



**CEDEFOP**

European Centre for the Development  
of Vocational Training



Education and Culture DG

Lifelong Learning Programme

## **Handbook for organisers of study visits for education and vocational training specialists**

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## **Introduction**

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

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

This handbook is based on ideas, reflections and suggestions from participants' reports, annual meetings of national agencies and organisers and from assessments of study visits made in previous programmes. We offer it to help organisers of study visits to build and implement interesting and effective programmes.

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

## **The study visits programme**

A study visit lasts three to five days with a group of between 10 and 15 education and vocational training specialists and decision-makers coming together to examine a particular aspect of lifelong learning in another country.

Depending on the approach, there are three types of study visit: those that explore themes from:

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

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

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

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

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

Study visits is part of the lifelong learning programme of the European Union and as such it is related to the four sectoral programmes of the LLP, namely, Comenius, Leonardo da Vinci, Erasmus and Grundtvig. It covers themes of interest to representatives of various education and training fields and creates an opportunity for them to establish contacts for future cooperation. Each study visit and the entire programme contribute to achieving the objectives of the Lisbon strategy for growth and jobs and the Education and training 2010 work programme, as well as the Bologna and Copenhagen processes and their successors (see Annex 1).

### **Coordination of the programme at European and national levels**

#### ***European Commission***

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

#### ***Cedefop***

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

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

#### ***National agencies***

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

A calendar of the programme's cycle is provided in Annex 2.

## **Role and responsibilities of organisers**

### ***Who can be an organiser?***

Any institution or organisation dealing with general or adult education, vocational education and training, teacher training, guidance services or local and regional educational administrations, trade union or employers' organisations with interesting achievements they wish to share with colleagues from other European countries can host a study visit. It is interesting to note that many organisers decided to host a study visit at their institutions after participating in a study visit in another country.

It is advisable for a host institution to form a team responsible for organising a visit, with one individual appointed as a contact person. To organise a good study visit, the team should:

- be familiar with the education and vocational training system of the country and the subject-matter of the study visit;
- have an open and positive social attitude;
- speak the working language of the visit;
- have time management, organisational and logistical skills;
- have or raise at least a small budget and be able to manage it.

Having a team not only makes the work lighter, it can also contribute to the quality of the programme offered. It helps avoid problems if the contact person has to withdraw or is absent at the time of the study visit.

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

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

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

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

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

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

### ***Responsibilities of organisers***

Before a visit, organisers:

- define the aims and state general concept of the visit;
- discuss a draft proposal with their authorities and the national agency;
- submit a proposal for the annual catalogue <sup>(2)</sup>;
- draw a preliminary draft programme of the visit and update it regularly;
- find and arrange accommodation;
- identify and contact institutions and organisations to be visited;
- identify and contact speakers;
- learn about the professional background, interests and motivation of group participants as well as special needs that might require special arrangements;
- inform all involved parties of the visit, including writing an article in the local press or placing information on the institution's website;
- establish contact and keep participants informed of relevant issues;
- prepare background documentation on the theme in the host country;
- if the contact person leaves and no back-up exists, organisers should immediately inform the NA and look for solutions.

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

During the visit, organisers:

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

After the visit, organisers:

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

## **Role and responsibilities of participants**

### ***Who can be a participant?***

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

For example:

- directors of education and vocational training institutions, centres or providers;
- directors and representatives of guidance centres;
- directors of validation or accreditation centres;
- educational and vocational training inspectors;
- head teachers, teacher trainers;

- pedagogical or guidance advisers;
- company human resource and training managers;
- owners/managers of small and medium-size enterprises (SMEs);
- representatives of employers' organisations;
- representatives of trade unions;
- representatives of chambers of commerce, industry, or crafts;
- representatives of education and training networks and associations, including teachers with a leading role in such networks;
- representatives of local, regional and national authorities;
- researchers.

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

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

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

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

### ***Responsibilities of participants***

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

- prepare for the visit by reading documentation provided by the organisers and Cedefop,
- prepare a contribution on the theme of the visit following instructions from the organiser, present and share the experience of their country in dealing with the theme,
- play an active part in all activities at the times scheduled in the programme throughout the visit,

- help prepare the group report,
- try to establish professional contacts that might be used for developing new projects and creating networks,
- disseminate the knowledge and information acquired during the visit in their country, including policy-makers at local, regional or national levels,
- submit individual reports to the NA according to grant agreement requirements;

as well as:

- confirm their participation to the organiser of the study visit and the NA;
- make their own travel arrangements (reservation and payment of tickets);
- confirm in time their reservation at the hotel arranged by the organiser;
- bear costs connected with the study visit, such as meals, accommodation and any local travel;
- organise accident/health insurance cover during the study visit;
- immediately inform the national agency and the organiser in case of cancellation.

## **Preparing a visit**

### ***Finding and arranging hotel and transportation***

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

The hotel for a study visit:

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

The organiser should try to negotiate group rates with the hotel. When the names of participants are known, the organiser should send the list to the hotel to be considered as a group. The organiser should inform the hotel that participants will confirm their bookings directly and pay for their rooms and extras themselves.

For local travel, the organiser might consider hiring a minibus, which has been frequently done in the past and saves time and expenses. The costs can be split among participants. If larger distances are to be covered by rail or other public transport, group tickets are advisable. The organiser should inform participants in advance of any costs related to transport, then purchase tickets and settle with participants afterwards.

### ***Number of participants in a group***

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

Cancellation of a visit should only be considered as the last option.
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### ***Identifying and contacting speakers and host institutions***

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

The organiser should make agreements with potential speakers and hosts of site visits well in advance (optimal time will be 10 to 12 weeks before the visit) and receive confirmation in due time. It is useful to have a list of alternative speakers and places to visit in case someone has to cancel at short notice.

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

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

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

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

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

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

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

### ***Drafting a programme***

After identifying and contacting potential speakers and host organisations and exploring available accommodation and catering facilities, local transport and social and cultural resources in the town or district, the organiser should draft a provisional programme (see Annex 3 for the guidelines for a programme).

It is advisable to have a draft programme at least three months before the visit.
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Based on previous experience and good practice, the following suggestions can be useful:

- The programme should be consistent with the announced theme and description provided in the catalogue. It is worth remembering that the description in the catalogue was the basis for participants to choose the study visit and determined their expectations.
- The programme should combine theoretical presentations of the theme, discussions and field visits. It should include various opinions and approaches, whether complementary or contradictory. All parts of the programme should complement one another to create a comprehensive and realistic picture of the theme in the host country by the end of the week.
  - A theoretical presentation of the host country on the theme should set the stage for the field visits and serve as a basis for further discussions. It is good to explain how the education and training system relates to the socio-economic background and labour market needs of the region or country.
  - It is advisable not to spend a lot of time on a general presentation of the education and training system of the host country. Links to reviews of national systems and glossaries are available from the Cedefop study visits website: <http://studyvisits.cedefop.europa.eu>.

- Theoretical presentations should be short and stimulating exchanges of opinions between participants and speakers.
- The number of field visits per day should be limited to allow some flexibility in the time schedule and not overcrowd the programme.
- The programme should be based both on examples of good practice and more representative and typical practices. Discussing challenges is a good opportunity for participants to share approaches from their countries, which might prove enriching for the host.
- “Hearing all voices” is crucial for success. The theme of the visit should be presented from various perspectives – those of government and policy-makers at all levels, social partners, heads of institutions, teachers and trainers, students and users of education and training services.

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

- Visits to schools, training centres and other establishments form an important part of the programme. The organiser should think of the following: will there be an introductory briefing? Is silent observation appropriate or will interaction with pupils/students/trainees be encouraged? Meeting teachers, students and trainees is always highly valued by participants and the organiser should make an effort to provide for this opportunity. Students can make interesting and lively presentations which exemplify the skills they gain; they can also guide visitors around the school or town.
- The programme should include not only presentations of policies, measures, activities, but also evaluation of their effectiveness. Policy implementation is always the most difficult part of the policy process and participants are usually interested in the practical aspects of policy implementation which can be covered by meeting practitioners. If new policies and measures are presented, participants are usually interested to know what monitoring and evaluation mechanisms are in place so those interested can later follow up and explore it.
- Regardless of the main theme of the visit, participants are interested in learning about providing education and vocational training for disadvantaged groups (immigrants, certain groups of women, dropouts, low-skilled workers) as well as financing mechanisms for education and training.
- The organiser should think of the intercultural aspect, a hidden programme of the visit. Participants highly appreciate learning about the history and culture of the location, as culture is not simply dress, music, food, etc. but is something that influences thinking, attitudes and values.

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

### ***Contacting participants***

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

Organisers should learn about the professional background and areas of interest of participants as well as their motivation to participate in the visit and take these into account when preparing the programme.

They should also be aware of participants' levels of language skills. Using the European common framework for languages grid<sup>(3)</sup> has made it possible to get a better idea of participants' levels of language skills. The organiser might pay attention to the levels of spoken interaction important for active participation in discussions. In case of foreseen language problems, the organiser should consider providing some language support and inform the NA.

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

This information is available for organisers in the online management information system (see chapter on management information system – OLIVE).

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

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

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<sup>(3)</sup> Common European framework of reference for languages. Available at: [http://www.coe.int/T/DG4/Portfolio/?L=E&M=/main\\_pages/levels.html](http://www.coe.int/T/DG4/Portfolio/?L=E&M=/main_pages/levels.html)

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

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

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

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

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

Pre-visit communication with participants should also include:

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

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

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

### ***Preparing background information on the theme of the visit***

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

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

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

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

### ***Promoting the visit***

It is important to promote the study visit at local, regional or national levels and draw attention to its importance for the town/region. The following strategies can be used:

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

A checklist provided in Annex 4 will assist organisers with preparations.

### **Suggestions for the practical running of a study visit**

#### ***Informal meeting on the eve of the start***

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

At this meeting, organisers:

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

This is also an appropriate moment to explain the customs and habits of the host country: eating, working hours, socialising habits, modes of transport, opening and closing hours of shops, museums, etc.

A guided tour of the city can also be organised on the arrival day.

### *A typical day*

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

The daily pattern of the programme is generally a half-day devoted to theoretical sessions and a field visit or maximum of two field visits. Mostly, the morning is dedicated to contributions from institutions, political decision-makers, social partners, etc. and the afternoon is used for visits to schools, training centres, enterprises, guidance centres, etc. This approach is seen as best practice. However, it can also be the other way around, as many institutions have their main activities in the morning. This mix between speakers, roundtables and field visits will make a well-balanced programme. Organisers should be flexible to design their programme in the most appropriate way.

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

For instance, you can ask participants to circulate before the visit a two-page or a four- to five-slide presentation.
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It can also be good to provide information or a link to sectoral programmes of the LLP to make participants aware of other possibilities for potential use of the contacts they acquire during the visit (creating a partnership project between schools under Comenius or Leonardo da Vinci, a learning partnership under Grundtvig, etc.). The organiser can invite a NA representative or local/regional representative for the LLP to give a short presentation on the programme. If this is not possible, the organiser should draw attention to EU websites about the programmes (see Annex 1).

Discussion, debate, dialogue - the importance of giving space and time for these cannot be underestimated. Possibility to share and generate ideas within the group and with host institutions is one of the most valuable parts of a visit. Participants most appreciate interactive forms of work. It is essential to allocate time for group discussions and question-answer sessions.

The organiser should be stressing at all times that a study visit is a learning opportunity both for hosts and visitors. When visiting institutions, participants should have an opportunity to introduce themselves to all host institutions and hosts should be able to interact with visitors. Participants appreciate hosts being well-informed by organisers of the background of group members.

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

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

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

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

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

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

### **Group report**

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

The report should:

- help participants, through discussion and exchange of impressions, summarise their learning experience;

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

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

When preparing the report, participants should think about potential readers who should be able to learn from their experience. It may be useful to think of the group report as the basis for an article which participants could write when they return to their working life.

The report is submitted online in the management information system (Olive).

### **Management information system – OLIVE**

Cedefop provides an interactive management information system that is commonly referred to as "Olive" at <http://studyvisits.cedefop.europa.eu/> .

As soon as groups are formed, Cedefop will inform organisers of access to the restricted area in Olive. Each organiser will receive a username and password. Organisers should use it to access information about participants in their group(s), their background and contact details, and also to follow changes in the group.

Manuals on how to use Olive are available online.

## Annexes

### *Annex 1. Policy context of lifelong learning*

In 2000, the Council of the European Union developed a strategy in response to Europe's main challenges: globalisation, demographic change and the knowledge economy. This became known as the **Lisbon strategy**. It set an ambitious goal for the European Union: to become by 2010 the 'most competitive and dynamic knowledge-based economy in the world' (see Figure 1).

To become a knowledge society, Europe needs more economic growth, more and better employment and a society that is socially cohesive. To achieve these aims, Europe needs to improve its performance in education and training. This means that all Europeans need to have the opportunity to acquire knowledge, skills and competences throughout their lives. This has made education and training an important policy lever.

Therefore, in 2001, education ministers agreed for the first time on a common strategy for education and training. Making learning accessible for all Europeans at all ages and improving the quality and efficiency of education and training were considered top priority. It was also decided to open education and training systems to the wider world. For this purpose, a work programme until 2010 was developed in 2002 known as the **Education and training 2010 work programme**. Education and training in Europe was to become a quality reference for the whole world (see Figure 2).

The Education and training 2010 work programme embraced a process which started in 1999 known as the **Bologna Process**. It aimed at restructuring European higher education systems to make them more comparable and compatible. Lifelong learning was made one of the key objectives of the Bologna process in 2001 (see Figure 4).

Recognising its value and important role in achieving the Lisbon objectives, the responsible ministers, the European social partners and the European Commission decided to cooperate closely in vocational education and training (VET). In the **Copenhagen declaration** (2002), they agreed to make VET more transparent and open and improve its quality. The Copenhagen process aims to make lifelong learning more easily accessible and promote educational, occupational and geographical mobility (see Figure 3).

The policy-related work described under the Education and training 2010 work programme is complemented by the **Lifelong learning programme**. This single integrated programme supports cooperation in all education and training sectors at grass root level. It provides financial support to individuals and institutions to participate in thousands of cooperation projects each year. These projects also enable learners as well as teachers and trainers to spend some time in an institution or an enterprise abroad (see Figure 5).

In conclusion, a coherent framework for cooperation in education and vocational training has been put in place. As progress reports show, this framework has helped to support national reforms and develop several EU reference tools.

Reaching out to all involved is crucial to progress in the areas where a lot remains to be done and to ensure that policy initiatives and tools are implemented across education and training systems. The study visits programme brings together a wide spectrum of education and training specialists and policy-makers to discuss, learn from one another and share experiences in implementing lifelong learning policies in their countries. This exchange among those who exercise responsibility for education and training contributes to multi-faceted cooperation of Member States and other participating countries (Iceland, Liechtenstein, Norway and Turkey) in lifelong learning to achieve Lisbon objectives.

Figure 1.

### *Lisbon strategy for growth and jobs*

Adopted in 2000 by Heads of State or Government, the Lisbon strategy set an ambitious objective. By 2010, the European Union was “to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth, with more and better jobs and greater social cohesion”. To achieve this goal three main areas for action were identified:

- making Europe a more attractive place to invest and work,
- fostering knowledge and innovation,
- creating more and better jobs.

The underlying concept was that a stronger economy would create employment. Innovation was considered the motor for economic change. Inclusive social and environmental policies would drive economic growth even further. To achieve the goals, a range of measures and reforms were agreed for economic, social, and environmental renewal and sustainability.

Apart from sound macroeconomic conditions, knowledge was regarded as a crucial factor to guarantee Europe’s competitiveness (“learning economy”). Education and training also help to ensure that people have equal opportunities and can engage actively in society. Hence, education and training was identified as one of the policy levers to address Europe’s challenges. Investing more in people through better education and skills and improving the adaptability of workers’ has become one of its priorities.

Since its review in 2005, the strategy has focused on growth and jobs. The European Commission and Member States work in close partnership. Member States established national programmes to carry out reforms based on collectively agreed policy guidelines. They report annually on progress. Exchange of experience and common learning is central to the work.

From 2008 to 2010, more emphasis is placed on Europe’s social objectives. These goals require inclusive education and training policies and coherent and comprehensive lifelong learning strategies. In the framework of the strategy, the European Commission also prepared a renewed social agenda. It includes initiatives in employment and social affairs, education and youth, health, information society and economic affairs.

More information can be found at:

[http://ec.europa.eu/growthandjobs/faqs/background/index\\_en.htm#bg01](http://ec.europa.eu/growthandjobs/faqs/background/index_en.htm#bg01)

Figure 2.

***Education and training 2010 work programme***

Education and training 2010 work programme of the European Commission is a policy framework of cooperation between Member States in education and training towards achieving the Lisbon goals.

In 2001, Member States agreed, while respecting national diversity, three common goals for education and training systems:

- improve the quality and effectiveness of systems,
- ease access to education and training,
- open EU education and training systems to the wider world.

Modernisation and reform of education and training systems is the responsibility and domain of Member States. However, several policy initiatives and common reference tools have been developed at European level to support national reforms. These include a framework of key competences needed for the knowledge society, the European qualifications framework, Europass, the European credit transfer system, the lifelong learning programme (of which the study visits is part), and others.

To monitor progress of the Union and Member States towards the objectives, a system of European education quality indicators and benchmarks is used. Member States produce national progress reports every two years which form the basis of a joint report by the Council and the Commission.

By 2006, countries should have developed “cradle to grave” lifelong learning strategies covering all sectors and levels of education and training. Education and training in Europe was to become a quality reference for the whole world.

Learning from one another and exchanges of good practice is one of the main tools of cooperation and moving towards high quality education and training in Europe.

More information can be found at:

[http://ec.europa.eu/education/lifelong-learning-policy/doc28\\_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc28_en.htm)

Figure 3.

### *Copenhagen process*

Signed in 2002 in the wake of the Lisbon strategy and cooperation in education, the Copenhagen declaration was the starting point for closer cooperation between the Commission, Member States and European social partners in vocational education and training (VET). VET plays a key role in ensuring lifelong learning and supplying a skilled workforce necessary for a competitive and dynamic economy.

With the goal to improve the quality and attractiveness of VET and raise its profile among other fields of education, the following priorities were defined:

- give VET a European dimension (improve cooperation between institutions and promote mobility);
- make VET more transparent and improve information and guidance (develop a credit system to make learning outcomes of VET portable, strengthen policies, systems and practices for lifelong guidance);
- promote recognition of qualifications and competences (develop a single framework to help translate qualifications and competences and make them more transparent, support development of qualifications and competences in economic sectors; develop common principles for validation of non-formal and informal learning);
- develop quality assurance in VET (including attention to learning needs of teachers and trainers).

As VET is the responsibility of Member States, work on common tools and reference levels, which help to implement reform and increase common trust between key players, is voluntary.

The role of the social partners in implementing the priorities has been stressed in policy documents.

The process has manifested VET's importance and triggered off significant developments. Recommendations and common principles have been developed in the areas of key competences, quality assurance in higher education and in VET, quality of mobility, lifelong guidance and validation of non-formal and informal learning. Development of the European qualifications framework has had important effects, as work on national qualification frameworks affects all education and training sectors and levels. A wide range of actors were involved in the process. They have become more familiar with and interested in joint work at European level.

More information can be found at:

[http://ec.europa.eu/education/copenhagen/index\\_en.html](http://ec.europa.eu/education/copenhagen/index_en.html)

Figure 4.

***Bologna process***

Started in 1999, before the Lisbon strategy, the Bologna process is closely linked and contributes to the Lisbon process but covers more participating countries (45 are involved).

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

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

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

More information can be found at:

[http://ec.europa.eu/education/policies/educ/bologna/bologna\\_en.html](http://ec.europa.eu/education/policies/educ/bologna/bologna_en.html)

Figure 5.

***Lifelong learning programme (2007-13)***

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

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

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

More information can be found at:

[http://ec.europa.eu/education/lifelong-learning-programme/doc78\\_en.htm](http://ec.europa.eu/education/lifelong-learning-programme/doc78_en.htm)

*Annex 2. Calendar of programme cycle*

<b>Preparing a catalogue for an academic year</b>	<b>September - January</b>
- European Commission invites NAs to propose study visits	September
- NAs invite potential organisers to submit proposals, select proposals to be published	October - November
- NAs submit proposals to Cedefop	November
- Cedefop prepares and publishes the catalogue	November - January
- Catalogue is available online	January
<b>Call for applications</b>	<b>February – June</b>
- European Commission announces a call	February
- National call for applications takes place	February – April
- Applicants apply online	February – April
- NAs evaluate and select candidates	April - May
- Formation of groups	End of May
- Participants are informed of results	June – July
- NAs distribute grants and sign agreements	latest two months before the visit
<b>Study visits take place</b>	<b>September – June</b>
<b>Assessment and evaluation of results</b>	<b>Ongoing and June – September of the following year</b>

### *Annex 3. Sample programme*

A programme should include:

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

***Annex 4. Study visit organiser's checklist***

Time planning	Action taken	<input checked="" type="checkbox"/>
July	confirmation received from Cedefop that the groups have been formed	<input type="checkbox"/>
July – August	username and password for Olive received from Cedefop	<input type="checkbox"/>
	management and colleagues informed about the study visit to take place	<input type="checkbox"/>
	organiser's team created	<input type="checkbox"/>
12 weeks before the visit <sup>(4)</sup>	hotel for participants identified and preliminary agreement made	<input type="checkbox"/>
	transport needs defined and arrangements made	<input type="checkbox"/>
12 weeks before the visit	institutions and organisations to be visited are identified and contacted	<input type="checkbox"/>
12 weeks before the visit	potential speakers are identified and contacted	<input type="checkbox"/>
12 weeks before the visit	a list of alternative speakers and institutions drafted	<input type="checkbox"/>
12 weeks before the visit	materials about the study visit sent to speakers and institutions (draft programme, description, list of participants with their professional backgrounds)	<input type="checkbox"/>
12 weeks before the visit	preliminary programme prepared	<input type="checkbox"/>
As early as possible	professional backgrounds, interests and motivation of participants studied	<input type="checkbox"/>
As early as possible	special needs of individual participants identified, if any	<input type="checkbox"/>

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<sup>(4)</sup> These times can be somewhat shorter for visits starting in September. However, organisers are encouraged to do as much as possible well in advance.

As early as possible	arrangements for participants with special needs made	<input type="checkbox"/>
10-12 weeks before the visit	participants contacted and sent an information package (see page 13-14)	<input type="checkbox"/>
6 weeks before the visit	background documentation on the theme in host country prepared and sent to participants (made available in Olive)	<input type="checkbox"/>
6 weeks before the visit	participation of speakers and host institutions confirmed	<input type="checkbox"/>
6 weeks before the visit	an informal meeting for the group on the eve of the starting day arranged	<input type="checkbox"/>
6 weeks before the visit	a draft programme sent to NA	<input type="checkbox"/>
4 weeks before the visit	reservations of the hotel confirmed by participants	<input type="checkbox"/>
1 week before the visit	final programme sent to participants and NA	<input type="checkbox"/>
Informal meeting	objectives of the visit and structure of the programme explained	<input type="checkbox"/>
Informal meeting	participants informed of the group report and invited to select a group reporter	<input type="checkbox"/>
Last day of visit	attendance certificates issued to participants	<input type="checkbox"/>
After visit	visited host institutions and organisations thanked	<input type="checkbox"/>
After visit	results of the visit disseminated	<input type="checkbox"/>
Regularly	Olive checked for any changes	<input type="checkbox"/>
Regularly	information sent to newly added participants	<input type="checkbox"/>