Project SILVER

Deliverable number 5: *Quality Assurance Plan*

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Language version (EN)

1   Management summary

This report pulls together all the relevant information created to ensure the successful execution of the SILVER project and makes up the Quality Assurance Plan to be used as a reference guide for partners in delivering the project outcomes.   The Quality Assurance Plan has been produced by project partners. Each partner contributed to the plan by taking responsibility for preparing one of the methodological guides for the various activities. The Plan will be agreed by the Steering Group.

The structure of the plan is as follows; first it outlines the guidelines for project work which were created by the Lead Partner as part of deliverable 1.1.1. Next the Quality Assurance plan details each of the methodological guides which were developed as by each of the project partner as part of work package 5. The methodological guides relate to all aspects of project delivery including; project standards, adapting & designing interventions, developing train the trainer workshops, testing & evaluation, researching intergenerational learning and writing handbooks.

The plan then details the template framework for 'state of the art' reports. It also includes the 'deliverable evaluation form' which was created to evaluate the effectiveness of each deliverable. Lastly, references used in preparation of the report are listed.

2   Table of Contents

3   Introduction

In order to ensure the successful execution of the SILVER project this Quality Assurance plan has been created as a guide to the delivery of each of the work packages.   The aim of the Quality Assurance plan is to ensure a high quality in the realization of the activities set out and in the content of the deliverables produced.   The plan consists of the methodological guides for the various activities.   It consists of the following content:

- Agreement on standards that will set strict minimum requirements to be attained for each stage of the project

- Agreement on general guidelines to be followed for smooth implementation of the project activities

- An outline of the steps that should be taken for the implementation of each activity, and when that should happen

- Design of specific roles and responsibilities among and between the partners to determine exactly who is responsible for what

- Quality control of the implemented activities to verify that activities meet the criteria established

4 Guidelines for the Project Work – Deliverable 1.1.1[1]

The guidelines in this report explain the managerial operation of the project. It contains the common set of project guidelines to be agreed upon by the steering committee and all other information needed to implement and complete the project successfully as well as effectively and efficiently. The strategic focus of the project's planned activities is explicated here too. Internal and external communication strategy of the project can also been found here. Finally, specific information flows needed for reporting on activities and financial matters will also be made concrete. We also use existing project management tools (such as the one found at www.european-**project-management.eu**/fileadmin/.../Survival_Kit_EN.pdf).

4.1 Strategic focus

The strategic focus of the project is on making Intergenerational Learning (IGL) work in the difficult circumstances of the daily practice of work in organisations. This has never been done before in a systematic way. It will help end-users (HRD/M trainers, knowledge workers, managers) design and implement successful IGL practices tailored to their specific contexts based on available scientific evidence. Results will help managers decide on the most effective ways of implementing IGL. It will help policy makers and sector organisations develop policies for facilitating IGL in different sectors of the economy. And the project will provide data for Lifelong Learning researchers on the effectiveness and mechanisms of IGL practices.

4.2 The project organisation itself

The basic organisation of the project is shown in the figure below.

Figure 1. Project Organisation
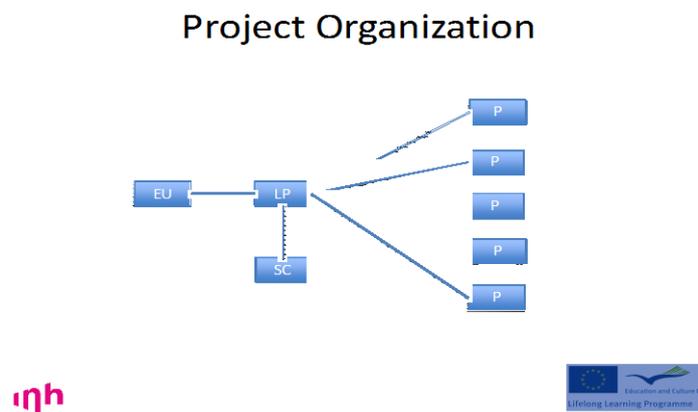
EU = European Union

LP = Lead partner (INH) serves as the link between the EU and the other five partners (P)

SC = Steering committee is associated with the LP

For individual partner agreements concerning deliverables, etc. please see "Detailed Description of the Action".

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[1] Author: Donald Ropes - Inholland University of Applied Sciences, Haarlem, The Netherlands

4.2.1 Project governance

The Lead partner (LP) has the overall responsibility, project co-ordination and financial management for this work package. The LP has nominate an experienced Project Co-ordinator (PC) – Don Ropes, a Project Assistant (PA) – Alexandra van Zutphen, a Financial Manager (FM) – Don Ropes, with support from Marga Duin. PC, PA and FM together form the Project Management Team (PMT), responsible for daily operations.

Each partner has nominated a Local Project Co-ordinator (LPC). The LPC is responsible for day-to-day work in the partner country. The LPCs work in close co-operation with the PMT. The LPCs also assure that all necessary information to compile activity and financial reports is provided to the LP with no delay.

Three partners (P1, P2 and P6) have nominated one member plus one deputy for the operation's Steering Group. P1 has nominated Drs. Ing. Jan Dexel from the Dutch Ministry of Economics; P2 has nominated Prof.dr. Esko Alasaarela from the University of OULU and P6 has nominated Ms. Marjorie Miller, MSc who is Manager and Principal Officer at Glasgow City Council, Glasgow, UK.

The Steering Group is the operation's supervisory and advisory board and will deal with strategic aspects of the project. It will ratify the work programme and monitor the project's progress. Steering Group members work at upper-management level and have experience in the field as well as a large international network.

4.3 Internal communication

The following guidelines for internal communication are in place and have been agreed upon by all partners during the kick-off meeting.

- Communication takes place via a working platform (intranet) located on the website as well as via email and/or Lync (or another web-based platform, if Lync does not work).

- An agenda and minutes will be produced for every meeting.

- One key person per institution will be constantly involved in the project. All communication from the coordinator to the partners goes through the either the local project manager, or in the case of financial matters, the local financial manager.

- All partners contribute to maintaining a good overall atmosphere.

- Be clear about expectations, especially towards the coordinator.

- We will be precise and timely in giving information to the host organization (like the number of participants in a meeting).

- Workshops are prepared by the coordinator and host jointly.

- We will keep an open mind in our cooperation.

4.4 External communication

The point of external communication is two-fold. Firstly we want to make sure we reach our target groups.

The second point is to assure efficient and effective dissemination. We have developed the following 5-tier strategy for this. The point is to reach all stakeholders as well as those who may be interested in the project in the most effective ways possible. Each tier gives the level of dissemination, an idea

of what exactly will be disseminated, and the methods to be used. A database of contacts meant for targeting information to at each tier will be developed and updated regularly.

Generally, partners will make sure that each activity ends in a product that can be disseminated. For example reports (please see the work packages for details) that can be disseminated through existing channels at each of the tiers. All major milestones will be reported on and disseminated as well. There will be a website and web-based learning community to help with dissemination as well.

Tier 1: Individual level. Each participant will be responsible for disseminating the project information such as progress and results to his or her organisation and networks. This will be done by speaking to colleagues about the project, notices on professional network websites, presentations at conferences, papers published in journals in one's academic field, etc.

Tier 2: Institutional level. Each partner is responsible for communicating project information to the institution and assuring notice on the institution's website. This will be done for each project milestone. Dissemination is also implicit for institutions that participate in the testing. Internal events will also be targeted.

Tier 3: Sector level. Each partner is responsible for communicating project information to the sectors in which they are involved. Regional, national an international sector organisations will be involved in the dissemination. This will be through flyers, articles written for sector-wide journals and press releases about major milestones. All products will be made available to the sectors in which the testing was done. A workshop will also be held for this group.

Tier 4: National level. Each partner is responsible for communicating project information to national entities through flyers and press releases about major milestones. Website (publicity) and workshops on the topic will be given, where project information will be disseminated. Special attention will be given to the institutions and organisations providing of facilitating lifelong intergenerational learning opportunities for adults, whether of a formal, non-formal or informal nature such as training, coaching and consultancy organisations.

Tier 5: International level. Each partner is expected to publish and present his/her work international (academic and practitioner) conferences and network meetings. Also, each partner is expected to take part in the web-based learning community.

4.5 Controlling quality

Quality control is done in several ways following the following aspects:

- Monitoring – is/has the project plan, or parts thereof, been fulfilled?
- Formative evaluation – does the project plan need changes or modifications?
- Summative evaluation – are/did the project process going well and are the outcomes useful?
- Appraisal – should any expectations, aims and objectives, or agreements be adjusted?

4.6 Monitoring

Regular monitoring and record keeping is crucial for the progress of the project and is done in the following ways.

- Supervision of the actual activities.
- Regular comparison between the actual and planned activities.

- Interpretation and usage of this information in further planning of project activities.
- We develop common forms for everything that has to be reported on.
- We agree on deadlines for returning forms.
- Written guidelines are provided for everyone who works in the project.
- Project files are regularly (bimonthly) updated
- External communications are evaluated for effectiveness (are we reaching enough of the right people?).
- Internal communications are evaluated for effectiveness (are we communicating enough about the right things?).

4.7 Evaluation

4.7.1 Formative

The following questions are used to guide the evaluation process is to ascertain if the main project aims and objectives are being attained and if not, why not, and what has to be changed?

- Do all the directly involved staff and other participants have a feeling that they can contribute to the project as much as possible, if not, why not, what has to be changed?
- Is the communication within the partnership appropriate and efficient, if not, why not, what has to be changed?
- Are the project team members working together towards common aims and objectives, if not, why not, what has to be changed?
- Did the individual partner complete the agreed tasks, if not, why not, what has to be changed?

4.7.2 Summative evaluation

The point of this is to find out about the measurable project results. Information will be collected using desk research (document searches) interviews and questionnaires (for the public). Guiding questions are:

- Did the individual partner complete the agreed tasks, if not, why not?
- Was the teamwork effective? Why/not?
- Have the target groups been reached effectively? Why/not?
- Was the R&D cycle an adequate model for this project? Why/not?
- Has the budget been used effectively? Why/not?
- What went well, what could have gone better?

4.7.3 Appraisal (outcomes)

Appraisal means looking at the deliverables and seeing if they had the expected and desired impact on the different target groups. This will be done after each test of the tool as well as at the end of the project. Appraisals are done through interviews and questionnaires among the target groups using the following questions as a guideline:

- Were the target groups reached as planned? Qualitatively ? Quantitatively?

- Was the testing effective and representative?
- Are the outcomes usable in the different sectors and cultures?
- Which aspects of each tool are effective? Which need to be improved? How?
- Was our communication effective? Why/not? How could it be improved?

4.8 Reporting

This section is about the flows of information in regards to activities and financial matters.

4.8.1 Reporting on activities

Reporting on activities means writing and submitting two reports to the EU following the templates given in the CEC contract. This is the responsibility of the lead partner. The first report is due September 17, 2012 and the final one November 19, 2013. Partners report on activities to the coordinator as needed, or when asked to by the coordinator via the local project manager.

4.8.2 Financial reporting

Reporting on finances means writing and submitting two reports to the EU following the templates given in the CEC contract. This is the responsibility of the lead partner. The first report is due September 17, 2012 and the final one November 19, 2013. Partners report on activities to the coordinator as needed, or when asked to by the coordinator via the local project financial manager.

4.8.3 Miscellaneous

For specifics on contractual agreements that also influence the projects running, please see the document entitled 'Partner Contract'. This is located on the website.

5 A Guide to Project Standards – Deliverable 5.1.1[2]

This report serves as the guidelines for quality assurance for each of the different processes in the project. We base our quality control on the PDCA cycle, adjusted specifically to the project itself. The following figure shows the PDCA cycle graphically.

Figure 2. The PDCA cycle
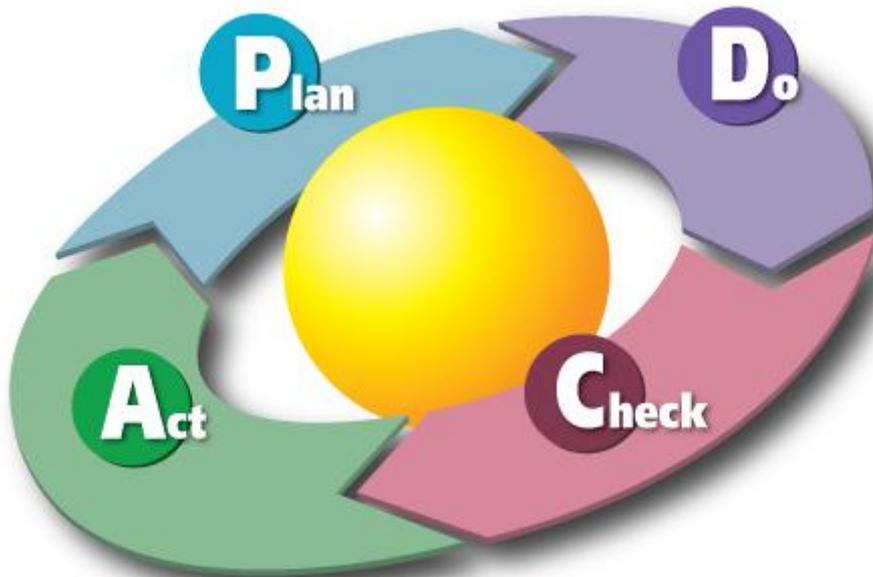
5.1 The general PDCA cycle in SILVER

PDCA stands for *P*lan *D*o *C*heck *A*ct. To carry the PDCA cycle out, each of follow the four steps from the figure above are taken.

P is for Plan. This is given in the project proposal and should continually be referred to for direction.

D is for Do. This is the implementation of each of the activities in the work packages and results in a deliverable. As no plan is ever completely perfect, please make sure you make a list of problems as you encounter them, and how you responded to them.

C is for Check. Once you've finished the deliverable it needs to be evaluated. This is done using several different processes and forms made especially for this purpose. There are more details on this in a following section.

Act. After evaluation, changes should be made to the deliverable and re-checked.

5.2 The PDCA cycle in SILVER project

In this section each of the four steps of the PDCA cycle is elaborated on in regards to different processes and deliverables in the project.

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[2] Author: Donald Ropes - Inholland University of Applied Sciences, Haarlem, The Netherlands

5.2.1 Plan

The general plan for each deliverable is given in the project proposal (officially called the *Detailed Description of the Project*) and should be adhered to strictly. If structural changes are made then they need to be explained to the project manager. Specific plans for implementation (timelines, etc.) are also documented using the appropriate form and should be checked by using the 'four-eyes' policy (at least one other person looks at it).

5.2.2 Do (implementation)

Implementing the project is done according to the plan outlined in the project proposal. Again, if structural changes are made during the implementation then they need to be explained to the project manager. Specific aspects of implementation need to be checked by using the 'four-eyes' policy (at least one other person looks at it).

One of the risks of an international project such as SILVER is consistency in the deliverables themselves. We assure consistency, and in turn quality, by using agreed-upon processes and templates for all deliverables. In WP 5 one can find a list of protocols for developing each of the tools in the toolkit, as well as for most other processes. Furthermore, general scientific principles for research and reporting are used. Templates for reports, meeting formats, flyers and other public documents are all developed and agreed upon by all the partners, insuring consistency and minimum quality. Each of these is available on the project website.

5.2.3 Check (evaluation)

This is the focus of the quality control cycle and evaluation of each of the deliverables and overall the general implementation of the project is done regularly giving regular feedback for improvement. Generally, we use the following techniques for evaluation;

- Four-eyes principle – at least one other person evaluates the deliverable

- Evaluation frameworks – have been developed and are used for each deliverable

- Feedback - from end-users is incorporated in the evaluation

- The '5 why's' – pinpoints problems and in turn gives guidance for improvement

5-why Process Flowchart

Figure 3. 5-why Process Flowchart

The concept of 5-why is simple:

1. Identify the problem.

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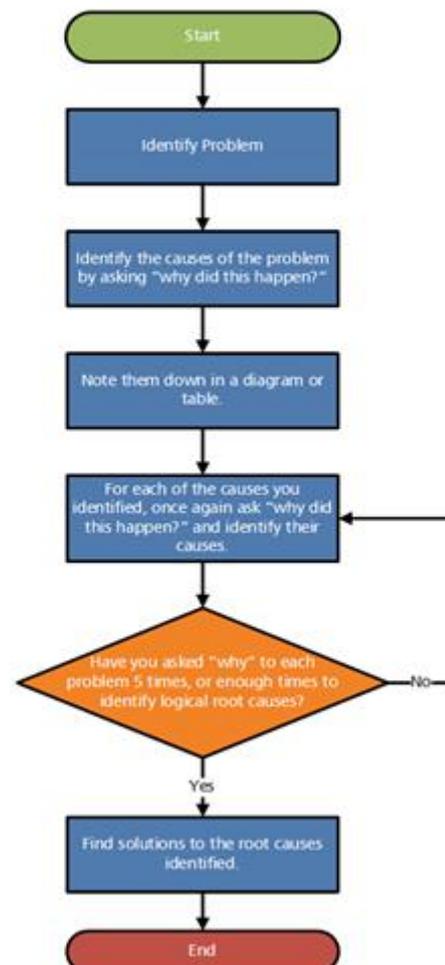
2. Ask yourself: why did this happen? Come up with all the causes you can think of.

3. For each of the causes you just identified, ask "why did this happen?" again.

4. Repeat until you've done steps 2 and 3 for five times. You should have identified the root cause by this stage.

5. Find solutions and countermeasures to fix the root cause

5.2.4 Act (fix the problem)

Fixing a problem has two levels; the surface level and the deeper level, which is the actual root of the problem. Using the 5-why framework helps to fix the root of the problem, not just what sprouts from it.

And then the cycle starts again…..

6 Methodological Guide to Adapting and Designing Interventions – Deliverable 5.2.1[3]

6.1 Overview of the design process

For designing effective interventions in organizations the design cycle (Andriessen, 2004) can be used (see figure 4).
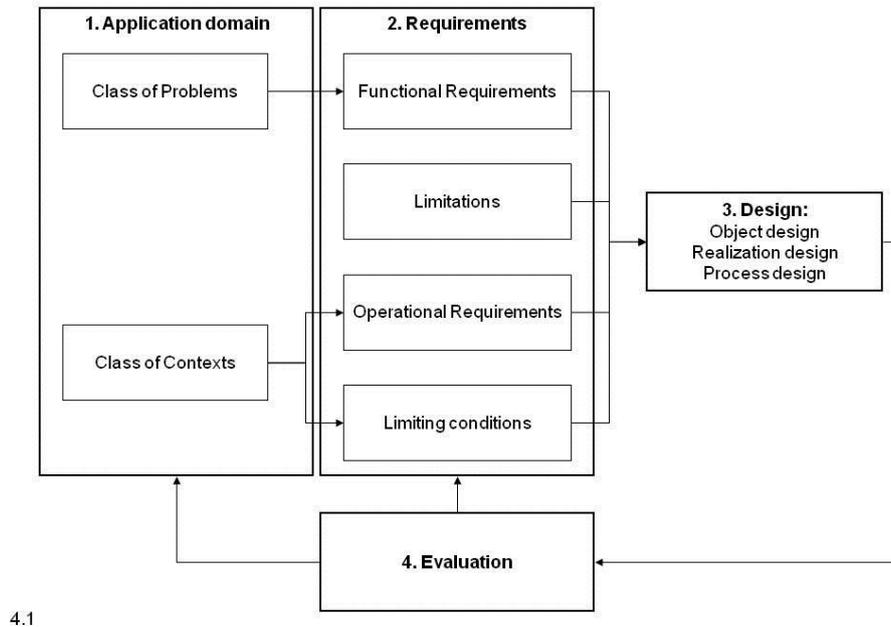
Figure 4. The design cycle (Andriessen, 2004)

Step 1 of the design cycle is defining the application domain. During this step we gradually develop an understanding of the class of organisational problems we were trying to address. We introduce different sets of distinctions and various ways to diagnose the situation. Step 2 of the design cycle is to create a list of requirements for the new method. There are four types of requirements (Van Aken, 1996, Weggeman, 1995):

1. *Limiting conditions* define the requirements the environment places on the method when applied.

2. *Functional requirements* define the results the method needs to produce. These requirements follow primarily from the problem definition and the demands from the client.

3. *Operational requirements* define the ease of use of the method as defined by the users of the method.

4. *Design limitations* set the boundaries for finding solutions to the design problem. The designer of the method often sets these boundaries.

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[3] Author: Daan Andriessen-Inholland University of Applied Sciences, Haarlem, The Netherlands

Step 3 is designing the new method. Based on the requirements, a solution is designed called an *object design*. This is the design of the intervention or artifact (Van Aken, 2004). The solution is implemented using a *realization design*: the plan for the implementation of the intervention or for the actual building of the artifact. A method is the combination of an object design and a realization design. Step 4 of the design cycle is evaluating the design from behind the desk. This may lead to further modifications to the application domain, to the set of requirements, or to the design itself.

6.2 Minimum quality requirements for each aspect of the process

6.2.1 Defining the application domain

The application domain states the kind of problems the interventions can be used for and the context in which they are usable. This requires a thorough understanding of the problem that needs to be solved. A problem definition should be supplied that describes:

- Who is experiencing the problem?
- Why is it a problem?
- What are probable causes of the problem?

A context description should be supplied that describes:

- In what kind of organisations should the solution to be designed work? (sector, size, character of work, etc.)
- In what parts of the organisation should the solution to be designed work? (within teams, departments or the whole organisation, between management and employees etc.)
- In what cultural context should the solution to be designed work?

6.2.2 Creating a list of requirements

First define the *Limiting conditions* for the interventions. How much time may they require from management and employees? Resources needed? How much lead time? etc. Then define the *Functional requirements* the interventions need to produce. What should be the outcome of the interventions? What should be changed after the interventions took place? After that you can define the *Operational requirements* or the ease of use of the interventions. How easy should they be to apply? Who should be able to apply them? What kind of competencies is needed to apply them? Finally there may be some *Design limitations* or the boundaries for the design process itself like the time and resources available to design the solution.

6.2.3 Designing the interventions

Interventions should be based on good practices found in literature or in practice or based on theory. Interventions should be described in such a detail that skilled professionals can implement them based on the text. Descriptions of the interventions should include the CIMO logic (Denyer, Tranfield, & Van Aken, 2008) which stands for Context, Interventions, Mechanisms and Outcome. Interventions should be grounded by references to literature describing situations in which the interventions have proven successful and/or theory that support the underlying mechanism of the intervention.

6.2.4 Evaluating the design

Before the interventions are tested in practice, they need to be reviewed by comparing the expected outcome of the interventions with the requirements developed in step 2. If there are differences between the intended functional requirements and the expected outcomes either the interventions need to be improved or the ambition level needs to be altered.   A change in ambition needs to be accounted for in the text.

6.3   General guidelines for smooth implementation of the process

General guidelines for the design process include:

- Make full use of the existing literature
- Make sure you have full understanding of the problem at hand for which the interventions are developed
- Make use of other experts in the team
- Begin with the end in mind (Covey, 1989). Write down the interventions as instructions for professionals in the field.
- Make use of the CIMO logic

6.4   Specific roles and responsibilities

The designer is the researcher responsible for devising and writing down the interventions. He or she can make use of researchers responsible for doing the literature research and grounding the interventions. Interventions are best developed by a team of designers of which one person is the principal designers. Other people that may be involved are people in the field that are either experiencing the problem or will be applying the interventions. Their feedback is very valuable as they know what will work or not work in practice.

6.5   Quality controls for evaluating the process

Each step in the design cycle should be documented. The document should have the following structure:

- Title of the intervention(s)
- Application domain:
  1. Class of problems
  2. Class of contexts
- Requirements:
  1. Functional requirements
  2. Operational requirements
  3. Limiting conditions
  4. Design limitations
- Description of interventions. For each (set of) interventions a description of:
 1. Context
 2. Interventions

3. Outcomes
4. Mechanisms

- Implementation process (realization design). Description of the process in which the various interventions are used.

- Evaluation. Possible deviations from the requirements and reason why this is needed.

7   Methodological Guide to Contextualizing Interventions – Deliverable 5.3.1[4]

This guide will be a part of the SILVER Quality Assurance Plan and it will contain the information needed for contextualization. It provides the minimum quality requirements for each aspect of the contextualization process and the general guidelines that must be followed for smooth implementation of the process. In addition it describes the specific roles and responsibilities among and between those involved in the process as well as quality controls for evaluating the process.

7.1   Overview of contextualization

In a broad sense contextualization means that a topic or issue is attached to a background, constraints, and a 'bigger picture'. Typically culture is an example of this "context" however there are other examples such as historical, verbal and social contexts. In essence if we want to understand certain actions or events we must understand the context in which they happen.

Cultural context means understanding the different values and norms that are shared among a group of people and how they differ from one's own perspective. Similarly understanding historical context means that we understand how values, norms and beliefs of people in different eras differ. Verbal context refers to surrounding text or talk of an expression (word, sentence, conversational turn, speech act, etc.). The idea is that verbal context influences the way we understand the expression. Traditionally, in sociolinguistics, social contexts were defined in terms of objective social variables, such as those of class, gender or race. More recently, social contexts tend to be defined in terms of the social identity being construed and displayed in text and talk by language users.

For the purposes of SILVER deliverable contextualizations we are mostly interested in cultural and social contexts. Verbal and historical context are also important to keep in mind and they provide valuable background information but are not so crucial for actual contextualization activities.

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[4] Author: Teppo Käisänen - Oulu University of Applied Sciences, Oulu, Finland

Figure 4. Steps of contextualisation

7.2 Tips for the contextualizers

Learn as much as you can about the industry in general and local businesses

- Use and expand your existing networks and ask questions
- Be realistic about the effort, time and money required

The steps presented in the figure above will be used to illustrate the process of contextualisation. This is important for SILVER as most of the deliverable will be contextualized not only based on the sector/industry but to different countries as well.

7.2.1 Understanding Industry Sector

Getting a good understanding of the industry into which a specific deliverable is about to be contextualized is an important step in preparing for the contextualization. Amongst the subsections to be understood are:

- How the sector of industry is structured (employment, turnover, etc.)
- Where the sector of industry is located
- What kind of activities belong to the sector of industry
- What kind of occupations belong to the sector of industry Evaluation frameworks – have been developed and are used for each deliverable
- What kind of skill levels are required from the employees of the sector of industry

This kind of information can be obtained from the industry reports, general government statistics and other publications.

7.2.2 Understanding Country and Language

For the contextualization to be successful it is vital that the persons responsible for the process have an understanding of the local culture and language. On a practical level this means that those responsible for the actual contextualization are either native inhabitants or somehow have acquired a substantial level of understanding of the locality.

For the purposes of SILVER project this is fairly easily achieved as participants from the six university are responsible for the contextualization in their country. However when the SILVER toolkit is applied in real terms the role of understanding the country is vital. Thus, the SILVER toolkit must be contextualizable to each country.

7.2.3 Understanding IGL and the Deliverable

To be able to contextualize the deliverable it is necessary to have an understanding of the concepts and issues related to IGL, and to be familiar with the toolkit material.

In addition, the deliverable itself must be familiarized. This is crucial so that the team understands the essence of the deliverable that is to be contextualized. Together with an understanding of the industry sector, country, language and IGL it provides the "context" for the actual contextualization effort.

7.2.4 Engaging with Companies

Knowledge of and engagement with the local business sector participants will be a great help in the successful contextualization. Engagement must be done in a proactive manner, starting with an initial contact and then proceeding with regular, on-going contacts.

Networking with the companies will allow the contextualizers to gain an insight into the field of industry and access information that will be useful for the contextualization. Existing networks will most likely prove to be the most effective starting points for engagement.

It is important to be able to show the representatives of the company that the relationship will be beneficial for the both sides.

7.2.5 Contextualization

The four steps introduced in the earlier sections are meant to be performed as a preparation for actual contextualization. Through completion of these steps the persons responsible for implementing the contextualization on a practical level will have the necessary knowledge and skills for successful contextualization. The contextualizer(s) should also have confidence to contextualize the deliveries of the project.

Contextualization includes the following steps:

- Contextualization of language elements of the toolbox contents
- Contextualization of visual elements of the toolbox contents
- Contextualization of the material aimed to the trainers
- Contextualization of the instances of the Web-based game

In most cases the contextualization process should be performed by a specific team that consists of experts of different aspects of the contextualization. See roles and responsibilities.

7.2.6 Review

During this stage the process and results of the contextualization are reviewed. Based on the review a revision to the contextualization can be made. Thus the review process allows us to produce contextualization that offers a better fit to the specific problem at hand.

The review can also be used to reflect on the things that were learned during the contextualization phase of a specific deliverable and gather data regarding issues that should be implemented differently in the future. This allows those responsible for the contextualization to gain new knowledge related to the contextualization process and to issues related to the industry sector, country and IGL itself.

7.3   Roles and Responsibilities

The following roles should be considered when starting a contextualization effort.

Table 1. Roles and Responsibilities

Role	Responsibility
Project leader	The project leader is responsible for the overall contextualization effort. He/she must also engage other workers to take part in the contextualization work. In addition he/she is in charge of reviewing the contextualization and making any needed changes into the finished product.
Industry expert	The industry expert provides the necessary knowledge of the sector/industry to the contextualization process.
Country	The country expert is responsible for providing necessary knowledge about the country

expert	to the contextualization process.
IGL expert	The IGL expert is responsible for providing the understanding about how to perform intergenerational learning. In smaller contextualization efforts project leader can substitute as IGL expert

In most contextualization projects one person can take multiple roles. In the SILVER project, the leader, country expert and IGL expert are in most cases the same person. The most important role is the role of the project leader. Other roles are optional and depending on the size of the contextualization effort they can be omitted.

8 Methodological Guide to Developing Train the Trainer Workshops – Deliverable 5.4.1[5]

The following document provides a step-by-step methodological guide to planning Train-the-Trainer (TtT) workshops within the context of intergenerational learning. TtT workshops are systematic learning environments for those who are or who will be responsible for training others. This guide will present the general guidelines that should be followed to ensure effective planning and smooth implementation of the workshops. It will then explain the specific roles and responsibilities of those involved in the process and conclude with quality controls for evaluating the process.

8.1 The process of developing and implementing Train-the-trainer workshops

1. Define the topics

The first step in planning any workshop is to clearly define the topics that will be discussed and emphasized throughout the course of the event. This will ensure that potential participants have proper expectations for what will be achieved during the workshop.

2. Specify the target groups

The more that is known about the target group, the better the workshop can be adapted to their needs and interests. For this reason, detailed information should be gathered about potential participants in the workshop and also about the future clients that these participants will train.

3. Specify the purposes and aims of the workshop

In order to effectively develop the contents of the workshop, you first need to define the purposes and aims of the workshop. The knowledge and practical skills that participants will gain through this workshop should be clearly defined, as well as the reasons why this knowledge and these skills are important in their work as trainers.

4. Develop the contents of the workshop

The contents of the workshop should be formulated with reference to the previously developed aims and to the needs of the target group(s). The content should be organized into explicitly defined modules, with each module having its own set of aims. A module should be planned to reflect on the participants' previous training experience and on their expectations of the workshop.

5. Determine the teaching methods

Once the content and the aims of the workshop are laid out, teaching methods should be developed that will enable the group to reach those aims. The training methods should be related to the teaching of content and aims.

6. Specify the necessary (need to have) and the ideal (nice to have) resources and conditions of the workshop

In terms of the necessary/ideal resources and conditions of the workshop, some of the factors that should be taken into account are the number of participants (the number should range from acceptable to ideal), the number of required trainers, the equipment necessary to reach the aims

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of the workshop (including physical materials, technics/computers, etc.), and any other requirements for the workshop setting.

7. Develop a time management plan for the workshop

A time management plan should be developed at the outset that takes into account the time necessary for planning the workshop, the appropriate duration of the workshop itself, and the evaluation period following the workshop (which could also include feedback periods and follow-up meetings). In terms of the actual workshop, it should be determined how many hours each content module requires to reach its aims. This should include time for reflection. The time management plan should be flexible so that the workshop can adapt to the particular needs of the situation.

8. Determine the evaluation criteria and prepare the evaluation

In order to be effective, an evaluation needs to be planned prior to the start of the TtT workshop. The following factors should be considered when preparing the evaluation:

- The planning of the evaluation must specify which information should be collected, the operationalization of the required information (e.g. an evaluation questionnaire), and a description of the analysis of the data collected.

- Whenever possible, choose a pre-post-follow-up design to evaluate the workshop.

- Evaluation is more than just writing down what was done in the workshop. The evaluation should be comprised of the following parts: (i) the acquirement of knowledge (i.e. learning in a narrower sense) and the learning of procedures (i.e. behavior/change of behavior potential); (ii) the use of learned knowledge and application of procedures (intended or real use, i.e. particular results of the workshop)

- The evaluation can assess other parts of the process as well, such as workshop organization, the competencies of trainers, and the benefits that the workshop participants gained from the skills of their trainer.

8.2 Roles and Responsibilities: Involved players

The roles and responsibilities of the following parties should be defined:

- The organizers of the TtT workshop

- The trainer(s) of the TtT workshop

- The participants of the workshop (who are also trainers)

- The clients of the workshop participants, who will be trained by them in the future

8.3 Minimum Quality Requirements and Quality Controls for Evaluation

Minimum quality requirements are the textualization/ written description of the mentioned parts of the training design. For quality control, the written materials for the preparation of the TtT workshop should be reviewed with the following points in mind: clarity of the topic, contents and purposes of the workshop; the depth of knowledge obtained about target groups; clarity of didactics (training methods, training environment, time and resource requirements); integration of purposes, contents and didactics; and specification of the evaluation (including evaluation criteria).

9   Methodological Guide to Testing and Evaluation – Deliverable 5.5.1[6]

The current guide aims to ensure that all partners of the SILVER Project follow similar criteria to testing and evaluation of the relevant tools. The guidelines provided represent a general framework for quality assurance in testing and evaluation and refer to Deliverable number 5.5.1 of the project.

9.1   Contextualization

Based on the description of the SILVER project texting and evaluation will be performed by all partners in different organizational sectors. This division has already be clarified and agreed by all partners in the kick-off meeting. The contribution of all partners to testing and evaluation provides several benefits to the project. Firstly, all deliverables produced in this phase will be contextualized in partner countries and sectors providing significant inter-cultural and inter-sectional information about the efficacy of the outputs. The collaboration of partner countries will ensure that different tools will be immediately available to end-users for practice. Thus, each partner plays a crucial role in testing and evaluation to ensure that the tools can be effectively utilized by end-users in all partner countries.

9.2   Participants Selection

Each partner will collaboratively work with four different organisations in their designated sector, based on the following criteria:

1. Diversity – The selection of the organisations should have diverse characteristics, if possible, related to the number of employees (large, medium or large), the number of age-diverse groups, the structure of the organization and the legal entity (public, private etc.)

2. Awareness – The organisations should be fully aware of the processes of testing and the specific requirements that will be expected to ensure their contribution to the project.

3. Willingness – The partners should ensure that participant organisations are willing to work collaboratively to ensure maximum outcome in terms of learning, training, trainers and implementation.

4. Efficacy – Each participant organisation should work collaboratively to provide feedback on the tools in order to evaluate their efficacy and adapt, if necessary.

9.3   Testing

The testing phase is very important in the aims of the work packages and deliverables. All steps should be carefully followed to ensure that all partners are using the same method both in the testing and evaluation phase.

Step 1: Description of the sample –involves a description of the organization and the people who are participating in testing.

Step 2: Description of the procedure – How was the data collected? What was the context in terms of location and duration?

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[6] Author: Antonia Ypsilanti - South East European Research Centre, Thessaloniki, Greece

Step 3: Data analysis & Writing up results – all partners should be clear about the result section in order to merge data from different countries and sectors to produce a unified report. If quantitative data needs to be analyzed using content analysis, all partners should agree upon the technical parts of this analysis. In relation to quantitative data, a report should entail the technical specifications (e.g. programs used) and the presentation of the results. It is important to be clear and concise in writing up results, in language that is accessible to all. If necessary, proofread the results before finalising the reports to ensure the clarity and consistency across countries and sectors.

Step 4: Evaluation by the participants– it is vital to receive some feedback on the testing and training process by the participants to understand their perspective and reflection. All partners will use the same method (self-report questionnaire) to assess the efficacy of the tools from the participants' viewpoint. This process will provide significant information on the improvement of the tools before their final launch. This step is particularly important in the development and testing of the IGL game prototype to improve the final version. Some of the important measures of the evaluation of the IGL game refer to the readability of the instructions, the level of interest and difficulty of the actual game and the degree of perceived learning.

Step 5: Evaluation –identify best practices and practical problems that are important for future reference. What went right, what went wrong? What are contextual or practical problems (loss of interest, too long, too hard etc.)? This report will include a reflective part on the efficacy of the instruments in relation to learning outcomes and implementation particularly in contextualization to each sector.

Some of the important points to consider for intervention testing and evaluation include determining the person who will be testing and evaluating the tools. In order to divide roles it is essential that all parties involved in this process have good understanding of the technical and practical issues involved. The researchers should be able to manage the tasks within a reasonable timeframe, and to obscure any misfortunes that may occur during testing. This will ensure that participants will not be warred-out and demotivated to participate. One of the important aspects of learning whether that involves training the trainers or teaching IGL to the employees through games, is linked to the perceived relevance and application to the workplace environment. This increases the motivation for participation and good performance. Therefore, it is significant to highlight this relevance to the trainers in order to achieve their willingness and collaboration for the best learning outcomes.

10 Methodological Guide to Researching Intergenerational Learning – Deliverable 5.6.1[7]

The following guide aims to ensure that all partners of the SILVER Project follow similar criteria when researching IGL. The guidelines provided represent a general framework for quality requirements, implementation, and responsibilities when researching IGL.

10.1 Minimum quality requirements for each aspect of the process

- Research objectives - The research objectives should be clearly defined, attainable in the given time framework, and measurable to allow the progress report.

- Research hypotheses - The research hypotheses should be well defined and integrated into a guiding framework. This framework will be the reference system for results interpretation.

- Research design – This design should contain the methods used for investigation, information collection and processing, and results interpretation. Also, it should contain a time framework for performing the research.

- Results interpretation – Results will be interpreted in concordance with the initial hypotheses, research limitations, and the given context.

- Research conclusions – These conclusions should reflect the essence of the research findings and the step forward from the initial state of knowing to the new one. It is important to evaluate how much these conclusions can be generalized and transferred to other contexts.

10.2 General guidelines for smooth implementation

- Semantic fields – It is important for all participants in this research process to have the same understanding of the fundamental concepts, like: generation, knowledge transfer, learning, intergenerational knowledge transfer, intergenerational learning, ageing, knowledge loss, knowledge retention.

- Knowledge level – It is important for all participants to make the effort of upgrading their knowledge in the field of this research, such that there is a compatible level of understanding and performance each phase of the research.

- Research area selection –Due to the very large spectrum of possible research areas, it is important that each team selects the research for which there is significant experience, understanding and previous research done.

- Fluid communication – During the implementation of this research project teams should communicate effectively in order to exchange knowledge in an interactive way to the outcomes.

- Synergy – Synergy is important and it can be realised through the network effect and a creative project management.

10.3 Specific roles and responsibilities

These roles and responsibilities have been established through the content of the SILVER Project and then discussed and decided during the kick off meeting in Haarlem, Inholland University of Applied Sciences. During the project implementation new assignments could be decided based on progress reports and eventually new targets.

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[7] Author: Ivona Orzea - Academy of Economic Studies of Bucharest, Bucharest, Romania

10.4 Quality controls for evaluating the process

Quality project management should be distributed in time and on all process phases. That means that at the end of each phase should be an evaluation of the outcomes, and a comparison with programmed and expected outcomes. Eventual differences should be discussed and explained. The nature of research means that findings cannot be anticipated fully and differences between projects may appear.

11 Methodological Guide to Writing Handbooks – Deliverable 5.7.1[8]

This document has been designed as a methodological guide to writing a handbook for the SILVER project. The guidelines provided are to ensure all partners work towards set criteria and produce high quality handbooks as part of the deliverables of the project.

11.1 The Process

1. Researching the topic

This is the initial stage in which all the relevant information needs to be gathered including current policy and practice. It is important to know the audience and be continually aware of them and their needs when data gathering.

2. Deciding the content

The handbook must contain information that is important to know. It should also consist of information that applies to everyone involved. It is best avoid selective policies whenever possible.

3. Planning the handbook

There are many things to think about in the planning stages of the handbook. These are outlined below;

- Structure – Begin with an overview of the project including its purpose. Include a step by step guide. (This will be the largest section of the handbook. It should cover both technical and operational procedures in minute detail, so someone can follow what should be done 'step by step'. It is useful to include a checklist of requirements. (This is a list of everything users need to participate in the project phase. Include any basic things like equipment, logins, internet access and permission. Include project-specific information such as software versions, technical specifications, agreements with third parties and pre-start testing.) Include contact details of project managers and other important contacts relevant to the project. It is good practice to end the handbook with some information on the next steps or phase of the project.

- Consider the length of the handbook – It is important to be clear and concise with the information given. It can be tricky to find the balance between enough information and too much, often it is better to start writing a little more than you might need to edit and condense later.

- Plan the design – It is important for the handbook to look both appealing aand accessible to the specific audience. Think about what each page will look like and how to convey the information using things such as pictures, charts and tables, text boxes, bullet points, etc. Choose a colour scheme to work with.

4. Writing the handbook

When writing the handbook it is important to follow some basic rules.

- Keep it simple – A handbook should be written so that a variety of people can understand it. Use simple sentence construction, avoid passive voice, and don't use wordy legalese. A handbook should be actionable and concise. When choosing an important word, think carefully if there is a simpler synonym that could take its place.

- Include things such as – Do's and Don'ts, Top Tips, Case Studies, in order to break up the hard information and make it as engaging as possible.

- Reference all sources – It is important to provide correct referencing for all the sources used, this diminishes any issues regarding legality and provides interested readers with reference points.

- Proof read and fact check the handbook – A handbook will usually be a reference point for everyone involved, have test readers go through the first few drafts to ensure that the information is being communicated. Set aside some time to perform fact-checking duties to verify that the information in the handbook is both correct and current.

11.2 General guidelines for producing a handbook

- Content – Deciding what to include in the handbook can be a challenge. Include enough information to make the handbook useful, but not so much that it straightjackets your activities.

- Clarity – The handbook may cover all the bases, but if it is cumbersome and indecipherable it has no value because no one is going to take the time to read it. Be as simple and concise as possible. Remember: the key is readability.

- Consistency – The basis for most confusion is inconsistency. Avoid including policies and procedures just because they seem like a good idea. The policies and procedures covered in the handbook should apply to everyone involved.

- Create and stick to a timeframe for the whole process.

- Decide on a budget for the process.

- Create a handbook that is able to be updated and renewed alongside any changes.

- Create and maintain clear roles and responsibilities for everyone involved in the process.

11.3 Specific roles and responsibilities involved in the process

- Divide up roles using individuals skill set e.g. researcher, writer, graphic designer.

- Be clear about the aims and outcomes of each role.

- If there is a project manager make it apparent.

- Work together and keep everyone informed of what others are doing.

11.4 Quality controls for evaluating the process

- Do a trial run. Produce a draft handbook before printing to give to a sample of people who it will be aimed at, and collect their feedback.

- Redraft the handbook using their comments.

- Collect feedback on the wider process of producing the handbook from all involved. Use feedback forms or group discussion.

- Make changes/improvements from the feedback gained.

12 Template framework for 'State of the Art' reports

This document has been designed as a framework for 'State of the Art' reports, including summaries from partners.

In work packages 2, 3 and 4 a report on the 'state of the art' is a required deliverable. In the proposal it states that each partner will contribute to this report by looking at what is being currently done in the sector they will be testing in, in regards to each type of tool and IGL. Take the SAP for example. We (Inholland) will deliver a summary of programs that are currently being implemented in the Netherlands that are of concern to the SAP, such as organizational awareness programs being implemented in management consultancy or accounting firms.

In order to structure the summary I propose we all use the same framework, which I introduce below, as a template for these summaries as for structuring the data (i.e. case studies) within the final reports themselves. It is based on what is called the CIMO-logic and is one way that organizational change programs are analyzed. The way it works is shown below, using Inholland's sector as an example in regards to the SAP. The different cases can be taken from either desk or field research. (Please note that this example I made up for purposes of illustration.)

C = Context. This is the 'environmental' context in which the program has been, or is being, implemented, including the problem being addressed.

Example: The finance department (75 employees) of a SILCO, a large (1200 employees) management consultancy firm is about to lose many of its employees to early retirement in the next five years. Management was concerned about a sudden dramatic loss of knowledge and skills and wanted to start working on ways to avoid these losses from being too devastating. One of the ways they think this could happen is to assure more and better interaction among younger and older workers that would stimulate knowledge exchange and learning. But management was worried because they see different cultures split along generational lines and wanted to first try and improve understanding between these groups.

I= Intervention. This is the type of change program or intervention that is being implemented. Please include any points (for example critical success factors) you think might be important concerning the implementation.

Example: Management implemented a communication campaign aimed at lowering stereotypes in the hope that groups would approach each other easier. In the campaign, stereotypes blown out of proportion to the point of absurd. An implementation critical success factor here was that posters were made using real employees who had agreed to be part of the campaign.

M= Mechanism. This is what makes the intervention work by triggering different attitudes.

Example: Employees started laughing with each other about the caricatures of the different generations, creating common ground for interaction.

O = Outcome. This can be a direct (expected) outcome, or a final (expected) outcome or both. It depends on how much data is available and if it is longitudinal. Please indicate if the intervention was effective or not.

Example: As a result of the campaign, managers saw more interaction between older and younger employees and deemed it a successful intervention (direct result based on anecdotal evidence). Another example could be; a quantitative survey and interviews were done as part of an evaluation of the campaign and showed it was in fact effective.

Please do not feel too constrained by this framework. If you need to add important information somewhere, go ahead. Also indicate if the case comes from field or desk research and the source if from the latter.

13 Deliverable Evaluation Form

This form has been designed for project partners to use as a tool for evaluating each deliverable.

Project SILVER: For internal use only

Deliverable Evaluation Form:

Number and name of deliverable : _____

WHAT is being evaluated? Write a one sentence description of the deliverable, including page of proposal where the original description can be found.

WHO is evaluating? At least one other project member not involved with the development.

(Write Name and affiliation: _____)

INDICATORS:

- Adherence to general quality as found in the templates
- Adherence to general scientific standards
- Adherence to general industry standards
- Clarity for third-parties

QUESTIONS:

Format of deliverable	yes	no	n/a	Comments
Was the correct template used appropriately?				
Does the deliverable format adhere to scientific standards for publication? (APA style, etc)				
Does the product have a professional appearance?				
Are graphics (figures, tables, etc) employed effectively?				
Is proper language (register, usage, spelling) used?				
Miscellaneous				
Tool/deliverable content	**yes**	**no**	**n/a**	**Comments**

	yes	no	n/a	Comments
Was the appropriate methodology used and reported on properly?				
Were the correct protocols used appropriately?				
Is the final version of the deliverable consistent with the description in the project proposal?				
Does the product meet industry standards?				
Are all instructions pertaining to the deliverable clear to third parties?				
Was the testing clearly effective and representative?				
Does the deliverable convey its information effectively?				
Other factors	**yes**	**no**	**n/a**	**Comments**
Was the information disseminated appropriately and effectively?				
Is the deliverable the correct tool for achieving its purpose?				
Miscellaneous				
Follow-up	**yes**	**no**	**n/a**	**Comments**
Have all partners had the opportunity to contribute to the deliverable?				

1. What are the main strengths of this deliverable?

2. Are there any weak points?

3. Can you see any problem areas for the deliverable that must be improved?

4. If so please suggest some measures or ways for solving the problem(s)

Thank you very much for taking this time to evaluate the deliverable!

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