



Education and Culture

Leonardo da Vinci

**REFLECTIVE QUALITY DEVELOPMENT
FOR CVT TEACHERS AND TRAINERS
THROUGH SELF-EVALUATION**



FIRST COUNTRY REPORT

(PORTUGAL)



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(03/2006)

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1 Overview

1.1 Role of Quality Management

The importance given to quality in this last decade was huge, because institutions do not want to produce products or a service without quality, in this sense we understand the concept of quality management as “*an organisation strategy and method of management, which involves all employees and seeks to improve continuously the efficacy of an organization regarding customer satisfaction*”(Zúniga; 2004: 9). Therefore the quality management has to have some instruments that regulate the organizations and companies. The regulation of quality standards began in the manufacturing industry.

All enterprises and organizations are conscious of the important fact of quality; consequently the certification of quality management became essential to them. When quality becomes part of procedures in companies this should imply a change of attitudes and behaviours. The valuing of human resources is most important in this context and only in this sense the organizations gain the success and productiveness they want. To guarantee the quality of their standards ISO (International Organization for Standardization) 9000 established standards to assure and improve quality. ISO “obliges” the companies and organizations to provide some standards which have some effects in structure and relations: satisfaction of clients, work environment in a team, solving problems, improvement of the internal processes, decisions based in facts and data, involvement of everyone that works inside and with the organization... To certify this kind of quality management it is necessary that an organization assures the principles required by ISO which is why an entity at national level was formed to certify these standards. The Portuguese Institute of Quality (IPQ) is responsible for the development of standards, metrology and qualification activities as well for the management and support of work programs in collaboration with other institutions and countries in the area of quality. The IPQ is the entity that regulates, coordinates, manages all issues concerning quality and is also in charge of the development of the Portuguese System of Quality (SPQ).

1.2. Role of Quality Management in the Educational Sector

The success of the ISO 9000 applied to industries which spread out through others sectors of society. One of these sectors was the education sector where the implementation of ISO's 9000 began at the beginning of the last decade. ISO 9001 and 9002 are concerned with issues of education and training, referring to the Quality Systems as a model for quality assurance in design, development, production, installation and servicing". The second ISO conglobates the part of design. The initial ISO 9000 was replaced by the ISO 9000:2000 that is based on a process management and gives importance to customers' satisfaction and to the enterprise-customer relation ship". The quality management in education has to combine the four ISO standards: Quality in the organization (ISO 9001:2000), quality in the educational institution (ISO 9001-1994), quality in the personnel training process (ISO 10015:1999), quality in the process of the certification of persons.

Another way of seeing quality management is through the features of the products of the vocational education and training, here through measurable results e.g. statistical analysis of indicators, income, evolution in labour market, performance of employers according to their training, impact of evaluation. It is though important that we never forget the objectives and the values of those who are also involved when quality is measured: the society and the labour market contractors/entrepreneurs.

In the area of our survey we have another institution which is concerned with quality, the "Institute for Quality in Training (IQF)". Its main activity is to certify entities which have the capacity to provide courses for training or promote activities in this area. Another training organization that is responsible for education and training is the "Institute of Employment and Vocational Training (IEFP)", which depends on the "Ministry of Employment and Social Security". The "Vocational training System in Portugal" is framed by the "Education System of the law of Bases" which can distinguished by two types of training: vocational training inserted in the education system and professional training inserted in the labour market. The first depends on the "Ministry of Education" and the second on the "Ministry of Employment and Social Security".

1.3. Cultural and System-Related Perception of Quality Management

1.3.1. Cultural and System-Related Perception of Quality Assurance

To assure quality in education and training were created a series of mechanism and instruments to regulate this area and institutions at governmental level which try to assure the quality in the sector of education and training. For this reason a series of regulations and procedures guarantee quality. The “Institute of Employment and Vocational Training (IEFP)” certifies the issues related with training. In the scope of this organization the “National system of Professional Certification” was created. The aim of this system is the certification of all competences of practitioners/trainers and the way they obtain their training. Teachers aim to receive the “Professional Certificate of Aptitude (PCA)”, which will be explained in the following.

The guidelines for the professional performing of trainers are outlined in a handbook characterizing the performances and principles which should be adopted by these. This handbook was developing by the IEFP. Another governmental organization which plays an important role in training and is also like IEFP related to training, the “General Direction of Vocational Training (DGFV), is even more focused on the recognition, validation and certification of the competences of in adult education and training.

The ISO 10015-2002 focuses on the “Management of Quality” and provides guidelines for training with the aim of giving guidance to organizations even from the beginning of the training process. Its aim is to analyse and identify the needs for training until they are achieved and focuses also on the improvement of training.

Education is the task of the “Ministry of Education” and consequently the schools and the teachers have to fulfil the ministerial procedures and rules. Quality assurance became more and important in Portuguese schools and with it the certification of teachers and schools.

1.3.2. Cultural and System-Related Perception of Self-Evaluation

The actors in training/education courses are prepared to evaluate the process as well as themselves. Therefore evaluation “should be used to denote all those actions which serve enhance the degree of reflection before or during the learning situation”(Stahl: 1998; 33). Evaluation methods and procedures have become usual in organizations but its several forms, times and by internal or external staff vary of course to a big extend. It is though always intended to find out if the training/education achieved its aims and goals as well as the results which were actually achieved in the participating process. Self-evaluation even requires more involvement because a person needs to evaluate himself, his activities and his performance towards others. The capacity to evaluate ourselves has to be develop in continuous way. Therefore organizations should participate in the process of self-evaluating their actions and activities, too.

1.3.3 Cultural and System-Related Perception of Self-Empowerment

The concept of empowerment puts a new way of thinking and acting to work relationships because it defines responsibilities and delegates’ authority to the employees and their team work while at the same time adding more autonomy to their actions. The participant is involved in his process so more dynamism towards changes are possible and finding solutions for problems. The idea of empowerment is reaching and spreading in organizations because more efficiency and an increase of quality towards outcomes is related to it.

The self-empowerment of a person (e.g.trainer), involves the individual perception of his responsibility, authority and participation. In education and training, self-empowerment could be decisive to obtain quality assurance since it is part of a guidance system in some organizations, but in some cases only on a theoretical basis.

2 Survey

2.1 Cultural and System-Related Requirements for Self-Evaluation in Further Education and Training

In order to understand the cultural and system-related requirements for self-evaluation that are being used or needed to be implemented in CVET institutions, semi-structured interviews were prepared that were applied to the following actors/experts in CVET:

Stakeholders; Practitioners; Participants

The interview guides were prepared according to different actors/experts. Therefore not all interview guides were equal and were also prepared to take into consideration the following aspects, defined in the project proposal:

Dimensions of Quality Development:

Levels of the integration of the quality development approach;

Standards used;

Requirements for Quality development;

Dimensions of Self-Evaluation:

Levels of Self-Evaluation (Evaluation).

Standards for the interactivity of the instruments;

Requirements and needs for Self-Evaluation.

The interviews were analysed using this content analysis approach and the main results, according to established criteria which are mentioned in the following chapters.

2.2 Perception of Quality Concept

2.2.1 View of Practitioners

Practitioners mentioned that they see the focus on quality because it increases the efficiency of the training systems which are funded. They also mentioned that the focus on quality is concerned with the improvement of the teaching/learning processes, performances of trainees and trainers, preparation for trainees to move into working life and in some cases the improvement of new competences. To gain quality in training/teaching it is necessary that more focus is given to the contracting of trainers, to their need to accompany their actions as well as to results of evaluation and the impact of the training in the surroundings of work places and work contexts.

One trainer stated that the quality issues are reduced to economist motives, because trainers usually are not hired for their professional qualifications any more but more often but because organizations hire the cheapest work force.

When quality improvement is in the focus of the teaching/training performance, we observed an improvement in work relations, communication processes and learning processes of participants. The performance of the practitioners has the purpose to give skills and competences to participants/students and change behaviors and attitudes with the intention to improve or define their professional future. Therefore teachers and trainers need to combine the idea of quality with the improvement of their performance. The trainers should not only improve their work regarded preparations (resorting diversified methodologies and techniques as well as various teaching materials resources, contents sets suitable the training subject...), but also their activity as a mediator for learning and knowledge (posture, attitudes, behaviors).

2.2.2 View of Institutions Concerned with Quality Assurance

An important aspect towards education and training is the certification of the entire institution which is in charge of training. It is required that it is certified and offers courses that aim in their disposal at a future perspective of the participants.

In this scope quality is a growing request in some institutions taking into account guidance rules, although there are still not any rules established and defined to develop quality in some institutions/organizations. Schools can follow the guidance of “IGE Education General Inspection” but this guide has no compulsory character. Regarding this, one of the interviewed stakeholders mentioned that action plans should be compulsory.

For training there isn't a unity among the several existing training centres, though in the last several years many attempts were undergone. This is why each centre is still determined by its own particularities. But there are some similarities between centres of training in certain areas where the demand for training meets the requirements of persons which need to improve their knowledge and competences.

2.2.3 View of Experts

The training activities should reach up to best practise and quality because this is the only way to qualify people for the opportunity to integrate them into the labour market. It is important to guarantee quality in training and education because the labour market is hard to satisfy. In order to get further funding it has become necessary for institutions to design courses that can be analysed for their success in helping participants to get into the labour market. It is important to establish the link between the needs of the participants/students and the needs of the market, consequently everybody will profit from this. The participants profit from this because they went through a certified training that meet the needs of the labour market and the enterprises/organizations profit from this because they are provided with required qualified personnel. For this reason quality plays a big role in the process of training and education and some enterprises help their employed teachers and trainers with further training but in general enterprises/institutions don't give their personnel the opportunity of further training because they think that they are loosing time and money.

All of the interviewed practitioners and stake holders believed though that qualification and training of teachers and trainers are a step forward to improve the social and economic conditions of a country.

The training of quality presupposes the involvement of all actors: policy makers, managers, those responsible, practitioners, participants/students and even their own families or the community. In this sense all of them influence this process actively. The contribution has to come from everyone, principally the institutions and organizations that have to establish bounds and goals in order to develop quality. Another aspect that was pointed out by the interviewed concerns the necessity to evaluate quality in the long term and not a in the short term because processes need time and in many cases show their results only after a longer period of time as considered by funding rules.

2.3 Criteria for Quality Assurance

2.3.1 View of Practitioners

In this scope, the practitioners have to be integrated into the active improvement of quality by reflecting their work performances. The teachers and trainers should look for an increase in their performance, herewith not only in the elaboration of the actions (resorting diversified

methodologies and techniques as well as various teaching materials resources, contents suitable to the training subject...), but also in their function as a transmitter of learning and knowledge (posture, attitudes, behaviours...). Some of the interviewed practitioners mentioned that the instruments used to assurance quality were evaluation files, others used questionnaires which are filled by the participants/trainees at the end of a course regarding the performance of the teacher and trainer. These forms of evaluation were not seen as being sufficient enough. Most of the interviewed practitioners believed in a continuous dialog with the participants in order to better adapt to the training needs of the target group, planning the training to fit the specific situation participants are in as well as for the understanding of the impact training has on the target group or how the area of the course could be actively involved (what kind of population...).

Another aspect which many interviewed practitioners mentioned refers to the wish to find out about the outcomes which they have been achieving during the work with the participants and after the training has finished. Therefore it is important to find out where the participant went after haven left the course.

2.3.2 View of Institutions Concerned with Quality Assurance

Legal demands assurance quality in training and education, there are rules for the role of the trainer to perform his work tasks. The main is to have the “Professional Certificate of Aptitude (PCA)” and the inherent requirements that are attached to it. Currently, to obtain this certificate it’s necessary to attend a course of “Initial Training of Participants”. Although, there are some exceptions for which the trainers don’t need to attend this course. These exceptions concern teachers in formal education who are participating in teaching courses of universities and polytechnics. The PCA certificate has to be updated every five years. For this the teachers and trainers need to attend a specific training, the “Continuous Training of Participants” and prove that they performed in more than 300 hours. Concerning teachers in schools, nowadays only personnel with a valuable University degree are hired. In the previous years, everybody that had a university degree could apply to be a teacher in a school which is now changing in the debate about quality.

2.3.3 View of Experts

The training of quality presupposes the involvement of all actors: policy makers, managers, those responsible, practitioners and participants/students. All of them influence this process actively. The contribution has come from everyone and especially from the institutions and organizations that have to establish bounds and goals for quality improvement. Some experts in the area of training and education refer that this involvement sometimes does not exist. In the case of training centres there are consulting boards which are composed by schools, municipal entities and enterprises.

These organizations should intervene in the training process. Some schools and institutions don't collaborate and because of this don't open up all options the participants could be given.

Another aspect that was pointed out by the interviewed concerns the fact that quality improvement in education and training needs to be measured mainly in the long term because processes lead to changes and processes need time since they are very complex.

2.4 Requirements with Respect to the Target Group

2.4.1 View of Practitioners

The interview teachers and trainers pointed out how important it is to focus on the target group. The structure of a course should always be related to the target group, especially their skills and abilities, their background and their life situation. The planning of the training is very complex and it is necessary to deeply study the social, economic and cultural conditions where the training actions will be running as well as the environment that surrounds the training and education. All these factors play an important role and determinate the success or failure of a course.

2.4.2 View of Participants

Most of the interviewed participants are committed to learning and gaining new skills and competences and had a hard time to accept that others would not at all participate actively in the course. For this reason, it is very important that those responsible and planners do study their needs and meet them in order to offer courses that will have a successful outcome. The participants wished to be interviewed so their aims in life and goals would be heard as well as motivations to participate in the course could be heard. Several things need to be taken into

account when analysing the training needs of this target group not to risk a drop out: the relationship between teacher, trainer and participant should not lack communication or repeated discussions as well as the communication within the target group of the course. Furthermore it became obvious during the interviews that some of the participants only went to the courses in order to receive money.

2.4.3 View of Institutions Concerned with Quality Assurance

Trainers should have a larger availability towards their target group. In Portugal training is considered as a complementary activity to other work related activities. This results in the fact that the teachers and trainers are rarely involved in full-time teaching and training. For this reason they don't have a real perception of the reality that surrounds the training or know very little about their target group because they cannot accompany the processes participants go through. If trainers and teachers could be more available to build up a personal relationship it would be easier and more opportunity would be given to gain greater knowledge of expectations and needs of the participants and as a results of this find other solutions for the improvement of their work performance when reflecting their daily actions.

2.5 Possibility of Quality Development Through the New Self-Evaluation Tool in Further Education and Training

2.5.1 View of Practitioners

The trainer who evaluates himself in autonomous way can reveal his responsibility as trainer above of the expected. The following criteria when referring to the self-evaluation of practitioners should be taken into account:

- ▶ the relationship between practitioners and participants and between colleagues
- ▶ the teaching/learning process (here especially how participants learn best), the strategies and methods used to teach the programmatic contents
- ▶ the management of teaching and training (knowledge on methods etc.)
- ▶ the reflection on how to be a good teacher and improve ones one performance,
- ▶ the motivation of the participants
- ▶ the success, outcome of the teaching/training processes
- ▶ the possibility for participants to be involved in the training process and their own personal development

- ▶ the possibility of using alternative teaching methods

The previous criteria were considered to help trainers/teachers reflect and evaluate their own actions.

2.5.2 View of Institutions Concerned with Quality Assurance

Some institutions at education/level are defending the adoption of the hetero-evaluation, the teachers should be evaluated by their colleagues of the same teaching area or by a senior teacher because they are considered to have the ability to point out their defaults and errors as well as the positive aspects of their training/teaching performance. In this scope, the institutions that evaluate teachers are worried that the evaluation results could interfere with the acknowledgment of the colleagues and practitioners who might become less motivated. With a new tool it is believed to be possible to help institutions to understand teachers and trainers work situations better and support them in the process of self-evaluate. To fill out questionnaires is not enough feedback for trainers and a more consistent and continuous evaluation is needed, one that does not only have a look at the quantity of feedbacks.

2.5.3 View of Experts

The responsibility to use and develop a self-evaluation tool is not only placed at the level of institutions/entities, but also at the level of those who perform in and influence teaching/training. In this sense, the new tool of self-evaluation should provide a set of guidance's or establish goals for all actors in the process of developing quality. Consequently, this means to create a common structure which has to be flexible and taking into the work environment. The experts could help trainers/teachers to design a tool for self-evaluation by giving suggestions or explaining facts that have occurred in previous training situations or try to provide knowledge about good practise examples

2.6 Make-up of a Good Self-Evaluation Tool

2.6.1 View of Practitioners

For the self evaluation of their performance with a tool, practitioners would prefer the following aspects to be included:

- ▶ to be conscientious about what happens during the process of training
- ▶ to be able to reflect about the events occurred
- ▶ to reflect on how problems can be solved
- ▶ to discuss which aspects should be considered for self-evaluation
- ▶ to be able to contribute without having the fear to be criticised for their contributions
- ▶ to think about their attitudes and posture
- ▶ to exchange ideas how to develop communication processes or relationships
- ▶ to get new information about time management
- ▶ to be informed about new or available material resources which they could use
- ▶ to reflect on the societal, economical and personal aims of the training
- ▶ to reflect on evaluation outcomes
- ▶ to reflect on work relations

The practitioners have to have the capacity to listen and interpret the critics made by others only this could help them to evaluate themselves and the participants they work with. Another important aspect is also feedback which the self evaluation tool should consider. The tool could take feedback as the start point for reflection and could also mention the needed changes in our attitude and behaviour. With this list of criteria it is believed to have a good starting point for the envisaged self-evaluation tool.

2.6.2 View of Institutions Concerned with Quality Assurance

The promotion of the need of a good self-evaluation by the entities/institutions should be made in a continuous way since we speak every day about evaluation but in reality we don't do it as often as we should. To design a good tool regarding self-evaluation it is necessary to stress the importance of evaluation and this should be done not as an obligation or because it a rule to do it but it should be understood as something that is worth while to be done. In reality there is a programme with the name of Employment and Insertion Observatory on Active Life (that is to the Institute of Employment and Vocational Training), which is made in three months after the training finished but it only refers to the learning's training and to the trainees, the available information it is insufficient to withdrawn conclusions yet. But we could add that should be a good idea to use this programme or similar programme regarding the trainers, to confront them with effects of their training after sometime of its ended, for instance.

2.6.3 View of Experts

All experts mentioned the importance of using and developing a self-evaluation tool for reflection but still it has been difficult to reach a consensus. Building a tool for self-evaluation of practitioners is a step towards an improvement in training/teaching although experts consider that for this the mentality regarding evaluation has to change in order to further develop quality. Additionally the instrument needs to be more qualitative than quantitative and motivate the users to work with it by providing the free choice for evaluation. This is the basis for changing performance, attitudes and behaviours which can lead to the improvement of training/education.

3 Conclusions

3.1 Requirements on the Planned Tool

The envisaged tool can only lead to a successful development of quality if it takes into account that the professional, personnel and social characteristic of the users and their surroundings. These characteristic should be inserted in a complex frame which will be integrating the complex social, physical and geographical environment where the training or education is practiced as well as for a larger view into the educational sector. The trainers/teachers are one of the main actors in training and education and for this it's necessary to see them as part of system, to be more specific its necessary to look at their relations: participants, colleagues, institution/organization whom they work for and the society in general.

3.2 Cultural and System Specific Requirements to be Considered

During the last decade, Portugal has tried to improve the quality in teaching and training, using evaluation as an instrument for this. In this process self-evaluation played and is playing a fundamental role. It has though been difficult to implement different procedures for evaluation into the existing institutions/organizations and more specifically has it been difficult to integrate self-evaluation procedures. In training evaluation is still more meaningful than the self-evaluation. The performance of practitioners/trainers is mostly judged by the participants, evaluated by training coordinators and external evaluation teams.

The self-evaluation has to become a current practice, since it is important for practitioners and teachers to reflect more precisely on the situation and processes of teaching and learning they are in. Looking back at the own actions practitioners can withdraw those conclusions that are needed to improve the quality for future actions.

3.3 Considerations to Ensure Quality Improvement

The improvement of quality is a common target for all institutions and organizations, it benefits everyone who works and profits from education/training. If trainers/teachers do better graduate and are able to further qualify themselves than also the participants will be more motivated and will learn more, consequently their target groups will have more qualifications, competences and skills and therefore will be better prepared to face the requirements of the labour market. It can have a positive impact to design a tool that is supposed to help trainers and teachers to reflect about their performance or give them the opportunity to think about their attitude towards their profession. The envisaged tool for self evaluation is believed to contribute to and ensure a quality development.

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