 in a non-formal training of an external course provider or trainer, learning on the job, LEVEL5 in projects, HRM
    - Individual: External coaching in CPD

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[2] Friends or REVEAL, affiliate state

- Group: Group coaching in CPD, specific inhouse courses
(interface to II)
- Services: concept development, assessing and documentation of REVEAL
core partners

3.6 LEVEL5 as Element in Training and Learning Courses

1. **Embedding LEVEL5 in a formal qualification**
   a. V1 in an existing qualification
   - fully fledged REVEAL counselling offer -> Certificate stage 3
   - Example: Integrating LEVEL5 in a training of an external course
provider/institute/University/Chamber of Commerce
   - Services: Integration concept, entry validation, assessing and documentation

   b. V2: Developing a new qualification
   - fully fledged REVEAL counselling offer -> Certificate stage 3
   - Example: Integrating LEVEL5 in a new training of the REVEAL partner or joint
development an external course provider /institute / University / Chamber of
Commerce; (e.g. new IT-job profiles or HRM for work councils),
   - Services: Course development, integration concept, entry validation
(profiling), assessing and documentation

2. **LEVEL5 in Non-formal Courses and Trainings**
   c. Version 1 in an existing courses
   - Basic or fully fledged REVEAL counselling offer -> Certificate stage 2/3 or
accredited trainer/partner institute
   - Example: Integrating LEVEL5 in a training of an external course
provider/institute/University/Chamber of Commerce
   - Services:
     i. Integration concept, entry validation, assessing and documentation
(C3)
     ii. Training the partner staff, Quality check of the training (C2)
   d. Version 2: Developing a new course
   - Basic or fully fledged REVEAL counselling offer -> Certificate stage 2/3 or
accredited trainer/partner institute
   - Example: Integrating LEVEL5 in a new training of the REVEAL partner or joint
development an external course provider /institute
   - Services:
     i. Integration concept, entry validation, assessing and documentation
(C3)
     ii. Training the partner staff, Quality check of the training (C2)
   - Variation: Developing specific transferable courses (e.g.

3. **Competence based learning with LEVEL5 (informal learning offers)**
   - "LEVEL5 offers new ways of learning"
   - Basic or fully fledged REVEAL counselling offer -> Certificate stage 2/3 or
accredited trainer/partner institute
   - Example: Designing an competence based learning action with LEVEL5 in an
informal learning context, e.g. in leisure time or at the workplace, during
entrepreneurship learning projects, volunteering or active citizenship projects
   - Services:
     i. Learning concept development, coaching and/or accompanying the
learning, assessing and documentation (C2 or C3)
     ii. Training the partner staff, Quality check of the CBL-action (C2)
   - Variation: Developing specific transferable modules (e.g. client orientation)

3.7 LEVEL5 Validation in EU-projects

(LLP extension to FP7, INTERREG and other programmes)

1. Project team evaluation
- Basic or fully fledged counselling offer
  -> Certificate stage 2 or 3 by FoR or REVEAL partner
- Example: Designing an blended evaluation concept including a 2 day seminar for project leaders/partners
- Services:
  i. Evaluation concept/aims, reference system refinement, assessment method, quality check, certificate stage 2/3
  ii. Training of project partners, external (process and competence development evaluation)

2. Project partner evaluation
- Basic or fully fledged counselling offer
  -> Certificate stages 1, 2 or 3 by FoR or REVEAL partner
- Example: Validating of PM competences of a manager or a partner
- Services:
  - PM-learning suite (self assessment)
  - Basic q-check (FoR)
  - Fully fledged evaluation (C3, REVEAL core members)
  - Evaluation concept/aims, reference system refinement, assessment method, quality check, certificate stage 2/3
  - Training of project partners, external (process and competence development evaluation)

3.8 Trainings on LEVEL5

1. **LEVEL5 Assessors training**
   - (LEVEL5 assessor -> assessment license, permits to assess and certify stage 2)
2. **REVEAL Validation Professionals' training**
   - (REVEAL validator -> validation license, stage 3, necessary to get core member status)
3. **Theme oriented courses**
   - GRU EU-course for course providers
   - Mobility learning providers
   - Volunteering providers
   - (all on LEVEL5 assessor level -> assessment license, stage 2)
   - Others:
     - Project managers and partners
     - Network managers and partners

4. **LEVEL5 as part of courses on validation and evaluation**
   - Combination with SEALLL
   - Combination with GINCO
   - Combination with validation courses
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5. **Holistic LEVEL5 Competence Based Learning (CBL) approach**
   - Basic training: CBL inclusion in trainings (1-2 days)
   - Informal learning instructor (1-2 days)
   - Trainings for educational professionals
   - GRU EU-course

3.9 LEVEL5 in Management Consulting[3]

SPOC play an important role in Human Resource Management (HRM). This applies on the one hand when new staff members enter the enterprise or organisation, be it as new appointed personnel, but also as interns or apprentices. On the other hand also the continuing professional development is of major importance especially against the background of demographic change and rapidly changing demands at the workplace. It goes without saying that "learning on the job" is one of the major context of informal learning and for the acquisition of SPOC.

Different relevant domains of management consulting shall be briefly described:

🔳 HR Management

Purpose	• Supporting HR departments in developing and monitoring personnel development plans
Activities	• Introductory sessions with HR people • Integrating LEVEL5 in personnel development plans (Competence Based learning) • Coaching, consulting HR people in applying given or developing new reference systems • Coaching learners (individually and/or training personnel in groups • Assessing and rating • Documenting and planning • Next round, if possible integrating in QM
LEVEL5 input	• CBL method • Competence development visualisation • Personal management system • Certification
Competences	• Team competences, communication, ….
Outcomes, added value (Reasons to take LEVEL5)	• Motivation of employees increases • Visibility of competence profiles increases • Management of Competences possible • External image (attractiveness) improves • Possible link with QM
Variations	• Fully fledged system for the whole organisation -> *LEVEL5 Competence Management System* • External system for the employees (portfolio) • New competences for specific sectors • Learning systems for apprentices, interns, novices • Embedded in regional ESF projects
Partners	• Elisabeth (?), Holger & team, BUPNET
Development concept	• Concept description (PDCA) • Inventory of competences • Reference systems • Training and learning methodology (Coaching) • Assessment methods (additional) • Pilot projects (application in practice on existing reference systems)
REVEAL member benefit	• Transfer of standardised patterns to REVEAL members (possibility to franchise) • Common Reference projects • Cross marketing

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[3] To be further substantiated after a first feed-back and discussion

Lifelong Learning

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■■ Quality Management

Purpose	• Supporting educational institutions in a quality assurance and –management approach
Activities	• Introductory sessions with educational and administrative staff • Integrating LEVEL5 in quality management (Competence Based learning) • Coaching, consulting educational professionals in the LEVEL5 approach • Coaching while assessing and rating • Documenting and further planning •
LEVEL5 input	• CBL method • Competence development visualisation • Personal management system as module for QM • "Certification " (or better evidencing the competence developments of groups and individuals
Competences	• QM system to validate the impact of the learning offer
Outcomes, added value (Reasons to take LEVEL5)	• QM module for educational institutions based on competence development as core output • Management of Competences possible • External image (attractiveness) improves • Possible link with QM
Variations	• Transfer to other sectors • Can be sold as QM-Module for HRM • Can be connected to environmental management
Partners	• Tim, Guy,
Development concept	• Concept description (PDCA) • Inventory of competences • Reference systems • Training and learning methodology (Coaching) • Assessment methods (additional) • Pilot projects (application in practice on existing reference systems)
REVEAL member benefit	• Transfer of standardised patterns to REVEAL members (possibility to franchise) • Common Reference projects • Cross marketing

Project Management

Purpose	• Supporting project managers while executing a project • Supporting project partners in cooperation • Supporting project teams in developing actions
Activities	• Introductory sessions with project management and partners • Integrating LEVEL5 in project management (VIP) • Coaching in applying the LEVEL5 approach (selecting competences, reference systems) • Coaching while internal assessment • Documenting.. • … • The whole approach can be offered as a project evaluation!!!
LEVEL5 input	• Set of topics and competences (VIP) • Competence development visualisation • Personal management system as module for QM • "Certification " (or better evidencing the competence developments of groups and individuals • Training input (PM units on an LMS available)
Competences	• PM • Teamwork • Virtual communication • The VIP competences
Outcomes, added value (Reasons to take LEVEL5)	• Motivational aspects (of partners) • Combined development and learning action • Inclusion of competences in personal e-portfolios • Introducing a PM as an internal management system (TAL-circle) • Possible link with QM
Variations	• Only assessment/evaluation approach • Holistic learning approach (see also learning suite on EU-projects) • Validation of an Individual PM • Asynchronous online materials available • Maybe this offer can be included in a training course
Partners	• Tim, Holger
Development concept	• Concept description • Inventory of competences • Reference systems • Training and learning methodology (Blended learning/Coaching/e-learning) • Evaluation • Pilot projects (application in practice on existing reference systems)
REVEAL member benefit	• Transfer of standardised patterns to REVEAL members (possibility to franchise) • Applying for external evaluations • Broadening the scope to projects in other programmes • Common reference projects • Cross marketing

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VITA

Lifelong Learning

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⬛ Network Management

Purpose	• Supporting managers while running a network • Supporting project partners in cooperation • Supporting project teams in developing actions
Activities	• Introductory sessions with network management and partners • Integrating LEVEL5 in network management (VIP) • Coaching in applying the LEVEL5 approach (selecting competences, reference systems) • Coaching while internal assessment • Documenting.. • … • The whole approach can be offered as a network evaluation!!!
LEVEL5 input	• Set of topics and competences (VIP) • Competence development visualisation • Personal management system as module for QM • "Certification " (or better evidencing the competence developments of groups and individuals • Training input (PM units on an LMS available)
Competences	• Networking • Teamwork • Virtual communication • other VIP competences • ….
Outcomes, added value (Reasons to take LEVEL5)	• Motivational aspects (of partners) • Combined development and learning action • Inclusion of competences in personal e-portfolios • Introducing a NM as an internal management system (TAL-circle) • Possible link with QM
Variations	• Only assessment/evaluation approach • Holistic learning approach (see also learning suite on networking) • Validation of an individual networker • Asynchronous online materials available • … • Maybe this offer can be included in a training course
Partners	• Tim, Holger
Development concept	• Concept description • Inventory of competences • Reference systems • Training and learning methodology (Blended learning/Coaching/e-learning) • Evaluation • Pilot projects (application in practice on existing reference systems)
REVEAL member benefit	• Transfer of standardised patterns to REVEAL members (possibility to franchise) • Applying for external evaluations • Broadening the scope to networks in other programmes • Common reference projects • Cross marketing

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Other Domains

- Change management
- CSR
- Environmental management

4 Product Development
4.1 LEVEL5-learning suites

A LEVEL5 learning suite is a comprehensive learning tool-kit that facilitates not only the validation of competence developments in informal learning but also supports the planning of not formalised learning.

A learning suite may focus on:

- Certain (professional or life related) activity areas and the related competences, e.g.:
    - Service economy and the related SPOC (VITA)
    - Teaching competences for continuing professional development of educational staff
    - Active citizenship competences
    - Entrepreneurship learning
    - Creative learning
    -

or

- Certain informal learning *contexts*, for instance:
    - Mobility learning,
    - Learning while volunteering,
    - Learning in an internship or apprenticeship
    - Learning in European projects
    - etc.

These learning environments differ in context, learners' groups, objectives, contents and resources – hence consequently also the reference systems, assessment methods and possible learning patters will vary.

A learning suite consists of the following elements

- Introduction to the field of activity and the related competences
- Introduction to LEVEL5
- Inventory of context related competences and related Reference Systems
- Inventory of assessment methods
- Guidelines to integrate LEVEL5 in related learning activity
- Inventory of Informal learning patterns

The VITA learning suite will be finalised in the second year of the VITA project after a reasonable amount of pilot projects in the different educational fields.

Other projects and network partners may add other learning suites in the aforementioned fields of activity and informal learning.

5   Value Proposition and Business Revenue Planning

Note: The following figures are, at the moment, very rough estimations. Especially the income part may largely vary in regard to the projects. It should be seen as a first approach that includes basic principles that we should further discuss and elaborate.

5.1   Basic principles

The idea of the REVEAL group is to create a "bottom-up network" of experts from science and practice that offer the aforementioned services to their target groups, be it learners, educational institutes, funding bodies etc.

REVEAL as such will only act as umbrella organisation on the European level in order to constantly further develop the approach (as from 2009-2012), to liaise with new partners and networks, to care for quality, to provide the software and the products (learning suites) and to care for IPR and intellectual property right issues such as protection of the two brands.

The proposed legal structure is a "cooperative" since it reflects best the common ideas and the joint development approach. REVEAL will be open both for natural and legal persons.

The developing team proposed two levels of REVEAL membership:

- REVEAL cooperative members, being responsible for the core developments
- "Friends of REVEAL" who are affiliates and who participate and share the benefits and products generated from the REVEAL network

5.1.1   REVEAL cooperative members:
Each full member may purchase a share (legal persons (organisations) have to buy 10 shares while natural persons may purchase one share. There will be also yearly membership fees. REVEAL cooperative members will meet according to the cooperative rules and status and decide on the business development of the cooperative.

5.1.2   Friends of REVEAL:
Each Friend of REVEAL will pay a reduced yearly membership fee and will not own shares. As such they are not entitled to decide on any development issues of REVEAL.

5.2   Business model:
The core of the business model is created by the LEVEL5 approach, the software and the related learning suites as holistic competence development and validation systems.

REVEAL was founded in order to promote the approach and to set up stable networking and marketing structures for the sake of its members.

The REVEAL members shall generate income with LEVEL5 by offering the aforementioned services exclusively in their member state, region and area of expertise.

Hence the *business model for the REVEAL-network* is basically grounded on membership fees and a share for each learner who is validated with the LEVEL5 approach and uses the software services. In the basic business plan the REVEAL fees per learner's certificate (evidence) vary according to the sector and the financial capacity between 10 and 50€.

The business model for the REVEAL members is related to the services rendered by them.

There are basic calculations in regard to the aforementioned scenarios that correlate with the quality levels of the certificates and evidences.

A pure self evaluation of a student in an ERASMUS mobility does not afford any input from REVEAL members. If a fully fledged learning course on a specific theme is developed and delivered (e.g. a course on client orientation in a supermarket or a bank, the effort for the REVEAL member is high and the services may be charged in relation to the counselling or

training fee structure of the member state. REVEAL will not charge any franchising charges for these services – the REVEAL member is fully responsible for these training or counselling services. However a REVEAL central board will have a look on content and quality of the offer in order to guarantee the achieved quality an ethical value of the approach.

Hence the embedding of the LEVEL5 approach into the own services is a unique selling proposition for the REVEAL member organisation.

The joint approach, backed up with the cooperative structure creates a win-win situation for both REVEAL and its members: The more learners and projects will be trained and validated the higher the revenues for both the member and the cooperative.

5.2.1 Business Revenue Estimation

Income (estimated for 2014): Totalling to 65.000 €

- Owners and members (estimated 6.000 €)
  - Management of shares
  - Membership fees
  - 6 enterprises, 10 persons, 10 affiliates

- LEVEL5 learners' accounts (20.500€)
  - 25-50€ per learner in scenarios described above
  - Services provided by members
  - Estimated 400 learners in year 1

- LEVEL5 Trainings (16.000€)
  - 9 trainings all over Europe (EU und national/regional)
  - Estimated 400 learners in year 1

- LEVEL5 in HRM
  - 5.000€ to be generated in 2 HRM projects

- Products (Learning suites)
  - Products purchased by clients
  - Not taken into account

- Participation in Projects (7500 €)
  - Project evaluations

- Other sources (7.500€)
  - Other Evaluations
  - Communication services

Expenditures Totalling to 65.000 €

- Fixed Costs
  - (14.000)
  - Legal Cooperative issues, obligatory memberships
  - Tax bookkeeping
- Software maintenance
  - (27.000) either with own personnel or
  - Subcontracted
- Financial controlling/Bookkeeping/Administration

- (15.000)
- Maybe also to be subcontracted
- Controlling
- Member management
- Basic marketing work
- Resources for Partners
  - (9.000)
  - Marketing
  - Joint product development

Detailed income estimation year 1 after funding
(tables for each service scenario calculated in a separate xls-file)
(

Income sources for	REVEAL	%	Members	%
1a LEVEL5-Validation of Individuals				
1a.1.a Individual self/peer assessment (promotion: volunteers/mobility -> Q1)	1.800,00 €		200,00 €	
1a.1.b Individual self/peer assessment (advanced: volunteers/mobility -> Q1)	2.250,00 €		250,00 €	
1a.1.c Individual self/peer assessment (professionals -> Q1)	1.800,00 €		200,00 €	
1a.2.a Individual self/ext. Quality check by an accredited FoR (promotion: volunteers/mobility -> Q2)	2.500,00 €		3.000,00 €	
1a.2.b Individual self/ext. Quality check by an accredited FoR (advanced: volunteers/mobility -> Q2)	1.500,00 €		2.000,00 €	
1a.2.c Individual self/ext. Quality check by an accredited FoR (professionals -> Q2)	1.800,00 €		3.300,00 €	
1a.3 Individual coaching for professional purposes -> Q3	1.000,00 €		5.200,00 €	
	12.650,00 €	**21,9%**	**14.150,00 €**	**11,2%**
1b LEVEL5-Validation in groups				
1.b.1. Individual group assessment (advanced: volunteers/mobility -> Q1)	2.250,00 €		250,00 €	
1.b.2 Individual group assessment, basic quality check by an accredited FoR (professionals -> Q2)	3.750,00 €		2.600,00 €	
1.b.3 External assessments/Individual coaching for professional purposes -> Q3	2.000,00 €		3.430,00 €	
	8.000,00 €	**13,9%**	**6.280,00 €**	**5,0%**
2 LEVEL5 in Training and Qualification				
Introducing LEVEL5 in an existing qualification	1.000,00 €		17.920,00 €	
Developing a new qualification based on CBL with LEVEL5	500,00 €		11.200,00 €	
	1.500,00 €	**2,6%**	**29.120,00 €**	**23,0%**
3 LEVEL5 in projects				
3.1 Evaluation of competence development in European projects	**7.500,00 €**	**13,0%**	**15.600,00 €**	**12,3%**
4 Courses & trainings on LEVEL5				
4.1 Grundtvig courses by REVEAL partners	2.000,00 €		10.000,00 €	
4.2 Trainings of assessors and embedded trainings (regional and European seminars (evtl. funded)	14.000,00 €		35.500,00 €	
	16.000,00 €	**27,8%**	**45.500,00 €**	**35,9%**
5 LEVEL5 in HRM				
5.1 Evaluation of competence development in an Enterprise/organisation	**5.000,00 €**	**8,7%**	**16.000,00 €**	**12,6%**
6 Membership				
Organisations	3.500,00 €			
persons	2.500,00 €			
Friends of REVEAL	1.000,00 €			
	7.000,00 €	**12,1%**	**- €**	**0,0%**
Total	**57.650,00 €**		**126.650,00 €**	

6 Organisational development

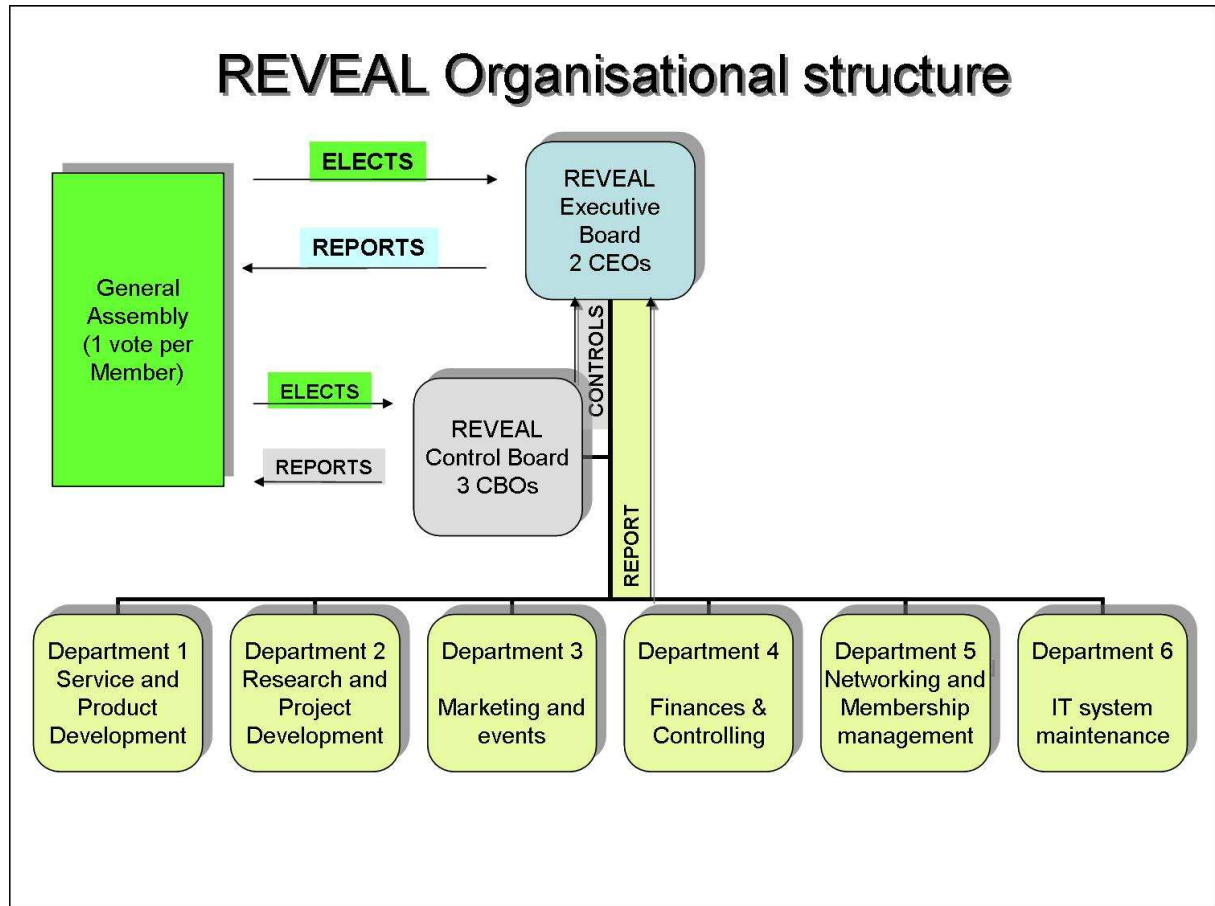## REVEAL Organisational structure/departments

Fig 4: Organisational structure of REVEAL

The structure of REVEAL reflects on the one hand the legal requirements given by German cooperative law and on the other hand the spirit of the joint European collaboration:

The ultimate decisive unit is the GA (General Assembly) in which each member has one vote. It elects both the Executive board (as operative organ) and the control board which controls the 2 CEOs of the executive board. The assembly will meet at least once in a year or, after invitation or apply by one member in more frequent times.

Specific tasks and vital network issues will be organised in so called departments, led by one REVEAL expert member. The vital areas identified so far are:

- Service and product development
- R&D
- Marketing and events
- Finances and Controlling
- Networking and Membership Management
- IT system and Maintenance.

7 Annexes
7.1 Annex 1: Draft Statutes

STATUTES OF THE REVEAL COOPERATIVE

§ 1 Name, Domicile, and Purpose

(1)   The cooperative is called REVEAL eG, located in Göttingen, Germany.

(2)   The cooperative's purpose is the promotion of its members by means of collaborative business activities.
REVEAL eG serves the promotion of learning, education and training in informal and non-formal contexts in Europe. The cooperative promotes the quality of work and the economic activities of its members when using innovative learning, training, evaluation and validation methods in general and particularly via its LEVEL5 methodology.

(3)   REVEAL is a community of individuals and related organisations
- promoting the innovative concepts of informal and non-formal learning and validation of informally acquired competences among practitioners and decision-makers in lifelong learning at local, national and European level.
- providing evaluation services and consultancy on validation of competence development in informal and non-formal learning settings on the basis of the LEVEL5 system
- developing and implementing research and development and educational projects related to informal learning and validation of informally acquired competences
- providing training and certification for individuals and institutions interested in applying LEVEL5 and other methods of validation of informally acquired competences
- REVEAL offers the exclusive organisational framework for its members to offer LEVEL5 services to clients while protecting the trademark LEVEL5, ensuring uniform quality of LEVEL5 services and enabling further development and upgrading of the LEVEL5 software.

(3) The only exception to exclusivity is participation as a partner in publicly funded projects during the funding period.

(4) The cooperative is entitled to participate in other businesses.

(5) The accounting year is the calendrical year.

§ 2 Share in the Cooperative, Payments, Reserves, Subsequent Payments, Refunds, Prescription

(1) One share in the cooperative amounts to 50 Euro. It has to be paid in full instantly.

(2) REVEAL members may take up to 100 shares of the cooperative. Natural persons have to take at least one share in the cooperative, organisations are required to take at least ten shares.

(3) The administrative admission fee is 50 Euro.

(4) The compulsory reserve is at least 20% of the annual net profit up to 100% of the sum of the share in the company.

(5) REVEAL members are subject to a subsequent yearly membership fee of
- 100 € for natural persons
- 500 € for organisations

§ 3 Acquisition of Membership

(1) Membership is effected through application with the REVEAL Management Board. In this context the applicant has to sign a compulsory statement, which has to conform to the requirements of the law.

(2) In order to guarantee the trustful and personal relation among the REVEAL members the membership of an organisation is always bound to the membership of a specific person as employee or entrepreneur. In case that this employee/owner of the member organisation withdraws from the REVEAL cooperative the status of the connected organisation will become subject of new membership negotiation. It can be continued by the appointment of a proxy who has to be accepted by the GA. Until a final decision of the board/the general assembly the organisation is not entitled to vote in the GA.

(3) The REVEAL Management Board decides about the admission of a new member and informs the other members of the cooperative at its homepage or via email.

(4) Unless a member of the cooperative objects to the admission of the new member to the REVEAL Management Board within 14 days the application is accepted.

(5) In case of an objection, the next due general meeting decides by simple majority vote.

(6) Each REVEAL member has a veto right with regard to admission of another member of the same country of origin

(6) Membership starts with the date of the written confirmation of the admission to the cooperative, § 3 (3) remains untouched.

§ 4 Rights and Duties Implied by Membership

(1) REVEAL Members commit themselves to
-   offering services to clients as described in § 1
-   developing a yearly business and marketing plan and informing the REVEAL Management Board of it

- ensuring that services to clients based on LEVEL5 are exclusively provided by individuals who have successfully completed LEVEL5 Assessors Training and been certified by the REVEAL cooperative
- protecting the labels REVEAL and LEVEL5 against third parties

(2) REVEAL Members are entitled to
- use the name logo and visual identity of REVEAL and LEVEL5 in their activities
- provide commercial services to clients as described in § 1 on the basis of fees defined by the respective REVEAL member according to the necessities of the markets they operate in
- provide these services exclusively in their country on the basis of a joint REVEAL development plan that also regulates the exclusivity issues in the countries
- access the LEVEL5 software for providing services to clients on the basis of an administration fee agreed on at the General Meeting

§ 5 Affiliation as Friends of REVEAL

(1) Apart from membership as described in §§ 2-4 the REVEAL cooperative offers a second and more limited type of involvement as affiliated Friend of REVEAL. Natural persons and organisations can become Friends of REVEAL.

(2) Affiliation as Friend of REVEAL can be obtained through application with the REVEAL Management Board. § (3) 1-6 applies for the admission procedure.

(3) There are no fees or other payments connected to the status of Friend of REVEAL.

(4) Friends of REVEAL are entitled to
- use the name logo and visual identity of REVEAL and LEVEL5
- apply LEVEL5 for validation activities within their own organisations
- access the LEVEL5 software for validation activities within their own organisations on the basis of an administration fee agreed on at the General Meeting
- receive regular information on the cooperative's activities
- participate in REVEAL events and networking activities free of charge or at special discount rates

§ 6 General Meeting

(1) The General Meeting has to be held once a year. It is called by means of direct notification of all members through mail, fax or email at least 14 days before the meeting. Addenda to and modifications of the agenda must be announced at the latest five days before the General Meeting.

(2) Every duly announced general meeting has the quorum irrespective of the number of REVEAL Members attending.

(3) Each REVEAL Member has one vote, irrespective of the number of shares in the cooperative acquired.

(4) Friends of REVEAL are invited to (parts of) the General Meeting, but have no right to vote.

(5) The REVEAL Management Board facilitates the meeting.

(6) Decisions will be recorded according to § 47 GenG (German Cooperative Law).

(7) The General Meeting elects the Chairperson and the members of the REVEAL Management Board.

(8) At the yearly General Assembly (GA) the REVEAL Management Board is obliged to give account how this income has been invested.

§ 7 REVEAL Management Board

(1) The REVEAL Management Board consists of two members elected by the General Meeting. The REVEAL Management Board can make decisions in written as well as electronic form.

(2) One member of the REVEAL Management Board acts as Chairperson. The other member of the REVEAL Management Board acts as deputy. Both Chairpersons are authorised to individually sign documents legally binding the REVEAL cooperative.

(2) The REVEAL Management Board needs the consent of the General Assembly for decisions with a value beyond 50.000 Euro. General consent can be given in advance for similar issues.

(3) Any property deals as well as hypothecations or pledges of the estate are only possible with the decision of the General Assembly.

§ 6 Supervisory Board (legally binding structure of a cooperative)

(1) The supervisory board consist of at least three members. The supervisory board always has an uneven number of members. It is represented by the chairman or his/her representative.

(2) The supervisory board has a quorum if at least half of the members take part in the resolution (decree). The supervisory board is entitled to make a decision in written or via email, if none of the members of the supervisory board disagrees with the decision.

(3) The supervisory board controls the management of the cooperative. In urgent circumstances the supervisory board appoints the members of the management until the next general meeting.

§ 7 Termination of Membership, Exclusion from the Cooperative, Partition

(1) The term of abrogation of membership is one year to the end of the business year.

(2) Members who harm the cooperative can be excluded by simple majority vote of the General Meeting.

(3) Members are obliged to update the cooperative on their current address. Members who cannot be reached may be expelled from the cooperative by simple majority vote of the General Meeting.

(5) In cases of credit balances of withdrawing partners' capital account accumulated losses are deducted pro rata.

§ 8 Publications

The publications of the cooperative take place in the nationwide newspaper „Frankfurter Allgemeine Zeitung" and in the local newspaper „Göttinger Tageblatt" (can be modified).

Location, date

7.2 Annex 2: IPR and Confidentiality

7.2.1 Publication and Confidentiality Issues related to REVEAL partners

1	Dissemination activities including but not restricted to publications and presentations shall be governed by subject to the following provisions. Prior notice of any planned publication shall be made 45 days before the publication. Any objection to the planned publication shall be made in accordance with the GA in writing to the Coordinator and to any Party concerned within 30 days after receipt of the notice. If no objection is made within the time limit stated above, the publication is permitted.
2	An objection is justified if (a) the objecting Party's legitimate academic or commercial interests are compromised by the publication; or (b) the protection of the objecting Party's Knowledge or Pre-existing know-how is adversely affected. The objection has to include a precise request for necessary modifications.
3	If an objection has been raised the involved Parties shall discuss how to overcome the justified grounds for the objection on a timely basis (for example by amendment to the planned publication and/or by protecting information before publication) and the objecting Party shall not unreasonably continue the opposition if appropriate actions are performed following the discussion.
4	Publication of another Party's Knowledge or Pre-existing know-how
	For the avoidance of doubt, a Party shall not publish Knowledge or Pre-existing know-how of another Party, even if such Knowledge or Pre-existing know-how is amalgamated with the Party's Knowledge, without the other Party's prior written approval. For the avoidance of doubt, the mere absence of an objection according to 6.3 is not considered as an approval.
5	Cooperation obligations
	The Parties undertake to cooperate to allow the timely submission, examination, publication and defence of any dissertation or thesis for a degree which includes their Knowledge or Pre-existing know-how. However, confidentiality and publication clauses have to be respected.
6	Use of names, logos or trademarks
	Nothing in this Memorandum shall be construed as conferring rights to use in advertising, publicity or otherwise the name of the Parties or any of their logos or trademarks without their prior written approval. All project public dissemination materials shall bear the logo of LEVEL5 and REVEAL and, if related to LLP projects, the acknowledgement of the Community support and the EU logo.
6	Use of the LEVEL5 approach and instruments
	If organisations or individuals use the LEVEL5 approach or its ventral instruments (inventory and reference systems) they are obliged to quote the REVEAL network and the LEVEL5 and link to the reveal-eu.org website. If the instruments are used in the VITA e-Portfolio the users are obliged to refer to the project and the website and link to the EU-funding.

7.2.2 Intellectual property rights

1	Joint ownership
	Each of the joint owners (REVEAL members) shall be entitled to Use their jointly owned knowledge on a basis of their services , and without requiring the prior consent of the other joint owner(s), and each of the joint owners shall be entitled to grant exclusive licenses to third parties, without any right to sub-license, subject to the following conditions: at least 45 days prior notice must be given to the other joint owner(s) who must declare if they agree; and fair and reasonable compensation must be provided to the other joint owner(s). In case third parties use the LEVEL5 software, the labels or other brands or products in property of the REVEAL cooperative those parties are considered as clients who pay for the access to the software and the respective evidences on the basis agreed by the REVEAL members in the "LEVEL5 access fee regulation".
2	Transfer of Own Knowledge (foreground)
2.1	Each Party may transfer ownership of its own Knowledge following the procedures of the Annex 2.
2.2	It may identify specific third parties it intends to transfer the ownership of its Knowledge to. The other Members hereby waive their right to object to a transfer to listed third parties.
2.3	The transferring Party shall, however, notify the other Parties of such transfer and shall ensure that the rights of the other Parties will not be affected by such transfer, especially when the LEVEL5 approach or a related instrument (3-dimeninsional, 5-level reference system) is used.