

## Guidelines for counselors (coach)

## for the construction and evaluation of the dossiers of the competences of local managers of the third sector

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## How to elaborate the dossier

### Introduction: the transparency of non-formal and informal competences

The proof of the learning acquired in formal education is represented by the qualifications, diplomas, credits issued by educational institutions.

In the case of the validation of the competences acquired in non-formal and informal contexts, particular care is needed in the transparency of the competences, so that the criteria of reliability, validity and quality assurance are met <sup>1</sup>.

Transparency of the competences acquired requires two related actions:

- a) the construction of a logical argument;
- b) the identification of evidence to support the argument.

The logical argument must relate to each of the competences that you want to demonstrate. It must: indicate in which experiences that competence has been acted; describe the way in which the person has actually acted; list the documentary evidence of the experience carried out.

More analytically, an argument should follow a logical thread like the following:

- 1. I master competence *x*
- 2. ... by exercising it in carrying out the activity (s) y in which I act so and so ...
- 3. ... activities that I carry out in this given context ...
- 4. ... since this time ...
- 5. ... with this level of autonomy and responsibility ...
- 6. ... with this ability to identify and manage problems.
- 7. And all this is demonstrated through the following Evidence
  - Prove that the activity of step 2 was actually carried out
  - Prove that I act effectively.

### Dossier construction in the Trello platform

In the experimentation of the IMAGES project, the method adopted to write this argument is found in the Trello platform, used to build the Dossier.

The manager who participates in the process of identifying his/her competences will choose which areas of competence he/she believes he/she has gained and, therefore, which areas he/she wants to describe to demonstrate their exercise.

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<sup>&</sup>lt;sup>1</sup> Cedefop (2015), Guidelines for the validation of non-formal and informal learning.



In the Trello platform, each area of competence corresponds to a column. The column contains 5 detail cards, in which to enter the following information:

- a) Describe the main activity in which you have used this area of competence;
- b) Where did you carry out the activity described above?
- c) For how long?
- d) Did you carry out the activity independently?
- e) Did you encounter any problems in carrying out the activity? How did you solve them?

In addition, the documents constituting the evidence will be attached to the general card of the column. Each column also contains a sixth card ("Other experiences") in which you can freely describe other activities in which you use or have used the competence.

Let's see in detail how to fill in the different forms.

### a) Describe the main activity in which you have used this area of competence

In this space I have to choose an activity in which I believe to use the competence we are talking about in a very significant way. It can be a past activity, but it's best if it's a recent activity. It is important to describe the activity in an analytical way, without taking anything for granted, as if I had to explain it to a person who does not know the context in which I am engaged. It is good to indicate which components of the competence I implement (which knowledge, which skills, which attitudes) among those indicated in the Repertoire of competences of the local manager, specifying how I act them concretely.

It is important, at this stage, for the counsellor to help the beneficiary reflect on the different components that can be activated when exercising a certain area of competence (reference can be made to what has been discussed regarding the table "*My chose competence (s) to recognise (part 2)*").

### b) Where did you carry out the activity described above?

Here it is important to indicate in detail the context in which I acted (including information such as the name and address of the organisation). Is it a small or large organization? With few or many services, projects or activities? How many people work inside? Are they workers or volunteers? Does the organization operate in a large city or a small town? Does it have one or many offices? All this serves to make people understand the level of complexity in which I carried out the activity I described above and I acted the competence I am declaring.

#### c) For how long?

In this card I have to provide information on the duration of the activity. How long have I been doing it (or, how long have I been doing it)? It is not enough to indicate only the beginning and the end, it is also important to make it clear with what intensity I commit my time in the activity: every day, a few days a week ... It is essential that the activity has been carried out <u>for a period of at least three years</u>.

### d) Did you carry out the activity independently?

Since competence is described in terms of responsibility and autonomy, I have to make people understand how much autonomy and independence there is in my activity. Do I act alone? Do I act in a group? Do I follow the instructions that others give me or do I decide for myself what is good to do? Do I coordinate the work of others? ...

#### e) Did you encounter any problems in carrying out the activity? How did you solve them?

Each activity poses problems and competent action is expressed precisely in knowing how to identify and deal with problems. In this card it is necessary to explain what are the main problems that I encounter in the activity I am describing and what are the strategies I adopt to face and solve them.





#### f) Other experiences

The last tab is not about the main activity I am describing. In this sheet I can describe other activities that I do or have done, in which I have used the same competence. The text is free, but it is always good to adopt a logical sequence similar to the one seen above.

### The evidence

For each area of competence, it is mandatory to attach evidence.

The evidences are documents of various kinds and with different proof values.

Evidence is one of the elements of the argument that "demonstrates" competence. They "anchor" the description to verifiable facts.

They can be of three types:

- a) documents proving that the manager actually carried out the activity described (eg: report of appointment or election to a certain role, employment contract, certificate of studies, photograph of the applicant in a certain situation ...);
- b) proof that the manager has carried out that activity effectively (e.g. certification of merit, email of appreciation, list of approved projects, confirmation of a certain assignment, press article referring to the activity, exchange of messages with users / colleagues / bodies ...);
- c) an "artifact", that is a material or intellectual product created by the manager (eg: report held in an assembly, elaborated technical or political document, video recording of an activity carried out, constructed object...).

The form of evidence can be the most varied. This can be written documents, photographs, videos, links to web sites, smartphone screenshots, etc.

Evidence must be chosen carefully. In particular, they must be *relevant* and *sufficient* with respect to what is intended to be demonstrated. For example, if I want to demonstrate competence in human resource management, I cannot just show that I am the president of my association, as a president does not necessarily manage people. I need to find more explanatory evidence.

It may also happen that the manager does not have proof of the performance of some activity. In these cases, however, you can ask a representative of the association or others for a letter of attestation.

The three types of evidence described above (proof of doing, proof of efficacy, artifact) can be considered of progressively greater value. Attesting that an activity has been carried out effectively is more than simply proving that it has been carried out; showing an effective product of your business can be more than having a proof of effectiveness.

What makes one evidence (or set of evidence) *sufficient*? There is no absolute rule. In some cases, a single piece of evidence is sufficient to complete the argument, in other cases it is necessary to strengthen the reasoning with additional evidence which - considered as a whole - makes the picture more evident. What matters is that the evidence accompanying a competence makes it possible to make it recognizable to a third party "beyond any reasonable doubt".

It is important to consider, however, that this does not mean that the only acceptable evidence is certificates, public attestations, or documents with similar "probative force". It should be remembered, in fact, that the "proof" of a competence is not given by the evidence itself, but by the set of arguments proposed, supported and accompanied by evidence.

#### An example of a dossier

Here is an invented example of an argumentation of a competence, referring to the "Management competence".

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#### a) Describe the main activity in which you have used this area of competence

I exercise managerial competence in my role as president of the association 'Wings to fly', which promotes youth work and education activities. Within the association, I am in charge of coordinating the board of directors and in doing so, I enhance the skills of each member and foster an atmosphere of cooperation, using both my interpersonal communication management skills and my listening and motivation skills, as well as my attitudes of empathy and enthusiasm. To achieve these goals, I also greatly value my in-depth knowledge of the association's history and values, my ability to share the association's vision, as well as my ability to use discussion facilitation techniques.

In addition, I am responsible for stimulating and coordinating the definition of the association's strategic lines, liaising with public institutions, and identifying sources from which to draw economic and instrumental resources to achieve the objectives.

My duties also include the management of democratic processes, including the convening and coordination of the members' assembly, as well as the control of accounts and finances.

#### b) Where did you carry out the activity described above?

The 'Wings to Fly' association has existed since 2001. It currently has 200 members and carries out activities for over 600 target groups (high school and university students). It is headquartered in Rome (in the 'Tor bella monaca' district, but its activities also take place in the municipalities of Guidonia, Tivoli and Frascati.

Approximately 80 per cent of the members work as volunteers and dedicate a few hours per week. The remaining part of the members ensures continuous activity and is distributed over the different areas of the organisation: youth group animation; planning and development; studies and research; administration.

#### c) For how long?

I have been president of Wings to Fly since 2015. I carry out the activities associated with this role three days a week, with a commitment of at least five hours each time.

#### d) Did you carry out the activity independently?

As president of Wings to Fly, I act autonomously. However, I am convinced that the development of the association requires that I fulfil my role in a participative manner. Therefore, I often involve other board members in the preparation of activities that are under my responsibility.

#### e) Did you encounter any problems in carrying out the activity? How did you solve them?

The problems you have to deal with as president of 'Wings to fly' are many, but two are the most frequent types: the difficulty in dealing with public institutions and conflicts between the people working in the association.

In the first case, the resolution strategy that I most frequently adopt concerns dialogue with those in charge of the institutions. In particular, I strive to make it clear to them what objectives can be achieved if public institutions collaborate with associations. But in some cases, empathy also becomes a good strategy.

Regarding internal conflicts, conflict management skills, which I apply on the basis of my studies, work a lot.

1. Minutes of the 'Wings to fly' members' meeting of 01/03/2015 at which I was elected president of the association. (link to the doc)

Minutes of the members' meeting of "Wings to fly" on 15/03/2019 in which I was confirmed as president of the association. (link to the doc)
 Report signed by me on the activities of the association, presented at the members' meeting on 15/04/2020 and approved by the participants.

(link to the doc) 4. Interview I gave to the local newspaper "Voce di Roma" (published on 10/12/2021) in which I describe the association's activities. (link to

the doc) 5. Exchange of emails with the councillor for youth policies of the municipality of Rome (February - May 2022), in which we discuss the

5. Exchange of emails with the councillor for youth policies of the municipality of Rome (February - May 2022), in which we discuss the relationship between the association and the municipal institution. (link to the doc)

6. Memorandum of understanding between the municipality of Rome and the association 'Wings to fly' (signed by the mayor and myself) for youth work activities (06/06/2022). (link to the doc).

#### f) Other experiences

I also exercised managerial skills in a previous experience, in which I was a member of the board of directors of the association 'Verso il futuro', which is committed to raising public awareness on environmental issues.

The association 'Towards the future' is a small organisation in the municipality of Frascati, consisting of 15 members, all volunteers.

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## Evaluation of dossiers and validation of competences

Each partner sets up a 'National Commission', composed of its evaluators. The National Commission evaluates the dossiers in their mother tongue and formulates an evaluation proposal for each dossier, using a specifically prepared grid (the "Dossier evaluation form").

The evaluation proposal is discussed and ratified by a "Transnational commission", composed of all the partners and chaired by the project leader.

More in detail, the evaluation will take place in three phases:

- a) evaluation by an evaluator and drafting of an "Evaluation proposal". The evaluator is thoroughly familiar with the language of the manager and the cultural, social, economic and institutional context of the country in which the manager works. The evaluator of a dossier is chosen by the national partner and must be different from the person who accompanied the manager as a coach;
- b) bilateral meetings between each national commission and the team of Roma Tre University, in order to discuss the evaluation proposal;
- c) confrontation with the whole commission and decision on the validation of competences. If necessary, the Commission may request an interview with the manager in order to clarify specific aspects of the dossier.

The evaluation can have 3 different outcomes:

- 1) Validation of all the competences declared by the manager;
- 2) Partial validation (some competences are validated and others not);
- 3) Rejection of the application (no competences are validated).

The evaluation of a dossier takes place by examining, one after the other, each area of competence proposed by the manager.

The questions to which the evaluator answers are the following:

- a) Is the activity described consistent with the declared competence? So, is it evident that in order to carry out the activity described it is necessary to implement that competence?
- b) Is the activity described clearly and completely? Are the components of competence (knowledge, skills, attitudes) that the manager must use to act competently evident?
- c) Is the activity described relevant for the purposes of mastering the competence? So, was the activity carried out in a sufficiently broad and complex context? Was it carried out for a period of at least three years?
- d) Did the manager act with a sufficient level of autonomy and responsibility in this activity?
- e) Has the manager described what problems he/she faces in carrying out the activity? Are the strategies adopted adequately described?
- f) Are the evidences relevant (does they actually relate to the activity that has been described)? Are they sufficient (do they show that the activity has been carried out and has been carried out competently)?

In the event of a positive evaluation, the Transnational Commission issues the manager with a "Validation Document" indicating the areas of competence that have actually been validated.

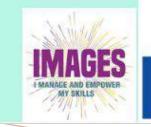


Third-sector managers' competences

Identify and enhance the competences acquired in the course of a professional and volunteering career

## Accompanying process Handbook









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## The structure of the accompanying process (20h)



**STEP 1** : Information and guidance on the procedure

> Sequence 1 – Collective presentation of the support process (3,5h)

**STEP 2:** Identification of competences

Sequence 1 – The manager's biography (2h) Sequence 2 – the grid of general experiences (managers' inter-session work + 2,5h presentation to the coach) Sequence 3- Identification of the competences to enhance (3h)

## STEP 3: Documentation of competences

Sequence 1 - Creation and presentation of the Trello (or other) tool and presentation of the structure of the portolio (2h)

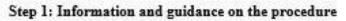
Sequence 2 - Collection fo supporting documents (managers' inter session work + 5h verification by coach)

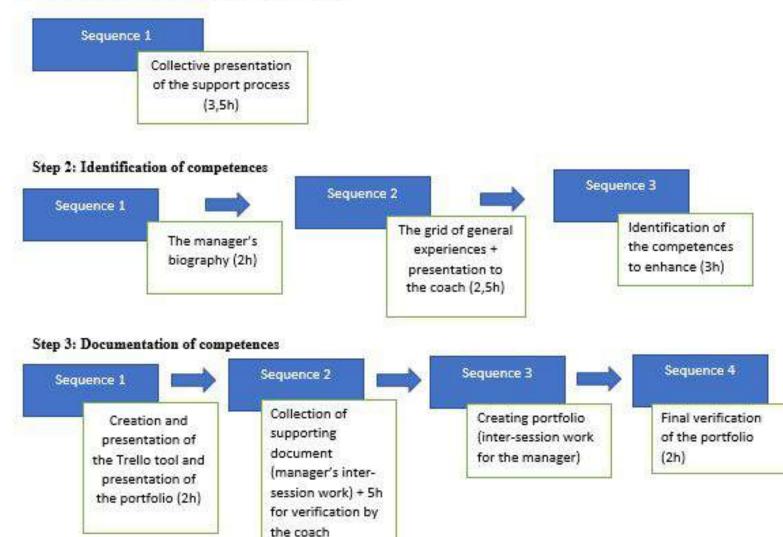
Sequence 3 - Creation of the portfolio (managers' inter session work)

Sequence 4- Verification of the portfolio (2h)



## Sequences of the accompanying path







## STEP 1 : Information and guidance on the procedure

Sequence 1 - Presentation of the support process - face-to-face, 3.5 h

## **Objectives**:

- Identifying all the support steps
- Defining a common work framework Content of this work sequence :
- Presenting the different work steps
- Presenting the tools
- Setting up a provisional calendar



## STEP 2 : Identification of competences

Sequence 1 – The manager's biography – 2h (virtual)

## **Objectives :**

 Through a narrative approach, collect all the manager's experiences in all phases of his/her life (work, volunteering...)

## Content of this work sequence :

- Semi-structured interview to collect the manager's needs 1,5h
- Presentation of the grid of general experience 0,5h







## Biography grid

	Examples of questions	Remarks / Answers
General	In what sector of activity is the association in which you work?	
Questions	What is your main activity?	
	What knowledge do you have of the non-profit sector?	
	Why do you work in the non-profit sector?	
	What do you expect from this accompanying process?	
	What are the major experiences and events that have marked your life/your career?	
Trainings	Can you tell me about your background, your training?	
	What is the last training you followed?	
	What is the training/adventure that made the most impression on you?	
	What did these trainings bring you?	
Professional	What were your most significant professional experiences?	
experiences	How long did you stay there?	
	What do you think you gained from them?	



## Grid of general experiences

Name of the organisation	Status	Mission(s)	Tasks	Context	Difficulty(jes) encountered	Means implemented	Results obtained	Type of experiences	Duration of the experience
Host organisation	Job title	The specific assignment(s) you have been given	Work done to complete your mission	Circumstanc es in which you have used your skills	Obstacle(s) that emerged during your work/volunteering experience	Solution(s) implemented to overcome the obstacle(s)	Impact of the actions carried out	Professional or volunteering experience?	
Association "XXX"	President	To ensure the smooth running of the association	Recruiting of new staff	During a specific context	Due to the lack of staff, it was necessary to recruit more staff	Reinforcing recruitment through the improvement of xxx	More than 5 people recruited	Volunteering	3 years
Other activities (fa Name of the	mily, free ti Status	i <mark>me, political ac</mark> Mission(s)	<mark>tivity, othe</mark> Tasks	r jobs) Context	Difficulty(ies)	Means	Results	Type of experiences	Duration of the
organisation Host organisation	Job title	The specific assignment(s) you have been given	Work done to complete your mission	Circumstanc es in which you have used your skills	encountered Obstacle(s) that emerged during your work/volunteering experience	implemented Solution(s) implemented to overcome the obstacle(s)	obtained Impact of the actions carried out	Professional or volunteering experience?	experience



## **STEP 2 :**

## **Identification of competences**

Sequence 2 – The grid of general experiences face-to-face, 2,5 h face to face

## **Objectives :**

 Inventory and formalization of all the working and volunteering experiences of the manager

## Content of this work sequence :

Filling in the general experience grid



# STEP 2 :

## **Identification of competences**

Sequence 3 – Identification of the competences to enhance – 3h (virtual)

## **Objectives** :

- Identify with the association manager the category(ies) of skills/competencies, he or she wishes to evaluate and enhance
- Auto evaluation on the level of acquisition of the selected competence(s)

## Content of this work sequence :

- Filling in the grid of my chosen competence(s) to enhance part 1 (1,5h)
- Filling in the grid of my chosen competence(s) to enhance part 2 (1,5)



## 1) My chosen competence(s) to recognize (part 1)

The 6 main skill categories from the	Importance	Why?
Repertoire	1-(Very) Important to you	(Explain why this competence is important to you?)
	2-Not (very) important to you	
Management competence		
Leadership competence		
Personal and social competence		
Networking competence		
Change management competence		
Communication competence		

## 2) My chosen competence(s) to recognize (part 2)

Management competences				
Have you ever (Please insert knowledges, skills of attitudes from the Repertoire that you think you master)	<b>Examples of associative experiences</b> (professional and/or volunteering) Refer to the grid of general experiences			
White a short comment How many resources do I recognize having Are they significant enough to suggest that				

Insert a new table for a new competence category where applicable

## STEP 3 :



## **Documentation of competences**

Sequence 1

Creation and presentation of the Trello tool and presentation of the portfolio structure (2h, face-to-face)

Sequence 2 Collection of supporting documents / manager and coach inter-session work (5h, virtual)

Sequence 3 and 4 : Creating the portfolio / coach inter-session work Verification of the portfolio (2h face-to-face)

## **Objectives :**

Presentation of the collaborative tool and the portfolio

## Content of this work sequence :

- Identify evidences (supporting documents) for the acquisition of competences
- Collection and verification of evidences
- Common validation of the portfolio between the coach and the manager

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<sup>™</sup> Tableau ✓ IMAGES portfolic	🏮 🏫 Laura Ligue 🖄 Visible par l'	espace de travail SK 📭 🕹 Partager	∮ Automatisation  √ Power-ups	≂ Filtre ····
Methodology ····	Example of main competence to … enhance	Example of main competence to … enhance	Example of main competence to … + Ajoutez	
Rules of utilisation of the trello between the coach and the manager	Management competences	Leadership competences	Communication competences	
+ Ajouter une carte 🛛	Describe some activities in which you used the competence (please chose	Describe some activities in which you used the competence	Describe some activities in which you used the competence	
	one main relevant experience)	Where did you carry out the activities described above? Indicate the	Where did you carry out the activities described above? Indicate the	
	described above? Indicate the clean clean clean clean clean context (role, structure, location) © cleanly and in detail ■ For I	context (role, structure, location) clearly and in detail ©	context (role, structure, location) clearly and in detail	
		For how long? Indicate the time span of the duration of the	For how long? Indicate the time span of the duration of the activities/experiences (from-to)	
	For how long? Indicate the time span	activities/experiences (from-to)	Did you carry out the activities	
	of the duration of the activities/experiences (from-to) ≣	Did you carry out the activities independently? Did you understand on your own what you needed?	independently? Did you understand on your own what you needed? (short description)	
	Did you carry out the activities independently? Did you understand on your own what you needed?	(short description) Did you encounter any problems in	Did you encounter any problems in     carrying out the activities? Did you	
	+ Ajouter une carte	+ Ajouter une carte	+ Ajouter une carte	



## **Declaration document**

of competences acquired in non-formal and informal contexts related to the repertoire of competences of the local third sector manager

#### Edited by

Surname	Name
Place of birth (City, Country)	Date of birth
Nationality	Tax code

#### With the coaching support of:

Surname	Name	Organisation

This transparency document has been edited within the European project I Manage and Empower my Skills – IMAGES, financed by the Erasmus plus program.

Date of the transparency document \_\_\_\_\_\_

Sign of the coach \_\_\_\_\_

#### Competences that the manager recognises:

(mark with an 'x' the recognised competences)

1. MANAGEMENT COMPETENCE
Management competence involves planning and structuring one's tasks, as well as a multitasking approach. It is necessary to know how to manage human resources (to coordinate, supervise, motivate others and setting a good example oneself)
both employees and volunteers, as well as manage projects and control the budget. It includes the ability to have an overall
vision and orientation to the future, coherently with the mission and vision of the organisation.
2. LEADERSHIP COMPETENCE
It is the ability to guide, stimulate, involve others by encouraging participation in the life of the organisation.
It presupposes the ability to act as a reference point for other people, both as an example to follow, and as a final
decision-maker, or mediator, regarding the choices to take. The leader has an overview of the context in which he/she
operates and the mission of the organization to which he/she belongs.
3. PERSONAL AND SOCIAL COMPETENCE
It is about the ability to effectively manage oneself and the relationship with others. It includes the approach of the



## **IO3 process evaluation guide**

#### **Questionnaires for managers**

Two questionnaires will be administered to each manager participating in the competence identification and transparency process:

- Questionnaire 1 (at the end of the initial information meeting)
- Questionnaire 2 (at the end of the last accompanying meeting, after the construction of the dossier)

To guarantee the anonymity of the answers, the procedure is as follows:

- 1) Each partner compiles a list of the accompanying managers and assigns a unique code (e.g. BUP001, BUP002...). *Please, download the file "Coding of managers" and use it offline in your organisation;*
- 2) When filling out Questionnaire 1, the coach indicates the unique code to the manager and the manager enters it into the first answer of the questionnaire;
- 3) When filling out Questionnaire 2, the coach repeats the same unique code and the manager enters it in the first answer.

When Roma Tre processes the data of the questionnaire, it will be able to link the answers of the first questionnaire with the answers of the second questionnaire, but it will not know the names of the managers.

The partner, who knows the code assigned to each manager, will not be able to access the individual questionnaire data, but can only examine the aggregated data.

#### Questionnaire for the coach

An evaluation questionnaire will also be proposed to the coaches, to evaluate the experience from their point of view. The questionnaire will be administered at the end of the course.



## Validation document

## of competences acquired in non-formal and informal contexts related to the repertoire of competences of the local third-sector manager

## The Transnational Validation Commission

- established on 10 May 2023 within the framework of the project I Manage and Empower my Skills - IMAGES, project code *PROJECT CODE 2020-1-IT02-KA204-079763*, funded by the Erasmus plus programme,
- composed of representatives of the project partners and chaired by ARCI APS in its role as project leader;

taking note:

- of the evaluation activity carried out by the National Commission set up in \_\_\_\_\_(country) at the partner \_\_\_\_\_\_(organisation name);

examined:

that

- the evaluation proposal drafted by the National Commission;
- the Document of Declaration of Competences signed by the candidate at the end of the accompanying pathway for the identification and transparency of competences,
- the competences portfolio with supporting evidence, drawn up by the candidate;

## ATTESTS

Name and Surname	
Place and date of birth (City,	
Country)	
Nationality	

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### has achieved validation in the following areas of competence

(delete non-validated areas)

### 1. MANAGEMENT COMPETENCE

Management competence involves planning and structuring one's tasks, as well as a multitasking approach. It is necessary to know how to manage human resources (to coordinate, supervise, motivate others and setting a good example oneself) both employees and volunteers, as well as manage projects and control the budget. It includes the ability to have an overall vision and orientation to the future, coherently with the mission and vision of the organisation.

### 2. LEADERSHIP COMPETENCE

It is the ability to guide, stimulate, involve others by encouraging participation in the life of the organisation.

It presupposes the ability to act as a reference point for other people, both as an example to follow, and as a final decision-maker, or mediator, regarding the choices to take. The leader has an overview of the context in which he/she operates and the mission of the organization to which he/she belongs.

### 3. PERSONAL AND SOCIAL COMPETENCE

It is about the ability to effectively manage oneself and the relationship with others. It includes the approach of the individual in expressing his commitment and involvement within the organization, which is also reflected in spurring other members to act and evolve. Important are the flexible approach to the different situations that arise, the willingness to learn and an inclination to work in a team. It includes the ability to know how to manage stress to face daily activities and to transmit serenity.

### 4. TEAMWORKING AND NETWORKING COLLECTIVE COMPETENCE

It is the ability to promote the cooperation of the work of one's own association with other territorial realities, national and international, to act more efficiently, for the development of the local community, to share knowledge and resources. It requires being able to interest people, know how to present one's work, to find synergies and common goals, to establish and maintain contacts, to build relationships

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## 5. CHANGE MANAGEMENT COMPETENCE

It is the ability to experiment, test, evaluate, innovate. It provides for adaptation to the daily but also to the chosen direction; the manager stimulates the creativity of the teams, leading to new ideas and changes, guides and regulates the change of volunteers and employees in compliance with the defined objectives and the general framework.

## 6. COMMUNICATION MANAGEMENT COMPETENCE

It is the ability to communicate with others and to transmit messages and information. This requires a certain mastery of the different types of media, as well as the ability to make understandable what you want to share. An organisation's manager must take into account both internal communication and external communication.

Date of the validation document

Sign of the Chair of the Commission

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