Qualitative Services at local level for Emigrants and Refugees

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Deliverable IO3

The Impact Circular Model

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Q-SER Consortium

The Q-SER Consortium consists of:

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Version History

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3.0	D.IO3 – Minor modifications	Drosostalida	28/02/2020

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1. CONCEPT AND AIMS OF THE IMPACT CIRCULAR MODEL IN Q-SER PROJECT

The Impact Circular Model has been specifically designed to be used in an organisational level. This allows an organisation to set long term strategy goals and aims to reach set objectives. An organisation, whether it is public or private, can use the Impact Circular Model to improve one or several departmental goals by applying the theory of the model. This document outlines the description of the model, its theoretical application potential as well as guidelines of use.

What is the difference between the IO3 Impact Circular Model and the IO4 Circular Cycle of Mentoring Model?

As the Q-SER project provides tools and methodologies for municipality staff to up-skill themselves, the two models have been designed to cater for them as well as propose application features at two distinct levels.

- IO3 is the theoretical depiction of the model targeting a high-level approach by any organisation. This high-level approach allows for strategic planning and long-term goals and aim definition. The IO3 model offers the approach and methodology to use, while, suggesting possible tools and approaches of application and use.
- IO4 on the other hand, targets the actual organisation staff and provides a practical approach with hands-on tools, templates and information to facilitate their progression into e-mentors as well as the acquisition of the necessary knowledge to reach their goals.
- Organisations: can use the IO3 Impact Circular Model to address issues identified within their organisation and creating a strategy of implementation
- Staff and e-mentors -IO4: Putting in place the necessary framework and tools to allow for re-training, up-skilling and development of e-mentors to lead the change.

IO3 Description

The Impact Circular model integrates the overall notion of the Q-SER project and its transferability and adaptability to other organisations displaying project results impact. Model can be used by any organisation willing to adopt the Q-SER results within their structures. The model serves as guidelines of use, application information, examples, information material etc. and comprise of several parts facilitating the new organisation's uptake and reuse [Circular]. Moreover, it allows new applied models to be exported to other target groups (TG) and impact measurement tools, thus, circular impact is displayed.

The components of IO3 Impact Circular model are:

- Guidelines for the organisation in terms of preparation for uptake and use.
- Information on non-formal education used, tools and methods but also good practices.
- Definition of Impact Circular Model and how they are optimised and applied to offer results and benefits.
- Criteria and checklists for organisations will be available enabling their transferability to their systems, environments and target groups accompanied by manuals of use. The checklists

and manuals provide uniformity in model application allowing for enhanced application success rates.

The IO3 Model will provide a detailed explanation to the organisations on its usage as well as include tools and methodology on its implementation and adoption by any interested organisation. The below document presents the IO3 model in detail, elaborating on each step, aiming at addressing well needed guidelines for organisations working and dealing with the Q- SER Target groups.

The Impact Circular Model (IO3) targets change at an organisational level allowing organisations such as local/ public to:

1. Improve the organisational culture in one area (i.e. In the project Q-SER that of handling immigrants),
2. Improve the organisation's communication tools and information,
3. Adopt a common communication strategy for handling immigrants,
4. Enable staff to commit to serving all clients to certain standards,
5. Collect internal knowledge and know-how, re-use / re-purpose and transfer to other departments,
6. To be able to conduct knowledge management and build a database / repository of good practices and know-how (tacit knowledge),
7. Provide mentoring facilities and support structures to help staff become e-mentors.

1.1. Methodological paths

The Impact Circular Model is a multi-faceted model allowing services and information provided to be re-used by new/other users. It is a model which include needs analysis tools, tool usage, service provision, evaluation, analysis and re-use based on own experiences and gained insights. For the sake of this report, the topic and issue to be utilized as an example, is "Communication".

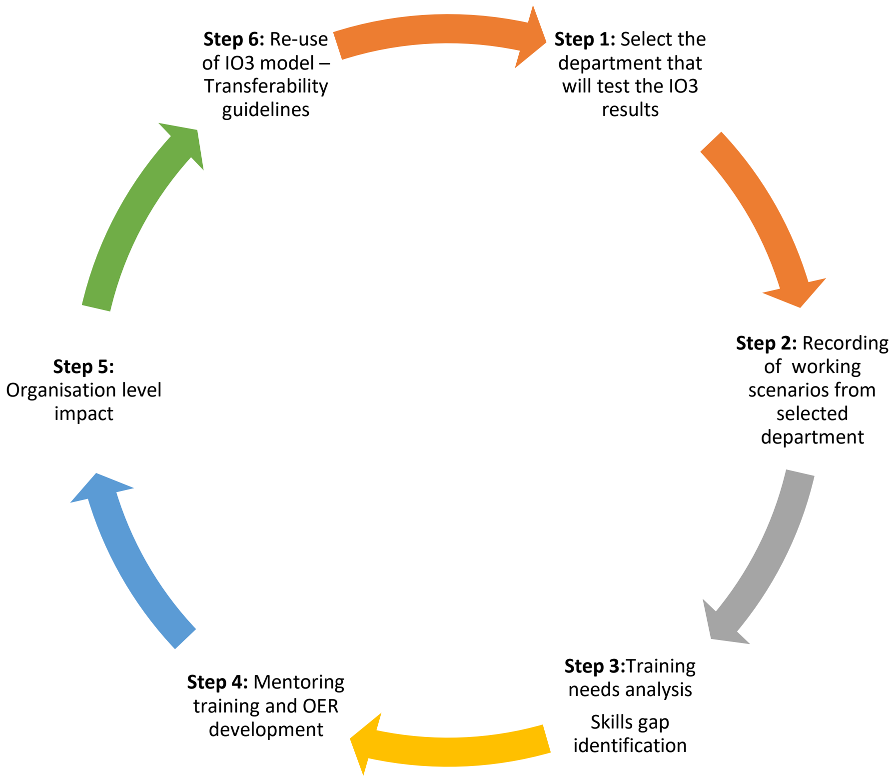
The Impact Circular Model:

1. Focuses on the Communication strategy on one given topic,
2. Allow for the adoption of one common communication strategy for handling immigrants:
   - Serve clients (immigrants) following a certain standard in communication and by delivering services
   - Able to re-use information and transfer to other departments. In the process, the mentoring aspect has been analysed and discussed allowing for interested persons to follow respective training (IO4) and become e-mentors thus, guiding new employees to adopt the strategy

The benefits of the Impact Circular Model of Mentoring are that experience, and insights are shared with more people, more quickly – more people can benefit. It's very unlikely that a problem or challenge one person is experiencing is unique. It is most likely that an employee will be faced with a challenge or a problem related to dealing with / responding to requests from migrant service users, which is common with the corresponding cases faced by other colleagues. The ability to exchange experiences through the existence of a model of information dissemination, case analysis and presentation of problem-solving models and emerging good practices is a very useful process which is the core of the Impact Circular Model.

1.2. Application method

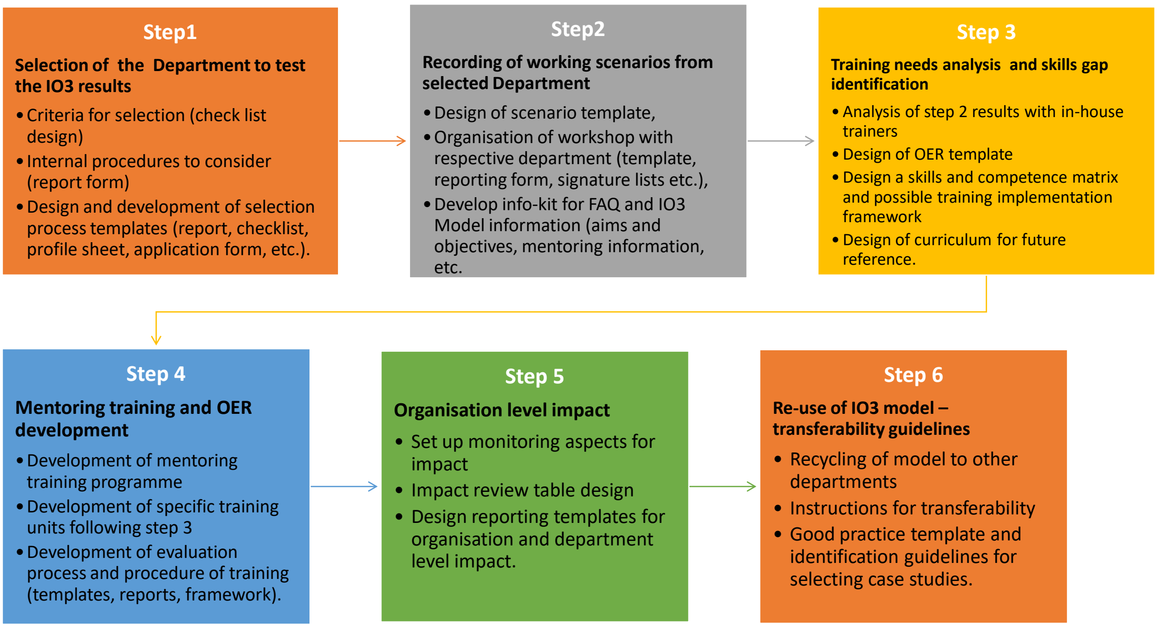
The following is a schematic presentation of the methodology followed by the Circular model, in order to briefly identify the fields of research and intervention:



2. DETAILED IMPLEMENTATION STEPS

The below steps depict how the IO3 model's implementation is suggested to take place in any one organisation. These steps are presented here on a high-level perspective with key actions in place.

Table1: IO3- Steps for implementation



2.1. Step 1: Selection of the department to test the IO3 results

Selecting the Department is a key step for an organisation since it signifies the application phase and area of application. The organisation needs to follow certain sub-steps in order to complete this phase. Primarily, it will have identified the strategic goals it needs to comply to, to subsequently, allow for selection and implementation. Selecting a department or group of people who will participate in the Impact Circular Model application requires the following:

1. **Criteria for selection** (check list design). A check list needs to have been properly prepared, which will be of a generic composition. The generic criterial selection should have been prepared by a person or a group of people aware of the department's characteristics, training needs, daily activities, reporting formats and HR issues. In addition, the check list for selection of the implementation area, should include questions / topics such as: need for change, transferability potential, impact quotas and levels, number of people to be targeted, target groups of implementation and application as well as department goals and aims. Cooperation with a respective team member from the target department should be envisaged.

2. **Internal procedures to consider** (report form). Moving to the next point, the responsible person for the selection should consider any internal procedures that might apply. These procedures can be legal, procedural, departmental or else. When drafting the selection report and guidelines / checklist, a short introduction on processes needs to be included. Each

organisation collects this type of information and data thus, retrieving and documenting it is imperative.

3. **Design and development of selection process templates** (report, checklist, profile sheet, application form, etc.). Following the collection of point 1 and 2 data, the responsible person / department is now able to draft the actual selection process templates. Having collected information on target groups, target aims and objectives, but also internal process information, the templates that can be created, are the following:
   - Introduction to the selection process (text) stating aims and objectives
   - Step by step process for selection (text)
   - Checklist for selection of a department (Checklist)
   - Reporting form for internal procedures – checklist and report text format
   - Forms for the actual selection process
     1. Profile department form
     2. Personal profile form
     3. Personal application form
     4. Evaluation form
     5. Impact form
     6. Report template

2.2. Step 2: Recording of working scenarios from selected department

The next step to elaborate upon is the design, development and collection of working scenarios to be used in the pilot session. This will aid the departments to work on a particular topic or issue identified and to reach the above stated aims and goals. Having explicitly described the aim, the selected department needs to also describe the topic at hand. One example that will be elaborated is "Communication with immigrants/foreigners in a Municipality's kindergarden department". Communication meaning handling most common requests by foreign parents and how kinder garden teachers deal with them. Scenarios of use will be drafted together with their respective templates to be used by teachers, department managers, and supervisors. The aim for a department is to organise a workshop where the scenarios of use will be worked upon, collection of results and workshop activity, report writing and creation of an FAQ section for future use.

Preparation by organisation:

1. **Design of scenario template**: Prior to all activities a scenario template needs to be elaborated by the responsible people. This entails proper awareness of how the department works in order for fully qualified scenarios to be build. There are several possible methods to design and create the scenarios however, for the example the following will be used: a) recording of new scenarios through a brain storming session, b) organisation of a workshop and collection of real case studies from the target group at hand which serve as

scenarios. The first step in this process is the actual design of the scenario template. This needs to contain the following information points (non-exhaustive list):

1. Title of scenario
2. Date and duration of scenario
3. Target group and profile information
4. Number of people to participate and moderator information
5. Aim of activity
6. Scenario description and questions for participants
7. Note for moderator
8. Infrastructure needed for workshop organisation
9. Evaluation information (nr of people participated, assessment, etc.)

2. **Organisation of workshop** with respective department (template, reporting form, signature lists etc.). When the scenario has been drafted the workshop elaborating the scenario will be organised. Organising a workshop in a public sector company might require additional preparation time as formal in-house processes demand added planning activities. The documentation needed for the preparation of the workshop is the following:

   1. Signature list for the participants
   2. Agenda (topics + timeline) for the workshop with speakers, moderators and workshop leader names
   3. Location of workshop information – updating information on company's social media or other channels to attract participants.
   4. Handout for workshop and material for moderator
   5. Handout material for participants i.e. a workbook.
   6. Assessment template with questions for the participants. This is an important step as it will determine gaps in communication with the set target groups or gaps in dealing with the scenario at hand. The moderator or trainer, can use this information to create training units or open educational resources (OERs) for the participants or employees of the organisation. The way the assessment templates is structured is of essence if training needs gaps is the objective of the specific form.
   7. Impact evaluation form for the organizer.

   Following the preparation of the workshop, the moderator / organizer / leader needs to collect all evaluation and data and prepare a short report that will a) provide valuable input for their department and how the workshop has had an impact, b) provide information on how the workshop results can feed into existing practices and enhance communication with foreigners, c) record additional scenarios that might have been identified during the workshop, d) record any issue or difficulty acknowledged by the participants during the workshop. The workshop should be repeated for at least 2-3 working scenarios have been worked upon.

3. **Develop info-kit for FAQ** and IO3 Model information (aims and objectives, mentoring information, etc.). For each of the above steps, it would be optimal to record all information collected, all questions answered, and all scenarios worked upon. This will allow the organiser to create a Frequently Asked Question section either online or in a folder always available for any participant or future workshop organiser. The info-kit will contain both information in a report form but also template forms for others to use. An online info-kit is easily accessible by any and can be downloaded and used with slight moderation by other departments. What needs to be kept in mind is the fact that the information kit can be translated and transferred to other target groups when dealing with a big organisation.

2.3. Step 3: Training needs analysis and skills gap identification

During a workshop where specific scenarios and topics /skill are discussed and analysed, a trainer has the opportunity to identify and record specific training needs related to the topic at hand. Should this be the aim, the trainer needs to record the a) skills gap in working with a set skill and b) the training need associated with it in order to locate the related training material or activity to cater for it. Training need analysis and skill gap identification is imperative in any organisation as it focuses on lifelong learning opportunities and motivation for the employees to up-skill themselves. The trainer at hand, has the responsibility to identify, record, create training material and if possible, teach the target groups. The preparation involves:

Preparation by organisation:

1. **Analysis of step 2 results** with in-house trainers: all results collected through the workshop or scenario discussion can be analysed using specific templates by an adult trainer provider. Observation techniques, role-playing, assessment and other methods can be used to identify the training need gaps. Following the identification, the trainer records the skill gap and / or topic gap together with learning objectives and possible assessment methods.
2. **Design of OER** (Open Educational Resource) template: OERs are widely used and can easily be transferred to any interested group or individual interested. In order to comply to international standards, the template to be used by the trainer can include the following metadata information:
   - Title of the OER
   - Topic and subject (if part of a larger course or if autonomous resource)
   - Duration and language of OER, keywords
   - Learning objectives
   - Content of training – complete with video link, photographs, text and other media. Pictures can be used which are copyright free. The trainer can use free online resources such as Pixabay.
   - Assessment / evaluation of the unit. This should link back to the learning objectives and should be measurable and concrete
   - Additional resources and links for extra reading
   - Bibliography / reference section.

3. **Design a skills and competence matrix and possible training implementation framework**. The skills and competence matrix might prove to be a very helpful tool for any organisation to have since it will allow to pinpoint skill sets of new employees that enter the organisation. Moreover, it will help trainers create a library of themes and learning resources equivalent and relevant to the skills framework. If the skills set is designed as a table, it will also serve as a tool for management to set long term strategic goals for training and education inhouse. If a trainer wishes, they can also design an implementation framework as template that will allow other department managers use the model to create respective training sessions for their employees.

   The training implementation framework should contain practical examples and suggested learning paths for employees. Since the working theory is communication strategies with the use of scenarios, the implementation framework can use the scenarios as a starting point to create the learning paths.

4. **Design of short curriculum** for future in-house training or reference. The final stage in this step is to create a short curriculum stating all modules and units designed during the process. The curriculum can be in the form of a table containing information such as course, module and unit title (in case of a course), course duration in hours, assessment methods proposed. The curriculum can be further utilised and updated as the organisation grows or as need permits. The trainer can also design a template curriculum to be used as a generic file by their peers.

2.4. Step 4: Mentoring training and OER development

As the organisation has designed and developed the infrastructure and contents of the training and workshop organisation, the people who would attend would be in the position to implement in their work, the scenarios taught. They can through their everyday activities, apply their new knowledge and skills to their work routine. The organisation should at this point design a mentoring process as a support structure to guide and provide for their employees. The mentor might differ from the actual trainer of the sessions, thus, a mentoring programme (training) should also be put in place. As this relates to IO3, the approach taken should be theoretical allowing for the development of a mentoring training programme, complete with description of units and modules. To measure impact and transferability in the organisation and the department, an evaluation process needs to be put in place. Below the steps

Preparation by organisation:

1. Development of mentoring training programme. Prior to any programme development, especially that for mentors and e-mentors, an organisation needs to have clearly recorded its training and support processes to be able to offer mentoring training and support to its employees. The design of the mentoring training should have as objectives to: a. create e-mentors and b. allow for the new mentors to be able to guide employees in addressing and adopting the organisation strategies and goals.

2. Development of specific training units following step 3: The organisation needs to have designed unit content templates and module templates, complete with instructions of use and training delivery aspects. Following the organisation’s characteristics, what can be included in the unit design are methods of delivery specifically purposing the respective organisation

such as: role play activities, scenarios and decision making activities, multimedia and interviews with other mentors and employees active in the mentoring process delivery or training, pictures and audio files etc. The unit training template design needs to cater for all the above, including metadata information and fields that will allow its subsequence development into SCORM files and possible uploading on related Learning Management Systems.

3. Development of evaluation process and procedure of training (templates, reports, framework). Assessment and evaluation are key for any training programme or activity within an organisation since it allows for impact and indicator providing references utilised in future planning activities. Impact should be measured both short term and long term feeding into the system on various levels. The necessary templates should be designed and allowed to be modified to suit individual departmental needs and interests. Assessment can be varied, again suitable to each organisation. In either case, the necessary templates should be designed in cooperation with trainers, department heads and/or managers to allow for multiple results to be used at different levels of management.

2.5. Step 5: Organisation level impact

As all activities pertaining training and education within an organisation, are of extreme importance, the impact they yield should be measured. At an organisational level, the data collected should be distinct into the following categories (non-exhaustive list):

- **Organisation level** i.e. how well has the performance of the actual training been
- **Department level:** the performance of the department on dealing with the target groups on the specific topic at hand. One indicator can be the number of complaints received or the number of immigrants served
- **Staff level:** satisfaction ratio of employees in completing work activities and motivation in serving target group members.

Preparation by organisation:

1. Set up monitoring aspects for impact. The monitoring is a horizontal activity which should be considered in all aspects of design as well as in specific milestones of the project. A close cooperation between departments should be sought in order to collect the relevant data. Each department should specifically declare the monitoring features they can apply, the data required to be collected as well as indicators for the long short and long term. Specific templates should be designed by the involved parties and collated into templates to be used by the departments.
2. Impact review table design. An impact review table should be designed by the organisation to specifically analyse the following aspects:
   - ✓ How impact was reached i.e. which activities were undertaken and by which department
   - ✓ How impact was measured, and which tools were used
   - ✓ How impact was reported
   - ✓ Specific numbers / measurements to be used in strategic planning

3. Design reporting templates for organisation and department level impact. All the above information needs to be reported and the organisation should draft a reporting template for this purpose.

2.6. Step 6: Re-use of IO3 model – transferability guidelines

The overall aim of IO3 Impact Circular Model is to both create an impact but also to have a circular approach, that of being reused and repurposed within an organisation. Having applied all the previous steps, an organisation is now able to re-use the IO3 results within any department. For each step, the organisation has now designed a strategy, the necessary templates and tools to be used, set up the necessary cooperation and networking structures but also created a list / database of collaborators and trainers to cooperate with. Having successfully designed the Impact Circular Model within, they are now in a position to implement strategic changes and motivational attitudinal changes of their staff.

Preparation by organisation:

1. Recycling of model to other departments
2. Instructions for transferability
3. Good practice template and identification guidelines for selecting case studies