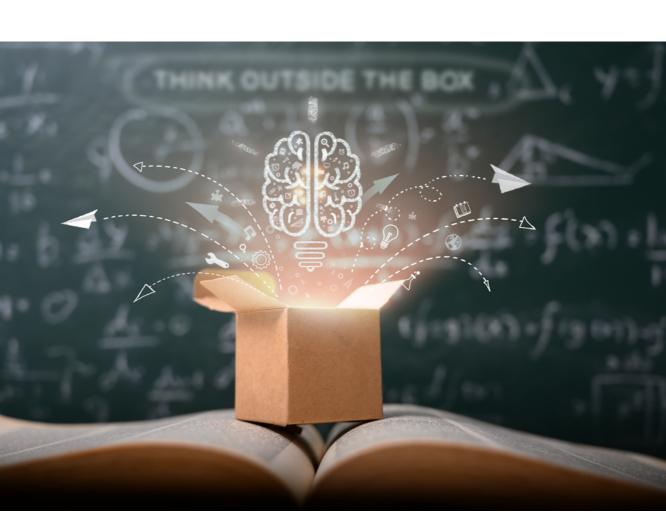# A METHODOLOGY FOR THE DEVELOPMENT OF REGIONALLY-BASED OCCUPATIONAL STANDARDS

defining guiding principles, steps and methods

A Methodology for the Development of Regionally-based Occupational Standards

defining guiding principles, steps and methods

Table of Contents

Introduction

Cooperation in South Eastern Europe in the area of Vocational Education and Training at the level of Vocational Education and Training government institutions was formalized back in 2011, when *Cooperation Agreement between Vocational Education and Training (VET) Institutions Acting in the SEECP[1] Region Aiming to Create the SEE Regional VET Network (SEEVET Net)* was signed among the VET institutions in charge of implementing VET policies from Albania, Bosnia and Herzegovina, Bulgaria, Republic of North Macedonia, Moldova, Montenegro, Romania and Serbia. The signing of the Agreement marked the establishment of the South East Europe Vocational Education and Training Network (SEEVET Net), the driving force of regional cooperation and modernization in the area of VET, focused on the development of VET qualifications, quality assurance in VET, VET as a part of the lifelong learning and social partnership enhancement in the VET sector. Education Reform Initiative of South Eastern Europe (ERI SEE)[2], based on previous longstanding cooperation with VET national institutions at regional level, was tasked to officially coordinate the functioning of the SEEVET Net and organize different formats of capacity building activities for its members.

With time, the SEEVET Net grew stronger and asked for the expansion and intensification of co-operation modes and number of activities. This coincided with the wider developments at the EU level, namely the initiation of the Berlin Process, an initiative aimed at stepping up regional cooperation in the Western Balkans and aiding the integration of these economies into the European Union. It was launched on August 28, 2014, by the German Chancellor Angela Merkel, and is taking place with support of the European Commission, international financial institutions and the Member States involved in the Process – Austria, Croatia, France, Germany, Italy, Slovenia and the United Kingdom. It is supplementary to the individual countries' institutional EU integration process, based on the adoption of the *acquis communautaire.[3]*

Within the framework of the Berlin process, in 2016, a conference *Building a Western Balkans Alliance for Work-based Learning[4]* was organized in Vienna, calling for a greater cooperation between the VET and business sector, and focusing on VET modernization, and work-based learning in particular. The conference marked the birth of the Western Balkans Alliance for Work-based Learning (WBA4WBL)[5], composed of representatives of VET government institutions (VET agencies) and private sector entities from Albania, Bosnia and Herzegovina, Kosovo*[6], Republic of North Macedonia, Montenegro and Serbia. On that occasion, ERI SEE and Western Balkans Chambers Investment Forum (WB CIF) were asked to explore options of how to build on the momentum, further strengthen the dialogue and enhance cooperation between the public and the private sectors in the region.[7]

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1 SEECP – South Eastern European Cooperation Process (SEECP) was initiated in 1996 at the meeting of the Ministers of Foreign Affairs of SEECP held in Sofia/Bulgaria. This regional cooperation forum aims at strengthening the good-neighbourly relations among all participants from South East Europe (SEE), and transforming this region into an area of peace, security, stability and cooperation, with the main goal of full integration of SEE into European and Euro-Atlantic structures. The Charter on Good-Neighbourly Relations, Stability, Security and Cooperation in SEE, adopted in Bucharest in 2000, represents the essential document of the SEECP (source: www.rcc.int).

2 www.erisee.org

3 www.berlinprocess.info

4 More about the conference can be found on: https://wbc-rti.info/object/news/15012

5 www.wba4wbl.com

6 *This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

7 Joint Statement endorsed by Participants of the Conference Building a Western Balkans Alliance for Work-based Learning, https://www.kulturkontakt.or.at/plattform/pdfview.asp?guid={0EF5AB9B-65E0-4E03-9992-BBB8D-999C68A}

Soon, other activities followed. In December 2016 the first working meeting of the WBA4WBL was organized, gathering the VET agencies and Chambers of commerce who agreed on the main objectives of future cooperation:

♦ Development or modernisation of joint standards of occupations and qualifications
♦ The development of a learning and knowledge hub through the establishment of an on-line platform for sharing ideas, methodologies, manuals, regulations, curricula, teaching material etc.
♦ Enhancement of Work-based Learning in the region,

Listed areas served as the basis for further activities of the WBA4WBL with the goal of developing a regional project focusing on the jointly defined objectives above. Thus, in 2017 and 2018 a series of consultation activities and workshops were organized among the members of the WBA4WBL (Annex 1), resulting in:

♦ Western Balkans Alliance for Work-based Learning On-line Platform setup
♦ Common Framework for Development of Regionally-based Standards of Occupations and
♦ Project Towards Regionally-based Occupational Standards – TO REGOS, approved for funding in 2019 by the Austrian Development Agency with funds of Austrian Development Cooperation[8].

Within the scope of the TO REGOS project mentioned above, the Common Framework for Development of Regionally-based Standards of Occupations, developed during the preparation period, was fine-tuned and elaborated into a methodology. Testing of the methodology on the actual development 5 occupational standards (OS) within 2 sectors (tourism and hospitality and construction industry), is planned for the period from September 2019- September 2020.

These endeavours are not alone in the VET sector in Europe. In 2017, the European Commission opened a Call under Erasmus+ Key Action 3, named Joint Qualifications in Vocational Education and Training. Under this Call, a number of transnational projects are being implemented, with various approaches to the same theme. Thus, activities within the WBA4WBLproject, even though funded through different sources, correspond to the European trends and perspectives.

This publication is the result of the joint efforts, long-lasting cooperation and extensive consultation rounds undertaken among the members of the WBA4WBL, representatives of OeAD Austria, independent experts, the Austrian Chamber of Commerce and the ERI SEE Secretariat. Its purpose is to explain the processes, steps and methods to be used when developing the regionally-based standards of occupations in the Western Balkans region, as seen by the parties mentioned above. The publication hopes to serve as a possible model in approaching the subject of regional and transnational cooperation in this field and is open to be used in other sectors and other regions.

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8 Even though in the first working meetings of the WBA4WBL the representatives of Croatia, Moldova, Romania and Bulgaria were also present, due to various reasons, they currently do not participate in the WBA4WBL project.

I About Methodology for the Development of Regionally Based Occupational Standards

This Methodology for the Development of Regionally-based Occupational Standards (Methodology) consists of the main guiding principles, steps and methods relevant for different stages in the development of regionally-based standards of occupations. The main steps in their development are:

1. National activities for the development of national inputs
2. Consolidation/harmonization of national inputs at regional level
3. Adjustment to national specificities and verification
4. Adoptions at national levels

There are two main cornerstone principles of the entire process of reaching the outputs- regionally-based standards of occupations that are agreed among the participating economies and their adoption at national level.

The **first principle** is the agreement on the same baseline approach used to develop national inputs. This means following the same or similar principles and methods, which will ensure the comparability of results at regional level, and, in the end, the production of a regionally agreed output.

The **second principle** is ensuring the respect and full integration of nationally defined steps, procedures and requirements throughout the process of developing regionally-based standards of occupations and, on the basis of that, their integration into national processes.

This publication is designed as a support mechanism for those principles: to recognize and acknowledge national procedures and requirements, establish common grounds and build on them, and integrate them in regional principles, steps and methods elaborated herewith. It is a tool assisting in development of regionally-based occupational standards, agreed regionally and recognized and adopted nationally, within the framework of the Towards regionally-based occupational standards – TO REGOS Project. The principles described in this publication are welcome to be used in other regional activities of similar nature.

II National activities
   for development of national inputs

The process of the development of regionally-based occupational standards begins at national level, with the process of forming and officially appointing national working groups for occupational standards development (hereinafter: national working groups).

Forming of national working groups members is the result of consultation and involvement of:

- ♦ VET agencies
- ♦ Chambers of commerce
- ♦ Business clusters
- ♦ Union of employers

and is based on the selection of a sample relevant for adequate identification of skills needed on the labour market and its appropriate definition in the occupational standard itself[9].

Therefore, the national working groups are composed based on the following principles:

- ♦ They include representatives of the business sector/business experts – micro, small, medium and large enterprises (when relevant)
- ♦ They may include a representative from education sector (VET teachers and/or HE professors) when foreseen by national methodology.
- ♦ They include no lesser than 5 and no more than 12 business representatives
- ♦ They include business representatives that perform this particular occupation on a day-to-day basis to provide expert input
- ♦ They include business representatives that perform this particular occupation as supervisors with a broader perspective to provide expert input
- ♦ They include 1-2 national experts on standards of occupation to guide and moderate discussions, clarify the input and define it for the occupational standard itself (i.e., education expert/s). They can come from either education, business or independent sector or chamber of commerce,
- ♦ They may include 1 additional expert member contributing to the quality of the output (additional education expert for a particular field, recorder, facilitator etc.)

Business representatives/business experts will be selected and appointed following the national procedures, jointly by the Chambers of Commerce and VET agencies. VET agencies will propose on the involvement of education experts. The agreement between the VET agency and Chamber of Commerce has to be reached, which will be formalized by the VET Centre's formal decision on the appointment of the members of the working groups.

National regulations will be respected in the process.

The copy of the formal decision will be sent to the ERI SEE Secretariat for the information about the selected members of the working groups.

Upon formal selection of business representatives/business experts as members of the national working group, their input on groups of tasks/functions, key functions and activities, will be col-

9 The participation of listed actors differs between economies.

lected through the use of several methods for data collecting- depending on the sector, interest of the business community, and national regulations, such as:

♦ Quantitative survey (survey that uses questionnaire)
♦ Structured or semi-structured interviews or Focus groups.
♦ National meetings three meetings per economy per occupational standard are to be organised. In cases that similar OSs[10] are to be developed in parallel the number of meetings per standard can/should be reduced.

It is up to an occupational standard expert to determine whether qualitative or quantitative methods will be used in combination to national meetings.

National meetings can be implemented face-to-face (F2F) or, in case that the F2F method is not possible, online[11].

In the case of online organization, the number of meetings and their duration can vary, depending on the availability of experts as well as specificities of on-line working. The governing principle to be followed is that the total working time amounts to approximate of 24 hours – the equivalent of 3 working days**.** Thus, for example, it is possible to organize 6 half-day meetings, or 3 full-day meetings, or combinations (for example, 5 meetings: 4 half-day and 1 full day).

At the end of all the meetings, the nationally agreed occupational standard has to be produced.

In order to document the meetings and offer sufficient evidence, the occupational standard expert is in charge of the following:

♦ Deliver meeting minutes describing each online session describing tasks done, participants present and detailing the exact number of working ours.
♦ Deliver the nationally agreed occupational standard.
♦ Deliver snapshots of the screen showing the participation of experts[12] at the beginning and end of each meeting.
♦ List of participants (instead of the signed participants lists)
♦ Meeting agenda for each meeting

The data collection will serve as the basis for:

♦ DACUM analysis
♦ Functional analysis

The input from the business sector will be collected, guided, analysed and moderated by the expert for occupational standards, member of the national working group and appointed for that purpose. He/she will transfer the input onto the unified Template for regionally-based occupational standards (Annex 2), agreed among the participating economies. He/she is in charge of finalizing the nationally-based occupational standard into the format adequate and agreed for regional consultations.

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10 Similar OSs are standards that have overlap in 3 or more key tasks.
11 Meetings should be organised online only if face-to-face organisation is impossible.
12 Using print screen function, sniping tool or other programmes/functions for capturing screens.

National Coordination Points (NCP) for Education and National Coordination Points for Business[13] can participate in the meetings of the working group. While the occupational standards experts are in charge of preparing material for meetings, coordination of national meetings, the NCPs for education and business should provide organizational support when needed. NCPs for education are in charge of delivering minutes/conclusions from the meetings, and list of participants and database to the ERI SEE Secretariat ensuring the visibility of the events, and other similar activities. They also have the possibility to contribute in the process of the development of national occupational standard and provide their input. They make sure that the national working group produces the national standard of occupation and inform the ERI SEE Secretariat if there are some problems. In duly justified cases, if NCPs are at the same time occupational standard experts or business exerts, they must be officially nominated as such. This additional engagement does not exclude them from their role and duties as NCPs.

For activities organized at national level, national procedures and regulations shall be respected.

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13 These are the persons appointed by the home institutions (VET agencies and Chambers of Commerce) to coordinate the activities relevant for the project (Towards Regionally-based Standards of Occupations – TO REGOS) results.

III Consolidation/harmonization of national inputs at regional level

3.1 Face- to-face regional meetings

3.1.1 Preparatory Regional Meeting

The next step refers to the comparison, analysis and consolidation of national inputs as a preparation for regional level aiming at producing the regional output – regionally-based standards of occupations.

This includes:

♦ Delivery of national inputs (result of the national working groups) by National Coordination Points for Education to ERI SEE Secretariat, as the body in charge of the overall management and coordination of the project. National inputs by each participating economy will be sent in due time before the regional meetings, for consideration, translation and adjustments.
♦ Exchange of collected national inputs by Education Reform Initiative of South Eastern Europe Secretariat to all NCPs and their home institutions for preliminary comments and synchronization
♦ Organization of a Preparatory Regional Meeting for consolidating different national inputs, consisting of:
    o National Coordination Points for Education per economy
    o One national expert on standards of occupation per economy who participated in the work of national working groups
    o ERI SEE Secretariat representatives

The meeting can be moderated by one additional expert, if deemed necessary.

During the Preparatory Regional Meeting, the national inputs received from each economy will be analysed and compared. Finally, the national inputs will be edited, consolidated and agreed into one single input – proposal for the regionally-based standard of occupation.

For the consolidation of narrative inputs received from 6 participating economies, a qualitative method and comparative content analysis will be used. The data will be compared, and analysed based on significant statements, units of meanings, textual and structural descriptions in order to separate content that is joint in meaning and form across countries/economies and content that differs in form and/or meaning between two or more countries/economies.

The list of open questions and unclarities will also be defined during the Preparatory Regional Meeting for further considerations.

One Final Regional Meeting for the consolidation of national inputs per occupation will be organized, unless occupations can be merged and dealt with jointly, which depends on the agreement among partners.

3.1.2 Regional Consolidation of National Inputs - Final Regional Meeting

After the Preparatory Regional Meeting, a Final Regional Meeting for the development of region-ally-based standards of occupations will be organized. The purpose of the Final Regional Meeting is to analyse the proposal received as the result of the Preparatory Regional Meeting, consolidate the inputs, and to decide on the final output. The participants to the Final Regional Meeting will make sure that the needs of their countries/economies as well as the needs of the region for skills are represented in the finally agreed regionally-based standard of occupations.

The consolidation process at regional level brings additional value:

- ♦ Outputs are the result of consultations and inputs received from a larger and broad-er sample of employers than it would otherwise be if made only in national context

- ♦ Outputs are meeting the needs of the labour-market of the whole region, rather than just one country/economy

 In addition, with the assistance of external experts for issues of environmental sustainability, social sustainability and gender equality, who will be invited to the Final Regional Meeting, these issues will be reflected and incorporated in the final output – regionally-based standards of oc-cupations.

The participants will be committed to the agreement and strive to reach the consensus on the final output. They will also bear in mind that the 20% flexibility will be available in further steps, to reflect the specific national needs and circumstances.

The Final Regional Meeting for the development of regionally based standards of occupations will be composed of:

- ♦ 1 to 2 representatives of business sector per country/economy participating at national meetings (1 representative from a small/medium company and 1 from a large company) selected based on their:
  - o Active participation at meetings organized at national level as members of the national working groups
  - o Availability for the Final Regional Meeting
  - o Also, representatives of companies active in the region is an added value

Alternatively, the National Contact Point for Business can also represent the business sector.

- ♦ 1 to 2 representative of VET agency per country/economy.
  - o Recommendation is that they are National Coordination Persons for Education and national expert on standards of occupations, member of the national work-ing group
- ♦ External experts for issues of gender equality, sustainability and social inclusion.
- ♦ External moderator/facilitator if deemed necessary
- ♦ ERI SEE Secretariat representative/s

One Final Regional Meeting for the consolidation of national inputs per occupation and final-ization of regional process will be organized, unless occupations can be merged and dealt with jointly, which depends on the agreement among partners.

3.2 Online regional meetings[14]

In the case that regional meetings cannot be organised F2F, the work of regional groups can be organised online. This process is also to be implemented in two main segments: preparation and implementation.

3.2.1 Preparation phase

The preparation phase is led and organised by the ERI SEE Secretariat that is in charge of:

1. Ensuring the IT infrastructure - primarily an online platform. Online meetings participants are in charge of their own IT equipment and of voicing potential obstacles/issues to the ERI SEE Secretariat in a timely manner.
2. Hiring a moderator- a person that will moderate discussion and be responsible for reaching consensus on the final regional OS. It is recommended that this person has vast experience in leading working groups for developing OS and qualification standards (QS) and background in the methodology of social research.
3. Hiring a co-moderator - a person that will keep track of changes in the working documents, assist moderator and provide support to the process. This person can be ERI SEE Secretariat member or VET Centre/Chamber of Commerce employee.
4. Developing the documentation needed for the meetings (meeting agenda, background documents if applicable, and the OS Proposal).

National proposals for the OSs developed during national meetings are to be sent by NCPs/OS experts to the ERI SEE Secretariat and translated to English. Instead of the F2F regional preparatory meeting, national inputs are to be merged and analysed by either:

♦   external OS expert or
♦   ERI SEE Secretariat[15].

All national proposals are to be analysed by applying content analysis which is to result with one unifying/merged OS Proposal. The traces of the content analysis (colour coding, counting, etc.) are to be kept and submitted to regional working groups members.

The OS Proposal will then be sent by the ERI SEE Secretariat to the experts for environmental and social sustainability and gender equality with the task of analysing the content from their respective fields and providing comments.

The OS Proposal with integrated comments from experts is translated to national languages and sent to NCPs for education prior to the first online regional meeting.

The NCPs for education officially nominate the members of the regional working group and share with them material for regional meetings. Regional working group is, in principle, consists of 4 members:

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14 Online working methods have been developed as the 2020 COVID-19 pandemic outbreak that rendered impossible the organization of the face-to-face meetings. However, the F2F method should be prioritized when possible and the switch to online should happen only under extraordinary circumstances. The benefits of F2F are primarily in its efficiency and effectiveness in relation to the production of OFs but also in the fact that helps build/strengthen the regional ties/cooperation in more fundamental and much needed way.
15 It is preferable that analysis is conducted by an individual external to the national working groups.

- Education representatives: NCP for education and/or OS expert
- Business representatives: NCP for business and/or business expert

Prior to the first online meeting, the appointed members of national working groups are to analyse the OS proposal for the regionally-based occupational standard and provide comments to the ERI SEE Secretariat prior to the meeting. The ERI SEE Secretariat representative compiles all comments and includes them into the OS Proposal as the final step in the document preparation.

3.2.1 Implementation phase

The first session of the regional meeting is to be a joint session attended by all appointed participants. It will start by the moderator and co-moderator explaining the methodology of work, giving instructions on how to divide the appointed members into 2 smaller sub-groups and assign tasks. The 2 smaller sub-groups each consist of 2 representatives of one economy. Thus, each sub-group consists of 12 national representatives.

The subgroups work is based on the following principles:

- Each sub-group works on separate groups of tasks, key tasks and activities.
- Sub-group one works on the and groups of tasks OS description, 1, 2, and 3. The rest of the groups of tasks can be shared among the occupational standards.
- Sub-group two works on the description of the occupation, level, categorization and groups of tasks 4, 5, 6, 7, 8 and accompanying key tasks and activities.

The final result of the regional meetings is:

- 1 regionally-based occupational standard in case there are many differences between the occupations that are dealt with.
- 2 regionally-based occupational standards in case there are many similarities between the occupations that are dealt with.

When setting the time of the sessions, the availability of business experts must be duly taken into account and preferably agreed at the end of each session. After each session, the agreed version will be immediately shared to the regional working group members, in order to get their feedback before the subsequent session on the agreed version but as well on the expected contribution.

The regional meeting ends in an on-line plenary session, with all the members present, and going through the final version of the regionally-based OS or OS-s. The members still have the possibility to comment until the consensus is reached and the regionally-based OS or OS-s are endorsed by all members.

Meeting documents:

a. ERI SEE Secretariat is responsible for: (1) producing the list of experts nominated by the NCPs (2) developing time schedule of meetings in cooperation with the moderator and co-moderator (3) Producing the list of participants expected to attend the meeting
b. Moderator and co-moderator are responsible for: (1) producing agenda for each meeting, (2) producing the list of participants who attended the meeting, (3) meeting screenshots (4) OS document with comments and finalised document.

The planning of the timeline for the meetings for the 2 occupational standards within the construction sector within the TO REGOS project is provided in Annex 3 of this document.

IV Adjustment to national specificities and verification

Upon the agreement among the participants of the Final Regional Meeting on the content of the regionally-based standards of occupations, the output will be translated into national languages.

In cooperation between VET agencies and Chambers of commerce, further national verification activities will be organized, according to the national procedures. During the verification activities, the output can be modified up to the 20% to meet the specific needs and circumstance of national contexts.

National verification activities may include the same representatives as in national working groups for national occupational standards.

One national meeting for the adjustment and verification of the regionally-agreed occupational standard will be organised per economy per occupation.

In cases when the organisation of F2F meetings is no possible, online sessions can be organised. The online sessions follow the same principle for organisation of online meetings on national level as described in section II National activities for development of national inputs.

V Adoptions at national levels

Upon verification of the outputs, in accordance with national procedures, the adoption procedure will be initiated. The VET agencies will coordinate the process (namely the National Coordination Point for Education).

Upon adoption, VET agencies will announce the adoption on their web pages and inform ERI SEE Secretariat thereof.

Annex 1: Templates for Regionally-based Occupational Standard and Guidelines

Templates for Regionally-based Occupational Standard

Template A

Full format of a standard with proposed groups of tasks/functions

Occupational standard:

Occupation:

Sector:

ISCO Level:

Description of occupation:

Working Environment and Working Conditions:

Relationship with other professions:

Occupational standard:		
GROUP OF TASKS/FUNCTIONS	KEY TASKS	ACTIVITIES
1. Analysis, planning and organization of work	1.1.... 1.2.	
2. Preparation of the Workplace		
3. Operational tasks		
4. Administrative tasks		
5. Commercial tasks		
6. Communication and cooperation with others		
7. Quality assurance		
8. Protection at workplace and Environment Protection		

Template B

Full format of a standard without the pre-defined groups of tasks/functions

Occupational standard:

Occupation/s name:

Sector:

ISCO Level:

Description of occupation/s:

Working Environment and Working Conditions:

Relationship with other professions:

Occupational standard:		
GROUP OF TASKS /FUNCTIONS	KEY TASKS	ACTIVITIES
1.	1.1.... 1.2.	
2.		
3.		
4.		
5.		

Guidelines for filling-in the template

The template should be filled in English.

It is advisable that the Groups of Tasks/Functions are classified according to the criteria that correspond to the occupation being defined.

Some of the Group Tasks proposed for consideration include:

1. **Analysis, planning and organization of work**: *Activities related to planning work activities, assigning jobs, determining the resources needed to perform a job.*

   For example: Determining the ingredients required for preparing dishes; Determining the material required for dressing up; Preparing the draft specification; Receiving and properly packing the packaging; (It is recommended to write activities as broad statements. There is no need to break them to too much detail- Summarize existing activities and integrate them into larger entities).

2. **Preparation of the Workplace**: *Work related to the preparation of the workplace and the equipment necessary for carrying out the work.*

   For example: Checking the validity of equipment; Maintaining machinery or equipment; Opening and preparing a shop / party store; Preparing a computer for use;

3. **Operational Tasks**: *Activities related to the implementation of methods, processes and procedures for performing major occupational activities*

   For example: Accounting and book-keeping management; Programming of numerically controlled machine tools and machining of machine parts; Providing of health care to internist patients;

4. **Administrative Tasks**: *Business tasks related to recording and monitoring of work activities*

   For example: Organization of office operations; Creating activity reports; Managing nursing documentation; Preparing documentation on inventory status;

5. **Commercial tasks**: *Activities related to marketing, promotion and sales of products and services*

   For example: Product advertisement creation; Participating in sales activities; Creating a bill for payment for a sold goods or services; Identifying market opportunities from sales reports to prepare a new product or service;

6. **Communication and cooperation with others**: *Activities related to communication (verbal, written, use of information technology) with clients, associates and other stakeholders.*

   For example: Developing high-quality communication with a client or associates; Conducting a team meeting to plan activities; Organizing a team of people to accomplish a specific task;

7. **Quality assurance**: *Activities related to monitoring, monitoring and maintaining the quality of products or services, including the establishment of quality standards, monitoring of own work and work of others and the application of external quality standards*.

    For example: Product check in accordance with specifications; Check quality of goods and/or services in accordance with applicable regulations and standards; Apply measures in a case that quality standards have not been met;

8. **Protection at Workplace and Environmental Protection**: *Activities related to the protection of one's own health and the health of associates, and the preservation of the environment through proper use of materials and equipment and application of safety procedures and rules.*

    For example: Application of procedures for the protection of dangerous substances; Usage of equipment in the correct manner; Usage of equipment and materials in accordance of safety rules in profession;

Important note: In a case that for a specific occupation, some of the groups of tasks/functions cannot be defined, that part of the template should state – NOT APPLICABLE.

Annex 2: Planning of online meetings within the TO REGOS project

For the purpose of the organising online meetings for developing two occupational standards within the construction sector a potential timetable of the on-line regional meeting sessions is developed. The timeline takes into account specificities of the TO REGOS project (having 2 occupational standards that have similarities in 7 out of 8 groups of tasks) and is just an example of how tasks can be divided and meetings organized on-line.

Session	Participants	Tasks	Duration
	ALL	Introduction	1 hour
	SUBGROUP 1	Groups of tasks 1 and 2	2 hours
	SUBGROUP 1	Groups of tasks 3 (OS one)	3 hours
	SUBGROUP 1	Groups of tasks 3 (OS one)	3 hours
	SUBGROUP 2	Groups of tasks 3 (OS two)	3 hours
	SUBGROUP 2	Description, level, categorization	3 hours
	SUBGROUP 2	Groups of tasks 4, 5	2 hours
	SUBGROUP 2	Groups of tasks 6, 7, 8	2 hours
	ALL	Finalization and endorsement – Groups of tasks 1, 2,	2 hours
	ALL	Finalization and endorsement – groups of tasks 3 (OS one)	3 hours
	ALL	Finalization and endorsement – groups of tasks 3 (OS two)	3 hours
	ALL	Finalization and endorsement – groups of tasks 4, 5, 6, 7, 8	3 hours

Annex 3: Glossary

Core terms

Business clusters

A network of connected businesses, suppliers, and associates in a specific field that are all located in the same geographical area. Clusters are thought to provide increased efficiency and productivity so businesses can be competitive on a national and global scale.[16]

Description of occupation

Occupational description is a brief general statement describing an occupation in comparison to an occupational standard that is more detailed listing of all major activities that a worker must perform in the occupation.[17]

Examples of things a job description might include are:

- the job title

- the employer's name and its focus

- the job purpose

- main tasks and responsibilities

- the reporting lines of the job- who the person is responsible to and (if appropriate) which other roles report to them

- any minimum legal requirements, education or qualifications, or occupational licensing

- ideal personal skills, knowledge and attributes for the job

- any delegated authority the position has (financial and people)

- place of work

- performance measures for the job

- hours of work

- wage or salary range

- customers and stakeholders, who the job works with internally and externally

- any organisational competencies or values

- the type of employment (e.g. full-time, part-time, permanent, fixed term, casual).[18]

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16 http://www.businessdictionary.com/definition/business-cluster.html
17 European Training Foundation (2001), A Framework for Defining and Assessing Occupational and Training Standards in Developing Countries, Turin, Italy
18 https://www.employment.govt.nz/starting-employment/hiring/describing-the-job/

Employer

An employer is a person who operates his or her own unincorporated economic enterprise or engages independently in a profession or trade and hires one or more employees. (Definition also used by the Australian Bureau of Statistics)[19]

Employees

Employee as an individual who works for a public or private employer and who in return receives compensation in the form of wages, salaries, fees, gratuities, payment by results or payment in kind. Professional military staff are also included.[20]

Enterprise size

Enterprises can be classified in different categories according to their size; for this purpose different criteria may be used (e.g. number of persons employed, employees, balance sheet total, investments,...), but the one most common in a statistical context is number of persons employed:

- **micro enterprises**: *fewer than 10* persons employed;

- **small enterprises**: *10 to 49* persons employed;

- **medium-sized enterprises**: *50 to 249* persons employed;

- **large enterprises**: *250 or more* persons employed.

The number of persons employed should not be confused with employees or full-time equivalents; 'persons employed' includes employees but also working proprietors, partners working regularly in the enterprise and unpaid family workers.[21]

Function

Function is a group of duties that constitute one of the distinct and major activities involved in the work performed. A Duty is a distinct activity that is a logical, essential step in the performance of a function and a detailed description of: what work is done (action), how the work is done (procedures, materials, tools or equipment) and why the work is done (purpose).[22]

Group of tasks

Groups of tasks in occupational standards are defined as group of tasks which are common to all occupations, no matter in which sector they are, or what is complexity of occupations covered by occupational standard.[23]

Job

Job is defined as a set of tasks and duties executed, or meant to be executed, by one person; (...) Persons are classified by occupation through their relationship to a past, present or future job.[24]

Job standard

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19 Wahba, M (2013) Glossary of Terms for TVET, Assessment and Verification, http://www.unevoc.unesco.org/e-forum/Glossary%20of%20Terms%20for%20TVET%20Assessment%20and%20Verification.doc
20 https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Employee_-_LFS
21 ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Enterprise_size
22 2013 Guide to Writing Job Descriptions
23 Agencija za strukovno obrazovanje i obrazovanje odraslih (2011), Metodologija za razvoj strukovnih standarda zanimanja, kvalifikacija i kurikuluma
24 https://stats.oecd.org/glossary/detail.asp?ID=1876

The level of achievement that an individual is expected to reach by reference to specified rating levels (standards) and criteria that have been decided for each task / activity within a job/job title.[25]

Job relevant skills

Job-relevant skills are task-related and build on a combination of cognitive and socio- emotional skills. Cognitive skills, defined as the "ability to understand complex ideas, to adapt effectively to the environment, to learn from experience, to engage in various forms of reasoning, to overcome obstacles by taking thought. Social - emotional skills, also referred to as soft or non-cognitive skills, relate to traits covering multiple domains—social, emotional, personality, behavioural, and attitudinal among them.[26]

Key performance indicators (KPIs)

Key Performance Indicators (KPIs) are the critical (key) indicators of progress toward an intended result. KPIs provides a focus for strategic and operational improvement, create an analytical basis for decision making and help focus attention on what matters most.[27]

Occupation

An occupation is defined as a set of jobs whose main tasks and duties are characterised by a high degree of similarity. A person may be associated with an occupation through the main job currently held, a second job or a job previously held.[28]

Occupational standard

There are different approaches to the term occupational standard:

- ♦ Occupational standard refers to the statements of the activities and tasks related to a specific job and to its practice;[29]

- ♦ It can also be as "statements of the skills, knowledge and understanding needed for effective performance in a job role and are expressed as outcomes of competent performance.[30]

Occupational skills profile (OSP)

An OSP summarises essential characteristics required for a given job: the level of education and training required (and hence the complexity of the occupation); the field of education and training required; and other requirements in terms of knowledge, skills, competence, occupational interests, and work values.[31]

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25 Wahba, M (2013) Glossary of Terms for TVET, Assessment and Verification, http://www.unevoc.unesco.org/e-forum/Glossary%20of%20Terms%20for%20TVET%20Assessment%20and%20Verification.doc

26 Roseth V.V, Valerio A, Gutiérrez M (2016) Education, Skills and Labor Market Outcomes, International Bank for Reconstruction and Development / The World Bank

27 https://kpi.org/KPI-Basics accessed: 21 June 2019

28 https://unevoc.unesco.org/go.php?q=TVETipedia+Glossary+A-Z&filt=all&id=336

29 Publications Office of the European Union (2014) Terminology of European education and training policy, Luxembourg

30 https://www.skillsactive.com/standards-quals/national-occupational-standards

31 Publications Office of the European Union (2013) Quantifying skill needs in Europe, Luxembourg

Performance criteria

The part of a competency standard which specifies the required level of performance to be demonstrated by students to be deemed competent.[32]

Sector

A sector defines a group of related economic entities or enterprises (e.g., financial sector, mining sector, and agricultural sector).[33]

Standard of competence

A performance specification describing what is expected of a person performing a particular work activity. It is expressed in elements of work together with performance criteria. Tasks, functions, competencies. Jobs consist of tasks. Within individual tasks, functions can be identified requiring certain competencies. Such competencies become "competency elements". A competency element may be described through its title, the task to be implemented, performance criteria, and underpinning knowledge and skills [34]

Work Activity

The systemic entity of purposeful, cooperative human action, where several actors work in an organized way upon a shared object of work to transform it into an intended outcome, by using different kinds of means of work and means of cooperation and coordination. The intended outcome forms the purpose (motive) of the activity. Information entities, information tools, and information systems are used within work activities alongside with other means of work and means of cooperation and coordination.[35]

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32 http://www.ivet.com.au/a/44.html#P

33 Publications Office of the European Union (2014) Terminology of European education and training policy, Luxembourg

34 https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/publication/wcms_420961.pdf

35 https://www.igi-global.com/dictionary/researching-activity-driven-approach-information/33271

Potential methods for preparation of occupational standards

In order to *prepare data* for Occupational standards, it is proposed to conduct surveys and collect data, using methods such as interviews, questionnaires, focus groups, market analysis surveys, public opinion polls, literature reviews, and file reviews. [36]

Surveys

Employers' survey

Method of obtaining candid opinion of employers by giving them an opportunity to anonymously answer queries raised in a questionnaire.[37]

Labour force survey

enables realization of situation and monitoring of labour market changes through internationally established indicators, including employment and unemployment rates. Additionally, the survey provides socio- demographic characteristics of the employed, unemployed and inactive population, and is the only source regarding the information on informal employment.[38]

Questionnaire

A set of defined questions, with a choice of answers, used to collect information from respondents.[39]

Structured interviews

Eliciting information from a person or group of people in an informal or formal setting by asking relevant questions and recording the responses.[40] Face-to-face consultations with employers, based on prepared questions or questionnaire.

Focus group

A group formed to elicit ideas and attitudes about a specific product, service, or opportunity in an interactive group environment. The participants share their impressions, preferences, and needs, guided by a moderator.[41]

Working group

A collection of individuals that come together to achieve a stated objective. In a business context, a working group might involve people from different divisions or even companies that are collaborating on a project that requires their particular expertise or time.[42]

Skills analysis

An identification of the skills or competencies needed for each job.[43]

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36 https://www.rds-yh.nihr.ac.uk/wp-content/uploads/2013/05/12_Surveys_and_Questionnaires_Revision_2009.pdf

37 http://www.businessdictionary.com/definition/employee-survey.html

38 http://www.stat.gov.rs/en-us/oblasti/trziste-rada/anketa-o-radnoj-snazi/

39 https://www.iiba.org/standards-and-resources/glossary/

40 https://www.iiba.org/standards-and-resources/glossary/

41 https://www.iiba.org/standards-and-resources/glossary/

42 http://www.businessdictionary.com/definition/working-group.html

43 https://unevoc.unesco.org/go.php?q=TVETipedia+Glossary+A-Z&id=423

Job analysis

The process of examining a job in detail to identify its component tasks; the detail and approach may vary according to the purpose for which the job is being analysed, e.g., training, equipment design, work layout.[44]

Three methodologies for defining occupational standards reflect this evolution from initial task-based to competence-based occupational analysis and standards. The methods include job/task analysis, DACUM, and Functional Analysis.[45]

Job/task analysis

The aim of the analysis is to divide and subdivide jobs and tasks into their constituent parts, in order to provide information for training and to develop benchmarks for piece rate wages. In spite of fundamental changes in job and task analysis, the approach is still used for specific purposes and in certain sectors, including some service and administrative occupations.

DACUM

DACUM is an acronym for developing a curriculum. It is a one- or two-day storyboarding process that provides a picture of what the worker does in terms of duties, tasks, knowledge, skills, traits and in some cases the tools the worker uses. The information is presented in graphic chart form and can include information on critical and frequently performed tasks and the training needs of workers[46]

DACUM is an acronym for **D**eveloping A **C**urricul**UM**, but it actually involves only the first step in a full vocational curriculum development process. Instead of job observation, DACUM uses guided group discussion with expert workers. The DACUM process includes, in addition to occupational specific tasks, the separate identification of work enablers: general knowledge and skills, worker behaviours (personal traits and interpersonal skills), and tools and equipment used. These tasks become the focus of curriculum development. DACUM is used in many developed and developing countries.[47]

Functional analysis

Functional Analysis (FA) is not a method for occupational analysis in a strict sense. Rather, the idea is to start with the identification of the key purpose of an occupation in the major sectors where it is found, identifying the main functions, breaking these in turn down to subfunctions until outcomes for each function are identified following a strictly logical sequence. Functional Analysis, as practiced in the United Kingdom, uses a consultative process that involves practitioners, managers, and, in some cases, the users or "consumers" of standards. The modules are analysed one by one to identify the perform- 25 Developing OS Developing OS mane requirements. The FA method has been used in several countries in Europe and the Middle East and is being experimented with in South America.[48]

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44 https://unevoc.unesco.org/go.php?q=TVETipedia+Glossary+A-Z&id=258
45 https://unevoc.unesco.org/e-forum/A_Framework_for_Defining_Training_Standards.pdf
46 http://www.trc.eku.edu.
47 https://unevoc.unesco.org/e-forum/A_Framework_for_Defining_Training_Standards.pdf
48 https://unevoc.unesco.org/e-forum/A_Framework_for_Defining_Training_Standards.pdf

Main organisations

ILO - International Labour Organization

The only tripartite U.N. agency, since 1919 the ILO brings together governments, employers and workers of 187 member States , to set labour standards, develop policies and devise programmes promoting decent work for all women and men.[49]

ISCO - International standard classification of occupations

The International standard classification of occupations, abbreviated as ISCO, is an international classification under the responsibility of the International Labour Organization (ILO) for organising jobs into a clearly defined set of groups according to the tasks and duties undertaken in the job.[50]

ESCO - European Skills, Competences, Qualifications and Occupations

In ESCO, each occupation is mapped to exactly one ISCO-08 code. ISCO-08 can therefore be used as a hierarchical structure for the occupations pillar. ISCO-08 provides the top four levels for the occupations pillar.[51]

EUROSTAT

Eurostat is the statistical office of the European Union, based in Luxembourg (LU). It publishes official, harmonised statistics on the European Union and the euro area, offering a comparable, reliable and objective portrayal of Europe's society and economy.

A vast range of data is available for the EU as a whole, for Member States and in many cases also for candidate countries, EFTA members and other European countries, down to the level of regions and cities. All users may consult or download data and publications free of charge from the Eurostat web site.[52]

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49 International Labour Organization (ILO)
50 https://www.ilo.org/public/english/bureau/stat/isco/
51 https://ec.europa.eu/esco/portal/home
52 https://ec.europa.eu/eurostat/about/overview

Classifications

ISCED

The **International standard classification of education**, abbreviated as **ISCED**, is an instrument for compiling internationally comparable education statistics.[53]

ISCO

ISCO is intended both for use in compiling statistics and for client-oriented uses such as the recruitment of workers through employment offices, the management of migration of workers between countries and the development of vocational training programmes and guidance.

The first ISCO version, known as *ISCO-58*, was adopted in 1957 by the Ninth International Conference of Labour Statisticians; subsequent versions were *ISCO-68* (Eleventh International Conference of Labour Statisticians, 1966), *ISCO-88* (Fourteenth International Conference of Labour Statisticians, 1987) and the *ISCO-08*, adopted in December 2007.

IISCO-08, developed by the ILO, provides a system for classifying and aggregating occupational information obtained by means of statistical censuses and surveys, as well as from administrative records. It is a four-level hierarchically structured classification that allows occupations to be classified into 436-unit groups. Since each ESCO occupation is mapped to one ISCO-08-unit group, the two classifications are interoperable.

The International Standard Classification of Occupations (ISCO) is used to classify jobs. For the purpose of ISCO, a job is defined as a set of tasks and duties performed, or meant to be performed, by one person, including for an employer or in self-employment. An occupation is defined as a set of jobs whose main tasks and duties are characterised by a high degree of similarity. A person may be associated with an occupation through the main job currently held, a second job or a job previously held. Jobs are classified by occupation with respect to the type of work performed, or to be performed. The basic criteria used to define the system of major, sub-major, minor and unit groups are the "skill level" and "skill specialisation" required to perform the tasks and duties of the occupations competently.[54]

ESCO

ESCO is the multilingual classification of European Skills, Competences, Qualifications and Occupations. The ESCO classification identifies and categorises skills, competences, qualifications and occupations.

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53 http://uis.unesco.org/sites/default/files/documents/international-standard-classification-of-education-isced-2011-en.pdf
54 https://www.oecd.org/sti/inno/Frascati-2015-Glossary.pdf