



COLLABORATION CONTROL AND QUALITY MECHANISMS

D3.2 Updated as a part of D3.3

Abstract

This document defines collaboration control and quality mechanisms to be applied for the service models implemented by the ASA WGs.

0



Title Page

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1

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Table of Contents

TITLE PAGE	1
TABLE OF CONTENTS	2
EXECUTIVE SUMMARY	3
INTRODUCTION	4
1. BASE SERVICES/ ACTIVITIES	6
1.1. NETWORKING AND COLLABORATION	6
1.2. CONFERENCES AND EVENTS.....	6
1.3. FUNDING ACQUISITION	8
1.4. SKILLS ANALYSIS AND SKILLS NEEDS	9
1.5. TALENT AND SKILLS MATCHING.....	10
1.6. JOB ROLE DEFINITION AND UPDATE	10
1.7. TRAINING CREATION AND UPDATE.....	11
1.8. EXAM, CERTIFICATION SERVICES/ACTIVITIES, AND PILOT OF THE COURSE	12
1.9. RECOGNITION.....	14
1.10. DATABASE OF THE TRAINING COURSES AND SKILLS.....	14
2. ASSESSMENT PROCESS.....	16
2.1. ASSESSMENT WORKFLOW	16
3. ASSESSMENT TOOL	18
3.1. RATING SCALE AND PROCESS	18
3.2. AGGREGATED EVALUATION SHEET	19
3.3. THE ASSESSMENT TOOL.....	19
3.4. RE-EVALUATION.....	20
4. TYPICAL OUTCOMES OF THE ASSESSMENT PROCESS	21
4.1. LIST OF TYPICAL OUTCOMES.....	21
ANNEX A : ASSESSMENT PROCESS TEMPLATES	22
ASSESSMENT PLANNING TEMPLATE	22
PLANNING THE RATING OF SERVICES/ACTIVITIES IN A WG.....	22
PLANNING THE INTERVIEWS.....	23
ASSESSMENT REPORTING	23

Executive Summary

This document defines collaboration control and quality mechanisms for the activities, outputs, and services/activities implemented by ASA WGs.

A set of criteria to assess the activities and services/activities is described for each model (see annex with a separate specification of control and quality mechanism per service).

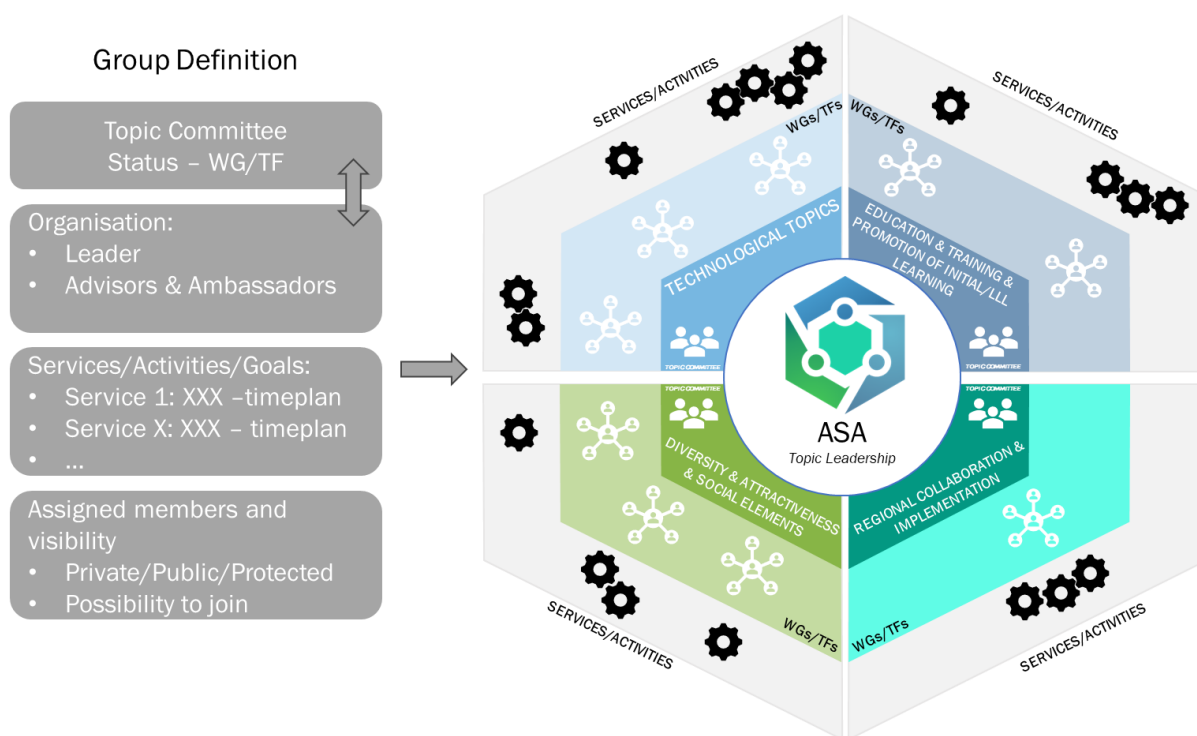
The introduction describes the ASA background the way these activities and services are being integrated into ASA, and how evaluation criteria are structured into RED (High Priority), ORANGE (Medium Priority) and GREEN (Low Priority) criteria to establish such a cooperation.

- Chapter 1 describes the assessment process.
- Chapter 2 includes a description of the assessment tool to be applied.
- Chapter 3 defines typical work carried out that ought to be maintained when applying the assessment process.

The annex lists D3.2 sub-deliverables which include specific RED (High Priority), ORANGE (Medium Priority) and GREEN (Low Priority) criteria per activity.

Introduction

The ASA structure defines working groups with different activities which the working groups establish for the Automotive-mobility ecosystem.



4

FIGURE 1: GROUP DEFINITION WITHIN THE WHOLE STRUCTURE

The below figure shows a list of activity categories (which is non-exhaustive). In this document, we describe the activity for the examination and certification (as an example). Not all activities are defined in detail (based on the current need of the groups established), this will be updated in later releases.

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2



FIGURE 2: LIST OF SERVICE CATEGORIES

The COLLABORATION CONTROL AND QUALITY MECHANISMS are based on a list of criteria which are defined per activity to be considered by the working groups when establishing a service cooperation:

- **Red** indicates high priority criteria. If they do not exist, the ASA cooperation can still be accepted but it is made transparent that they are not covered. (**High Priority Criteria**)
- **Orange:** Orange criteria have medium priority, still the ASA cooperation can be accepted but it is made transparent that they are not covered. (**Medium Priority Criteria**)
- **Green:** These criteria have lowest priority. An ASA cooperation can also be accepted based on just green criteria, but it is made transparent that red and orange criteria are not covered. (**Low Priority Criteria**)

These criteria are applied in a defined assessment process and supported by a standard assessment checklist/tool.

1. Base Services/ Activities

This section provides a list of defined services/ activities on the overall level. Each service/activity contains a general description together with possible roles defined.

1.1. Networking and Collaboration

Service/activity involves linking various sectoral stakeholders and finding cooperation, mainly in the skills agenda. This service/activity may be represented by other services/activities in this list, such as conferences, round tables, etc. The main goals of this activity/service are to connect, mainstream and join the relevant initiatives, networks or stakeholders to jointly work on the skills agenda related topics, widespread all other services/ activities to potential contributors and achieve the collaboration and PFS objectives. Outputs of the networking and collaboration may serve the ecosystem as a tangible item. The results may be, for example, the execution of the collaboration activity via the organized event, or a Memorandum of Understanding, or another form of a systematic agreement on specific actions:

Role	Activities
ASA	<ul style="list-style-type: none"> • Networking and collaboration • May link various stakeholders together • Disseminates about the networking • Facilitates the formation of new possible WG/s or Task Force/s • Accepts/Rejects and confirms the use of the ASA logo
Networked entity/s	<ul style="list-style-type: none"> • Networking and collaboration • May link entities from its network • Communicates with ASA on the possible collaboration • May participate in the possibly newly formed WG/s or Task Force/s • May disseminate info/data/details about the networking

6

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other ASA events Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA

1.2. Conferences and Events

The Automotive Skills Alliance is ready to open the necessary dialogue to establish cooperation with existing conference organizers who plan to work together with ASA and provide knowledge exchange and networking

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

opportunities. The subsequent deliverable will create a more detailed process model with highlighted activities interfacing with ASA network and partnership. ASA evaluates suitable conferences that can provide what is necessary. This detailed process model, which will be carried out in deliverable 3.2, will serve as an overview of all partners and assigned activities and is expected to make interdependencies as well as interfaces to ASA visible.

Activities that are interfacing with ASA and will be highlighted in the process model of the subsequent deliverable include, for instance:

Role	Activities
ASA	<ul style="list-style-type: none"> Evaluates conference collaboration proposal Accepts or rejects and provides confirmation to use the ASA logo Establishes a partnership with suitable conference organizers
Conference Organisers	<ul style="list-style-type: none"> Contact ASA Create Thematic Topic Communities Create Publications (SPRINGER, etc.) Create a network of industry players and research entities Submit an application mapping the criteria
Workshop Leader	<ul style="list-style-type: none"> Provides workshop committee lead.
Lead industry companies	<ul style="list-style-type: none"> Share best practices and problems.
Lead researchers	<ul style="list-style-type: none"> Share research results and case studies

7

Each role is integral to ensuring that the conference cooperation works as intended. ASA specifically evaluates conferences and organisers to establish a partnership with suitable conference organisers. This will provide ASA with the appropriate partners and a complete process model to work effectively for the conference cooperation process.

Study Visits

Services/activities revolve around the organisation of the study visits, which are events where PfS members or other stakeholders join the study visit organised by ASA or ASA members. Study visit connects various companies and other stakeholders by visiting companies or having other study programmes. This also improves the skills and competences of the participants:

Role	Activities
ASA	<ul style="list-style-type: none"> Evaluates suitable study visit proposals May organise or support the study visit initiation May be involved in the organisation Is an umbrella above the event, promotes and disseminates May link various initiatives and members, participants Informs the ASA members about the study visit and provides contacts of the organizers
Event Organiser	<ul style="list-style-type: none"> Is responsible for agenda creation and organisation of the event Facilitates the venue and other aspects of the programme Creates a list of potential participants to the events on the agenda

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

ASA Members and network	<ul style="list-style-type: none"> • May join the organisation's efforts • May support / sponsor some activities on the agenda • May attend as participants
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CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG The program includes automotive-mobility relevant contents ASA is visible as a conference partner ASA is represented through e.g: key note, workshops, papers, white papers, memberships, others The conference is recognized in automotive industry (leading automotive companies participate/contribute, leading automotive research is participating/contributing) The content is relevant for (can be mapped onto) at least one ASA Work Group
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other ASA events Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that The conference offers specific approach to ASA members, such as reduced fees The conference distributes ASA information material to attendees. The conference has a network of experts that can become members / or contribute to ASA WGs
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA The conference/event is organized by existing WG ASA members

8

1.3. Funding Acquisition

Service/activity revolves around linking PfS to various funding opportunities and information provision. Another part of the service/activity is the initiation of collective action on the submission of project applications for funding and linking possible partnerships together, all in line with the PfS objectives, mainly related to the skills agenda:

Role	Activities
ASA	<ul style="list-style-type: none"> • Evaluates a submission against criteria and provides a rating of the criteria. • Links various members for establishing partnerships • Supports in terms of know-how provision
Leader of the submission	<ul style="list-style-type: none"> • Communicates with the partnerships. • Leads the proposal submission.
ASA Members	<ul style="list-style-type: none"> • Join the effort and help with the submission



COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to/benefit a further WG Content wise and network wise alignment with ASA ASA directly or selected member as the project partner to allow effective contribution
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other ASA events Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA

1.4. Skills Analysis and Skills Needs

Services/activities revolve around executing skills analysis or other related work on the skills intelligence – this may include analysing the sector on the current needs and providing the skills intelligence to the sector or the PfS. Skills intelligence may be gathered through the organisation of webinars, surveys, or executing exhaustive desk researches. These results may develop into a structured report that the ecosystem could use:

9

Role	Activities
ASA	<ul style="list-style-type: none"> • May be a part of the analysis • May provide know-how, data or link relevant sources or entities • May promote and disseminate the results of the analysis
Analysis initiator	<ul style="list-style-type: none"> • Is responsible for the analysis execution • May involve other members of the PfS or externals
ASA Members	<ul style="list-style-type: none"> • May join the efforts
External entities	<ul style="list-style-type: none"> • May be involved on demand, such as companies, training providers, and/or others (via webinars, surveys, or to contribute to the desk researches)

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other events by ASA Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that Comparable methodology and description skills to the ASA approach Check existing materials from projects and Skills Hub among ASA network
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online



COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

Working group shares their logo back to ASA to promote partnerships with automotive working groups
 Working group members are also members of ASA

1.5. Talent and Skills Matching

Services/activities revolve around matching relevant talent and skills to the needs. This may be providing specialised equipment or linking relevant experts and learning/teaching opportunities to the stakeholders in need.

Role	Activities
ASA	<ul style="list-style-type: none"> • May provide know-how, data or link relevant sources or entities • May promote and disseminate the results of the matching
Involved Experts	<ul style="list-style-type: none"> • Are contacted to provide expertise • May involve other experts • Execute the matching
ASA Members	<ul style="list-style-type: none"> • May join the efforts
Companies	<ul style="list-style-type: none"> • May provide experts, equipment or learning/teaching opportunities • May use the matching for their employees

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other events by ASA Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that Comparable methodology and description skills to the ASA approach Check existing materials from projects and Skills Hub among ASA network
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA

1.6. Job Role Definition and Update

In the ASA Service/activity for Job Role Definition and Update, the Automotive Skills Alliance will establish cooperation with partners involved in skill set definition and update and those who plan to work with ASA on this topic.

Role	Activities
ASA	<ul style="list-style-type: none"> • Accepts or rejects and provides confirmation to use the ASA logo • Establishes partnerships with relevant partners

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

Partners in skill set and training development	<ul style="list-style-type: none"> Put together a Job Role Team Set up regular events/actions / Update Submit an application mapping the criteria
Trainers for future skills	<ul style="list-style-type: none"> Collect information from research entities & industry players Develop Skill Set Materials in Working Groups
Lead industry companies	<ul style="list-style-type: none"> Network with research entities– get to know models of research Share best practices and problems Document adequately trained staff / Upskilled & Re-skilled Workers
Lead researchers	<ul style="list-style-type: none"> Network with industry players– get to know the needs of the industry Share Research Results/ Papers

Each role is integral to ensuring that the skill set development cooperation process works. ASA specifically evaluates relevant partners to work with and establishes partnerships. This will provide ASA with the appropriate partners and a complete process model for the skill set development cooperation process.

CRITERIA

SHALL	<p>Working group has a vision</p> <p>Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG</p> <p>Mapping to Skills Hub is done, which assures e.g.:</p> <ul style="list-style-type: none"> - A declaration of coverage of the skills card in the training material - The new job role is related to a demand identified by ASA partnership <p>The job role relates to an automotive-mobility ecosystem and relevant sectors (an ASA WG)</p> <p>For new training creation, the requirements for training (based on the best practices for the training effectiveness) are complied with</p>
SHOULD	<p>Working group has a set of outcomes</p> <p>Working group is presented in workshops, conferences, or other events by ASA</p> <p>Working group has regular meetings where ASA representatives can be invited to</p> <p>Working group can establish joint vision statements with ASA and publish that</p> <p>Comparable methodology and description skills to the ASA approach</p> <p>Check existing materials from projects and Skills Hub among ASA network</p> <p>Mapping to European qualification frameworks (EQF, ESCO)</p> <p>The training results in a training certificate (therefore the Hub issues gold badges)</p>
OPTIONAL	<p>Working group has a cooperation infrastructure to share materials with ASA online</p> <p>Working group shares their logo back to ASA to promote partnerships with automotive working groups</p> <p>Working group members are also members of ASA</p> <p>Materials can be hosted on the learning platform</p>

1.7. Training Creation and Update

In the ASA Service/activity for Training Development and update, the Automotive Skills Alliance is ready to establish cooperation with partners involved in training development who plan to work with ASA on this topic.

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

Role	Activities
ASA	<ul style="list-style-type: none"> • Accepts or rejects and provides confirmation to use the ASA logo • Establishes partnerships with relevant partners
Partner in skill set and training development	<ul style="list-style-type: none"> • Put together a Training Development Team • Set up regular events/actions / Update courses • Submit an application mapping the criteria
Trainers for future skills	<ul style="list-style-type: none"> • Collect information from research entities & industry players • Develop course materials in Working Groups.
Lead industry companies	<ul style="list-style-type: none"> • Network with research entities – get to know models of research • Share best practices and problems • Document adequately trained staff / Upskilled & Re-skilled Workers
Lead researchers	<ul style="list-style-type: none"> • Network with industry players – get to know the needs of the industry • Share Research Results/ Papers

Each role is integral to ensuring that the training development cooperation process works. ASA specifically evaluates potential partners to work with and establishes partnerships. This will provide ASA with the appropriate partners and a complete process model for the training development cooperation process.

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG Mapping to Skills Hub is done, which assures e.g.: <ul style="list-style-type: none"> - A declaration of coverage of the skills card in the training material - The new job role is related to a demand identified by ASA partnership The job role relates to an automotive-mobility ecosystem and relevant sectors (an ASA WG) For new training creation, the requirements for training (based on the best practices for the training effectiveness) are complied with
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other events by ASA Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that Comparable methodology and description skills to the ASA approach Check existing materials from projects and Skills Hub among ASA network Mapping to European qualification frameworks (EQF, ESCO) The training results in a training certificate (therefore the Hub issues gold badges)
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA Materials can be hosted on the learning platform

1.8. Exam, Certification Services/activities, and Pilot of the Course

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

In the ASA Service/activity Cooperation for Exam and Certification, the Automotive Skills Alliance is ready to cooperate with existing exam and certification providers who plan to work together with ASA.

Role	Activities
ASA	<ul style="list-style-type: none"> • Accepts or rejects and provides confirmation to use the ASA logo • Establishes a partnership with relevant certifiers
Certifiers	<ul style="list-style-type: none"> • Exams organization: Exams can be organised and promoted together with the ASA • Submit an application mapping the criteria.
Training Company / Working Group	<ul style="list-style-type: none"> • Develop exam questions and mandatory exercises according to the relevant certification rules • Ensure / provide Certificate reception and distribution • Pilot the training
Lead industry companies	<ul style="list-style-type: none"> • May develop exam questions and mandatory exercises according to the relevant certification rules • May recommend to their staff to take part in the training. • Industry Exams: Exams can be organised and promoted together with the ASA TC • May pilot the training • May be the tutors
Education and training providers	<ul style="list-style-type: none"> • May develop exam questions and mandatory exercises according to the relevant certification rules • May integrate exams into their education and training: Exams can be organised and promoted together with the ASA • May be the tutors

13

ASA specifically evaluates the certifier's submission against criteria, provides a rating of criteria, accepts or rejects applications and provides confirmation to use the ASA logo. This will ensure that only suitable certifiers may provide certification under ASA, as well as providing ASA with the appropriate partners and a complete process model for the certification and examination process to work seamlessly.

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG Connection to ASA is clear and logo is not misused Certificates mapped to ASA skills and competences. Certifier shall have a clear focus and visibility in the automotive-mobility sector or relevant topics The promotion of the ASA exam and certification services/activities cooperation (web site, flyer, etc.)
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other events by ASA Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

	Skills badge interface to ASA
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA ASA cooperation is promoted on the web site

1.9. Recognition

Service/activity revolves around providing or using micro-credentials as digital badges for the ASA issues, resulting in awarding the learners with the recognition proof for their acquired competence. This service/activity also revolves around talent and skills matching by providing the tools and opportunities to find desired training opportunities and to assess skills:

Role	Activities
ASA	<ul style="list-style-type: none"> Issues the competence recognition (digital badge) via Skills Hub Provides tools to assess and search for the right training opportunity Supplies know-how and technical support for providers and new assessors
Training Provider	<ul style="list-style-type: none"> May use Skills Hub to issue digital badges to learners May contribute and support the further development of the system Promotes the system in the context of ASA
Learner	<ul style="list-style-type: none"> Receives the digital badge Promotes his competence acquisition in the context of ASA May find a suitable training

14

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG Skills badge interface to ASA and ASA badges are being implemented
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other events by ASA Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA

1.10. Database of the Training Courses and Skills

Services/activities revolve around contributing to the database of the training courses, skills and job roles, which may be used by the PFS ecosystem or, in the case of ASA, which is represented by the [Skills Hub](#). This service/activity results in the provision of up-to-date skills/job role concepts and trainings offered to the ecosystem:



COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

Role	Activities
ASA	<ul style="list-style-type: none"> • May be a part of the data integration • Maintains the database of the training courses and skills • May support the discussions with possible involved entities • Ensures periodical monitoring and update of the data
Contributor	<ul style="list-style-type: none"> • Responsible for the data integration • Responsible for alignment with the used framework

CRITERIA

SHALL	Working group has a vision Working group vision can be aligned with a set of existing ASA WGs or can contribute to / benefit a further WG ASA Skills Hub is used according to the approach and rules
SHOULD	Working group has a set of outcomes Working group is presented in workshops, conferences, or other events by ASA Working group has regular meetings where ASA representatives can be invited to Working group can establish joint vision statements with ASA and publish that
OPTIONAL	Working group has a cooperation infrastructure to share materials with ASA online Working group shares their logo back to ASA to promote partnerships with automotive working groups Working group members are also members of ASA

2. Assessment Process

ASA Secretariat reviews the criteria fulfilment when a new activity is being established. The ASA will receive an application of an applicant, and this application contains an explanation by the service/activity provider on how they fulfil those criteria. The role of the TC is to evaluate this application:

Procedure To Be Applied	Explanation
Compliance Rules	Decisions must be traceable and transparent. This means that at least 1 selection criteria, even if it were added by the evaluator as a new criteria, SHALL be documented
Criteria Selection	Criteria are Selected by Y(es) and N(o)
Evaluation	The evaluation sheet establishes whether at least one criteria is selected with Y(es). This is the minimum requirement.
Traceability	For criteria selected by Y(es), the evaluator SHALL ENTER a comment to make the decision traceable.
Red/Orange/Green	The schema of Red, Orange, Green is only used to express the importance of this criteria from the viewpoint of the evaluator. The evaluator is allowed to change this priority as needed.
Summary	The number of Yes are counted automatically in the summary sheet.
Summary Evaluation Statement	A decision statement referring to the Y(es) criteria is added in the summary page.
How to use Y(es) and N(o) in the Criteria Selection Tab	It is sufficient to select Y(es) for the criteria you chose. Any empty field is interpreted as N(o). The number of Y is counted in the summary sheet.

16

2.1. ASSESSMENT WORKFLOW

The figure below shows the assessment process workflow. This is also described by the table below.

TABLE 1: ASSESSMENT WORKFLOW ACTIVITIES

Role	Activities
ASA Secretariat	<ul style="list-style-type: none"> Receives the updates and, upon the evaluation/assessment meeting, makes decisions (accept/ update/ reject service cooperations) Ambassador Performs spot checks to evaluate whether the TCs complied with the standard defined RED, ORGANGE, GREEN criteria and that the assessment tool was properly used Produces a quality report from the assessment (e.g. TC meeting)
ASA TC	<ul style="list-style-type: none"> Recommends improvements/ contents / acceptance or denial of the group to ASA secretariat.

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

	<ul style="list-style-type: none">• Evaluates the quality of services/activities based on defined criteria (TC may use the assessment checklist/tool)
Submitting WG/TF	<ul style="list-style-type: none">• Submits an application mapping the criteria

3. Assessment Tool

This section defines an assessment tool and describes it.

Defined criteria:

The tool includes a list of high priority (red), medium priority (orange), and low priority (green) criteria.

Maximum flexibility is allowed:

- The priority can also be redefined by the evaluator.
- Additional criteria can be added.
- Only 1 YES is required.
- Even with one commented Yes to a low priority criteria, the application can be approved.

Quality Criteria Type	Decision Criteria	Selected Y/N	Justification/Comment
Red	Examination strategy: e.g. Exam by MCQ (test) e.g. Exam by mandatory exercises, evidences and assessment of skills (mandatory exercise assessor role). Important approach to support accreditation of prior learning and life long learning.		
Red	Logo of ASA used in certificates		
Red	Certificates mapped to ASA skills and competences.		
Red	Certifier shall have a clear focus and visibility in the automotive sector - more than 75% job roles serviced in the automotive area) because it supports the automotive blueprint. - More than 1000 automotive certificates issued so far		
Red	Certificates shall base on a database and carry a retrievable identifier (ISO 17024)		
Red	Renewal policy of certificates must be defined.		
Red	The promotion of the ASA exam and certification services cooperation (web site, flyer, ...) shall have a clear automotive focus (not to be placed in a non-automotive context)		
Red	Skills badge interface to ASA		
Orange	Services which allow an online validation of the certificates.		
Orange	Support hotline for the exam and certification services		
Orange	Defined pool of MCQ exam questions		
Orange	Defined set of mandatory exercises for skills assessment type of exams		
Green	Exam guidelines available.		
Green	ASA cooperation is promoted on the web site		
RedorOrangeorGreen	<we#rite own criteria here>		
RedorOrangeorGreen	<we#rite own criteria here>		
RedorOrangeorGreen	<we#rite own criteria here>		

FIGURE 3: EVALUATION CRITERIA RATING YES/NO AND COMMENTING

Evaluation Principle:

According to compliance rules, decisions must be traceable and transparent. This means that **at least 1 selection criteria, even if it were added by the evaluator as a new criteria, SHALL be documented**

3.1. Rating Scale and Process

A simple Yes / No rating scale is used.

The evaluation is positive if at least 1 criteria is rated Yes and the evidence for the Yes is commented.



3.2. Aggregated Evaluation Sheet

The evaluation summary sheet aggregates the number of yes, and the evaluation is positive if at least 1 yes is rated.

This is displayed in a summary sheet.

Application	
Organisation Name	
Address	
Contact	
E-Mail	
Service	
Evaluation	
Assessor	
Date	
Signature	
Results	
Criteria with Y Minimum is >= 1	0
Overall Summary Statement	

FIGURE 4: EVALUATION SUMMARY SHEET

3.3. The Assessment Tool

The assessment tool is based on an Excel checklist with 3 work sheets (see above screen shots)

Work Sheet Summary

- Aggregates the number of yes automatically
- Provides a summary statement
- Provides general data

Work Sheet Criteria Selection

- Provides high priority, medium priority, low priority criteria to be rated
- Rating Yes/No is done
- Minimum 1 shall be rated Yes for a potential acceptance
- The Yes rated criteria SHALL be commented in order to facilitate a transparent decision

COLLABORATION CONTROL AND QUALITY MECHANISMS / D3.2

- Maximum flexibility is allowed, the evaluator can add criteria or redefine priorities
- Note: It is not allowed to provide a Yes rating with no documented comment to explain the reason for acceptance

Work Sheet Procedure

- Explains how to use the tool

3.4. Re-evaluation

Based on a defined period, the service/activity cooperation is re-evaluated using the assessment checklist/tool as a default period. This may be adjusted per group.

4. Typical Outcomes of the Assessment Process

Using the assessment tool, the criteria are rated and overall recommendations are documented. The assessment/checklist completed per rating of the service cooperation must be maintained in a version-controlled ASA work space until next re-evaluation.

The service and the assessment can be spot-checked by the ASA quality manager who reports to the ASA board.

4.1. List of typical outcomes

- Evaluation of submitted application and accept/reject letter.
- Completed / challenged? assessment checklist/tool & documented recommendation.
- Spot Checks by the quality manager checking the completed assessments.
- Quality report submitted to the ASA board by the quality manager.

ANNEX A : Assessment Process Templates

The assessment tool is explained in chapter 2. In this annex, additional templates are explained.

Assessment Planning Template

In the Excel file in the worksheet “Assessment Scope”, the assessment planning data are entered. See below.


		Assessment Scope	
WG name and Number	<add WG name and identifier e.g. WG 3.6 IT in Automotive>		
FAMENCO Guideline (Deliverable 3.2) Version	1st Version 2023		
WG Committee Interviewees	Name(s) of the committee members interviewed		
Location	where the interview takes place		
Assessment Purpose			
e.g. improvement of WG performance, progress check on improvements, WG service maturity evaluation			
List of Services to be assessed	<add service names e.g. conference cooperation>		
Target Maturity	e.g. are all Yes rated criteria properly commented and decisions traceable		
Number of services to be assessed	1/2/3/4/...	Level of Independence	A - WG external independent assessors B - mix of WG external independent and WG internal assessors
Process Context			
Assessment Context Category	A (1 Sample Service Selected) B (A proper subset of services selected) C (All services assessed)		
Comments			
<add here additional comments / descriptions>			

FIGURE 5: ASSESSMENT PLANNING TABLE

Planning the rating of services/activities in a WG

In the Excel file in the worksheet “Services/activities Rating Selection”, the services/activities to be assessed are selected and also it is decided which criteria shall be rated using the assessment tool.

See an example below.


 Flamenco <small>Forward Looking Approaches for Green Mobility Ecosystem Network Collaboration</small>	Service Selection for Audit		
Services	Example 1	Example 2	Example 3
Conferences, events			
Training creation (curriculum)	X	X	X
Skills analysis			
Study visits			
Job role definition			
Funding			
Certification	X		
Skills needs			
Database of training courses and skills concepts			
Mutual recognition of the learning			
Methodologies			
Piloting the courses (e.g. online)			
Talent and skills matching			
Networking			

FIGURE 6: SERVICE SELECTION

Remark: The assessment tool (see chapter 2) will be used for each selected service separately.

Planning the Interviews

In the Excel file “O3_TOOL-ASA-WG.Services/activities-Assessment-Plan-Template-vx” in the worksheet “Schedule” the interview plan is inserted and maintained.

				Version x.y	
Assessment Team			WG name		
Lead Assessor (LA): <Name and email>			WG contact person		
Co-Assessor (CA): <Name and email>			Version of FLAMENCO Guideline		
			Assessment Language		
			Assessment Location		
Date	Agenda Item	Schedule	Name of Participants	Participating roles	Meeting Room
Day 1					
	Overview of WG	08.30-09.00			
	Overview of WG Services	09.00-09.30			
	Break	09.30-09.45			
	Service 1 assessment	09.45-12.30			
	Lunch	12.30-13.30			
	Service 2 assessment	13.30-15.30			
	Break	15.30-16.00			
	Service 3 assessment	16.00-18.00			
Day 1	Consolidation	18.00-18.30			
Day 2					
	Service X assessment	08.00-10.00			
	Break	10.00-10.30			
	Consolidation and feedback preparation	10.30-12.30			
	Lunch	12.30-13.30			
Day 2	Feedback presentation to WG	13.30-15.30			

FIGURE 7: INTERVIEW PLAN AND SCHEDULE

Assessment reporting

The assessment report will show an overall rating of N/P/L/F per RED, ORANGE, GREEN criteria of a service. Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.



The assessors will highlight in a feedback presentation the strengths and deviations.

Should deviations be observed, the WG establishes an action plan therefor that shall be tracked and the progress will be reported to the ASA board.