

510007-LLP-1-2010-1-CZ-LEONARDO-LMP

WORK PACKAGE 4

Implementation and exploitation projects

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D7: VALIDATION REPORT ON IMPLEMENTATION PROJECTS

PRESENTATION OF COUNTRY FEEDBACK ON THE EMOLL METHODOLOGY,
KEY PERFORMANCE INDICATORS AND SIMULATION MODEL

*APPENDIX 5 - GUIDELINES TO THE PROCESSES OF
IMPLEMENTING THE PRODUCT INTO BENEFICIARY
ORGANIZATIONS*

Public

March 2012

510007-LLP-1-2010-1-CZ-LEONARDO-LMP

This report has been prepared thanks to international project **Efficiency Measurement of Lifelong Learning, using of Balanced Scorecard Concept (EMOLL)**, no. 510007-LLP-1-2010-1-CZ-LEONARDO-LMP, which is supported by **Lifelong Learning Programme of European Union, Leonardo da Vinci – Development of Innovations**.

This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

CONTENTS

1. INTRODUCTION	5
2. OBJECTS OF THE PILOTING/VALIDATION	8
2.1 PACKET OF KPIS	8
2.2 SIMULATION MODEL	9
3. TARGET GROUPS INVOLVED IN VALIDATION/EXPLOITATION PROCESS.....	10
3.1 THE PARTNERS' COUNTRIES.....	10
3.2 THE ORGANIZATIONS	10
4. GUIDELINES AND TOOLS FOR PILOTING/VALIDATION.....	11
4.1 SCENARIO 1	11
4.2 SCENARIO 2.....	12
4.3 ROLE OF THE EXPERT TEAM (EMOLL EXPERTS)	13
4.4 OUTPUTS FROM EACH TRIAL	14
4.5 TIMESCHEDULE OF WP4.....	15

Version history	Date	Comments
1.0	13 th February	First version
2.0	27 th February 2012	Second version
3.0	07 th March 2012	Final version

1. INTRODUCTION

This document is conceived within the framework of Work package 4 *Implementation and exploitation projects*.

The WP4 consists of globally three tasks:

- “Trial Specification”
- “Validation Methodology”
- “Validation report”

“Trial Specification” objectives: a detailed set-up trial schedule and procedure will be produced before executing any trial involving final users. The procedure will define such issue as the definition of the participants profile and the minimum scenario requirements, trial script and schedule, user selection/information/training processes, configuration of the equipment and final possible reward of the validation participants.

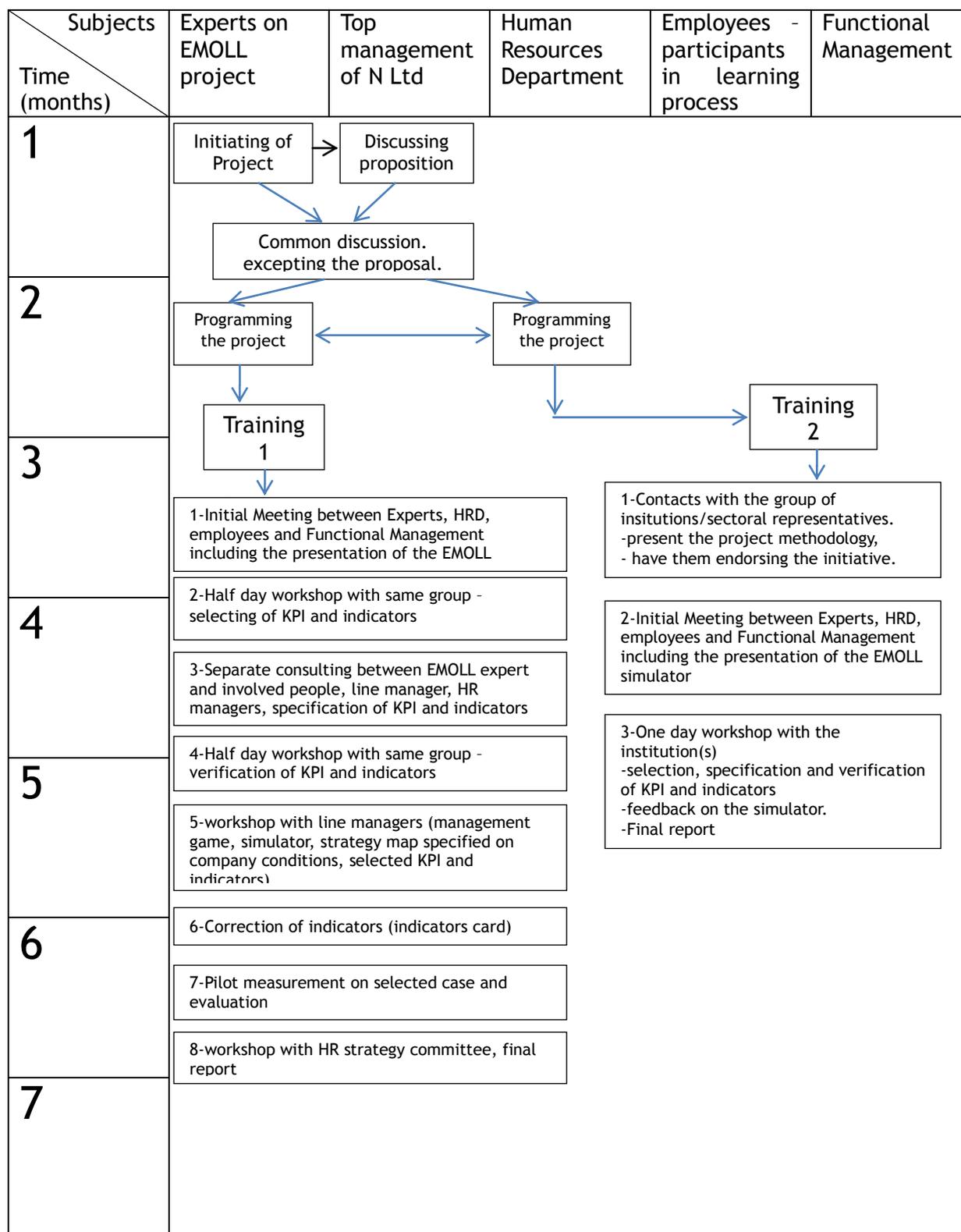
“Validation Methodology”: the validation methodology will describe the set of actors and stakeholders involved, present the key variables and questions, and define the approach, principles, steps and tools by which quantitative and qualitative data is going to be taken from the trials.

“Validation report”: the results obtained from the trials will be organised for analysis and subsequent dissemination. The yielded conclusion, together with the validation results, will provide the necessary data to:

- Improve the overall quality and efficiency of the eMoll model thus deliverables will be modified accordingly;
- Ensure the soundness of EMOLL products with respect to higher exploitation and satisfaction for future beneficiaries
- Feed the “Best practices” report of the implementation and adaptation of the methodology to each organization context.

The first two tasks will be tackled within this this document while the third one will be the object of another deliverable.

Here below an example of EMOLL methodology is visualized This visualization has to be done on the base of summing the best practices of each national expert group.



This document provides the framework for conducting Piloting/Validation process to ensure that all the relevant information and tools to handle the process in an effective and correct manner are provided and specifically aims at:

- Designing and developing the methodology to validate the EMOLL project results;
- Specifying the trial set-up and condition under which the trials will take place;
- Undertaking the validation procedure in a number of scenarios;
- Providing support to all the partners in formative evaluation activities.

The Validation and exploitation activities will focus on the three main deliverables of the project: EMOLL METHODOLOGY, PACKET OF KPIS AND SIMULATION MODEL.

Different tools will be implemented to validate each of them.

The document is composed by three main parts and supporting annexes:

1. Introduction, where the aim and the structure of the document is described.
2. Objects of Validation/Exploitation, where the outputs to be validated are described.
3. Guidelines and tools, where the methods and the tools to be used for Validation and Exploitation activities are described.
4. Annexes, where the reference materials and handouts (like questionnaires and n templates) are provided.

2. OBJECTS OF THE PILOTING/VALIDATION

The description of EMoll Methodology was developed for the orientation into the possibilities of application of the BSC method when planning and implementing training programmes in organizations.

The objects of Validation are:

- the document itself
- the EMOLL methodology

Questions to be answered:

As regards the document:

- is the concept of BSC described clearly?
- is the structure and volume of the document appropriate for its potential users?
- is the information provided by the document comprehensive, sufficient and coherent?
- is the methodology of BSC for training evaluation showed in a convincing way?
- is the document useful for its target group?
- any suggestions to make it better?

As regards the EMOLL methodology specifically:

- is the proposed methodology clear and easy to understand?
- is the proposed methodology appropriate for your sector?
- is the proposed methodology possible to implement in a given country?
- does it capture the specificity of the training evaluation?
- What perspective do you see for the methodology in terms of training evaluation?
- Any suggestions to make it better?

2.1 PACKET OF KPIS

The indicators of performance BSC were developed to allow the measurement of the efficiency and efficacy of the accompanying mechanism with regard to the expectations of the different interested parties.

They are divided up into four principle axes: the client, the finance, the internal process, the skills acquired and the development. For each axis, categories have been defined. Each of these categories is the object of a certain number of indicators which will be chosen and adapted by each organisation in function of its global strategic vision

The object of Validation are the KPIs themselves.

Questions to be answered:

- Is the concept of KPIs described clearly?
- Is the structure of the cards appropriate for its potential users?
- Is the information provided by the fiches comprehensive, sufficient and coherent?
- Is the target value of the indicators chosen clear and easy to understand?
- Is the fiche user-friendly and easily adaptable?
- Is the document useful for its target group?
- What strategy topics and KPIs are efficient and useful for target group? (feedback from each trial)
- Any suggestions to make it better?

2.2 SIMULATION MODEL

The model was developed to provide a tool simulating the real word acting as a practical guidance to the users.

The objects of Validation is the Simulation Model itself.

Questions identified:

- Is it clear, user friendly and understandable?
- Is the graphic friendly for its potential users?
- Is the content comprehensive, sufficient and coherent?
- Are the benefits of BSC for training evaluation showed in a convincing way
- Is the technical solution appropriate and user friendly?
- Is the software useful for its target group?
- Any suggestions to make it better?

3. TARGET GROUPS INVOLVED IN VALIDATION/EXPLOITATION PROCESS

3.1 THE PARTNERS' COUNTRIES

Validation will take place in the countries of all partners to guarantee representative, exhaustive and significant feedback, i.e.:

- Czech Republic;
- Italy;
- Poland;
- France;
- Bulgaria;
- Turkey.

The role of the partners in the process will be differentiated.

3.2 THE ORGANIZATIONS

The main target groups for contact in Validation/Exploitation phase is broad and covers:

- product-oriented organizations (e.g. industry)
- service-oriented organizations (public sector, administration , NGO´s, commercial organizations providing services -i.e banks)

The ratio of the two target groups settings is based on strategy management perspective.

The project partners should make a strong effort to gather feedback from as broad spectrum of organizations as possible to ensure the quality of Validation/Exploitation process.

4. GUIDELINES AND TOOLS FOR PILOTING/VALIDATION

The form will be of a qualitative research in which a group of people are asked about their opinions towards a product, service, concept, advertisement, idea, or packaging. Questions are asked in an interactive group setting where participants are free to talk with other group members.

The procedures have been diversified in two different scenarios according, each partner can freely choose the one more fitting to their target organization(s).

4.1 SCENARIO 1

Characteristic of pilot organization

- a) Top management oriented on strategy management and supported by analytical methods,
- b) Ideally BSC on Top Level, or at least basic knowledge about BSC and clear strategy goals and visions
- c) Strong brand, ideally international scope of activities
- d) Ability to invest to HR development

Procedures

Step 1) One day workshop with key people involved in trainings HR department. Selected line managers, member of top management, external trainers (in option), EMOLL facilitator (HR strategy comitee).

Task,

- management game with simulator,
- discussion about EMOLL model (strategy map), adjustment on specific company conditions, vision - links between training and company strategy, KPI.

Expert day : 3 (for each expert)

Step 2) Half day workshop with same group - selecting of KPI and indicators., Expert day : 2

Step 3) Separate consulting between EMOLL expert and involved people, line manager, HR managers, specification of KPI and indicators ,Expert day 4

Step 4) Half day workshop with same group - verification of KPI and indicators, Expert day : 2

Step 5) One day workshop with all line manager,

- management game, simulator, - familiarizing with EMOLL (BSC) approach
- presentation of proposed system, strategy map specified on company conditions, selected KPI and indicators

Expert day : 3

Step 6) Correction of indicators (indicators card) - measuring procedures, responsible persons

Expert day : 3

Step 7) Pilot measurement on selected case and evaluation, Expert days 5

Step 8) Half day workshop with HR strategy committee, final report , Expert day : 3

Number of expert days for pilots : 25 (based on company size)

4.2 SCENARIO 2

Characteristic of pilot organization

Same of previous scenario

Procedures

Step 1) Contacts with the group of insitutions/sectoral representatives.

Tasks,

- present the project methodology,
- have them endorsing the initiative.

Expert day : 2

Step 2) One day workshop with the institutions willing to proceed forward in the validation process to raise awareness on the importance of training evaluation and impact. Presentation of the project.

Task,

- management game with simulator,
- discussion about EMOLL model (strategy map), adjustment on specific company conditions, vision - links between training and company strategy, KPI.

Selection of one-two institution(s) to move forward with the procedures.

Expert day : 2,5

Step 3) One day workshop with the institution(s)

Tasks,

- selection, specification and verification of KPI and indicators
- feedback on the simulator.
- Final report

Expert day: -4-5

Number of expert days for pilots 8,5-9

4.3 ROLE OF THE EXPERT TEAM (EMOLL EXPERTS)

- BSC shows perceptions of training process
- BSC is „process method“
- To understand connections of process is more important than output itself
- *Two types of positions in expert team:*

Facilitator

- Lead and facilitate discussions
- Main goal - set up client mental model as a strategic map and consensus about main indicators
- Interpretation of results, projection into strategic map

Knowledge:

- Strategic management
- Advanced knowledge of BSC
- HR training and development
- Ability to interpret data from system point of view

Indicator Expert

- Support to Facilitator
- Negotiation about data delivery
- Design of algorithms and frequency of indicator calculation
- Design of Top level scorecard (current results and planned figures of all indicators)

Knowledge:

- Measures setting, performance measuring
- Measure calculation methods, statistics, controlling
- Methods of graphic data presentation, advanced statistic methods

4.4 OUTPUTS FROM EACH TRIAL

- Strategy map (both scenarios)
- Set of KPIs (use our standardized form of measure cards) (both scenarios)
- Feedback in questionnaires (see annexes) consolidated by partners in the excel sheets (both scenarios)
- “Best practices” ID cards- (scenario 1)
- Attendance lists from workshops (standardized form based on Project meetings attendance lists) (both scenarios)

4.5 TIMESCHEDULE OF WP4

- Each trial's progress will be presented in 3rd project meeting in Sofia (May/ June)
- Trials to 30th June 2012. Each partner shall provide to Scierter excel consolidated sheets with the joint results of each questionnaire together with other outputs from each trials
- Finalization of Best practices (D8) by Scierter till 31th July 2012.
- Finalization of products D2 and D3 (documents in "semi-product" state) by partners lead by Europrofis till 31th August 2012.