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IO4 The Management Tool Box

The toolbox is designed to support the manager of the educational institute. He needs to plan and budget the next year upfront and wants to know what efforts are needed to further improve the quality of Regional Learning and the competences of his staff.

STEP 1	List the desirable competences
STEP 2	Scan staff on regional learning ambitions/ qualities with a selecting tool (a profiling tool on the needed competences in Regional Learning)
STEP 3	Set up your team
STEP 4	Provide training (bridge the gap between here and now situation and desired situation)
STEP 5	Convey a code of conduct
STEP 6	Collect feedback
STEP 7	Evaluate and act

STEP1-2 Rubric competences for sustainable cooperation with entrepreneurs

This rubric describes the competences needed for a successful cooperation with entrepreneurs. Staff members fill in the rubric and answer the questions to find out who best fits in the Regional Learning Team and what training is needed.

Assignment to all staff members: determine your level by choosing the appropriate box whereas A=starter/ beginner; B=advanced; C= extended; D=expert.

Competences	A	B	C	D
Interpersonal skills *Communication with others in all its forms, trust and the ability to listen and understand others*				
General communication skills				
Thinking in processes				
Social and cultural skills				
Intrapersonal skills *Each of the influences that affect the person (and his behaviour) from within. To be divided into the following*				

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factors: - age - phase in the family life cycle - occupation - free disposable income - product ownership - lifestyle - personality - self-image				
Entrepreneurial				
Dare to decide independently				
Flexibility				
Digital skills *Refer to the possibility to use media and technologies in a meaningful way*				
Media wisdom				
Digital platforms are mastered				
Documenting actions				
Thinking skills *Analyse, evaluate and create*				
Creativity				
Problem solving ability				
Critical process thinker				

In order to get a complete picture of the desired developments/ learning wishes, please answer the following questions.
I want to develop my …… skills
I have the next concrete learning/ development question:
To develop myself, I need (kind of help) ……. from (name) …..

Name: Date:

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STEP3 Set up your team

After performing the scan and processing it, it is clear which employees are competent for a place in the team.

You should proceed with the following action plan.

- organise an individual interview with each candidate for a final decision if there is a place in the team for the staff member
- the team will meet for several half-days to discuss the various roles (see also Roles in Regional Learning in the section below)
- based on competences and preferences, the team divides the roles and tasks
- the team develops a plan and discusses it with the management
- the final plan (including a PDCA* cycle) is approved by the management

*The PDCA cycle reflects the principle of continuous improvement and is formed by the Plan-Do-Check-Act facets. This principle indicates that to achieve a higher quality, a continuous cycle of planning actions, implementing planned actions, checking whether the results of the actions really are as intended, and adjusting or adjusting the execution or plans as a result of the check results.

Roles in Regional Learning[1]

There are nine roles for a teacher taking part in Regional Learning:

1. Canvasser
2. Region developer
3. Educational developer
4. Coach
5. Foundation Coach
6. Assessor
7. Expert
8. Actor
9. Learning in a learning network

In the daily practice, a teacher performs not one but multiple roles at the same time. In a small(er) organisation, it is impossible to have the nine roles fulfilled by nine different persons (too few employees, too few assignments, too few students). A teacher is, while coaching/ guiding a student, one moment the expert and the next the assessor. Another moment he is actor or a developer. The teacher must be able to switch quickly between the different roles.

[1]sources: www.groenkennisnet.nl and http://edepot.wur.nl/369968

The main three roles are (based on conclusions of experienced teachers Regional learning):

Canvasser, Coach and Foundation Coach.

To find out on what level the team members are, the manager can use the rubric. The competencies in this rubric are those that are focused on these specific roles. The teachers involved already meet the general skills set out above in STEP1-2 Rubric competences for sustainable cooperation with entrepreneurs.

CANVASSER

As a canvasser, I build and maintain relationships with companies with the aim of winning orders for regional learning. In addition, I have a good overview of the content of programs in our school that are involved in the area of regional learning. With that content in mind, I examine which assignments companies have and we search together for assignments that fit in with our school's courses.

I already perform this role and do not want to develop myself further. I choose where I stand. I want to further develop this role in the coming period. I choose where I stand and where I want to go. I do not play this role and do not intend to do so in the coming year. I do not have to fill in anything.

	A	B	C	D
Networking with the region	Through colleagues I come to assignments for Regional Learning. When parties from the region approach me with assignments, I think along with them.	For assignments I actively search within my existing network.	I am an ambassador for our school in the region. I see new opportunities for expanding my network and take action to interest these new relations in providing assignments to students ...	... and I approach unknown companies from the learning questions of students.

Clarify assignments and translate them	I connect students with existing assignments from companies.	I can translate an assignment from a company to my own training. Then I can clarify this assignment with students and the company to a workable and meaningful assignment	I know what is going on both within the company and within the program and can therefore design new assignments that are then developed into a workable and meaningful assignment for everyone	I know what is going on at multiple companies and training courses and can therefore connect companies and courses in an assignment.
Taking responsibility for maintaining good relationships.	I connect companies and students with each other and inform those involved. These then go to work separately from me.	I connect the company, the students and the involved teacher (s) and make sure that there is a learning agreement (learning quotation) so that all parties know what is expected ...	... and keep an eye on the progress of the project according to the agreements in the learning agreement. I keep an eye on whether the students and the company are satisfied ...	... and follow-up, but without intrinsic interference, the company and the students during the assignment and make sure that both the company and the training are ultimately satisfied with the relationship. I do this by carrying out interim and final evaluations.

COACH

As a coach I guide students in planning, executing, completing and reflecting on the assignment.

I already perform this role and do not want to develop myself further. I choose where I stand. I want to further develop this role in the coming period. I choose where I stand and where I want to go. I do not play this role and do not intend to do so in the coming year. I do not have to fill in anything.

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	A	B	C	D
Planning	I assume that students are planning and I come into action when something is about to go wrong.	I feel responsible for the planning, make this and discuss this with students.	The students make a schedule and together we discuss it	I guide students on the basis of their needs when making a plan.
Coaching on the process	When I see that students / the process are in trouble, I will solve this.	I regularly remind students of their responsibility in the progress of the process and give tips for solutions.	I stimulate the students to ask for coaching themselves and support them in finding solutions without giving solutions ...	... and reflect with them on this, so that they can continue independently in a similar situation next time.
Reporting	I give the students guidelines for reporting ...	... and I give tips to improve reporting ...	... and I let students think about how they meet the expectations of the client with their reports.	I coach students on choosing a reporting form and content that is directly applicable to relevant regional parties (including the client).
Reflection	I ask individual students from time to time what they learn from their project.	I plan fixed moments to reflect with students on the progress and result of the project.	I organize moments to reflect with students on the project and what they have learned from this.	At different moments I reflect on the product, the process and the personal input together with the students and let them develop follow-up goals based on this.

Relationship with parties that are relevant to the assignment (e.g. client, the canvasser)	I have contact in advance and afterwards and I inform the parties involved	I keep the parties regularly informed about the progress ...	... and I adjust expectations if necessary ...	... and I encourage the students to keep relevant parties informed and involved.

COACH of the FOUNDATION

As a foundation coach I am responsible for the proper functioning of the student foundation.

I already perform this role and do not want to develop myself further. I choose where I stand. I want to further develop this role in the coming period. I choose where I stand and where I want to go. I do not play this role and do not intend to do so in the coming year. I do not have to fill in anything.

	A	B	C	D
Coaching to keep the foundation running	I tell the students what they need to do for the foundation to function.	Together with the students I discuss which tasks they need to perform in the foundation and help them to divide these tasks.	I let the students run the foundation independently, look, and make adjustments if I find this necessary ...	.. and I reflect with the students on everything that comes with a foundation and connect it with them to their professional career.

STEP 4 Provide training

Training courses are offered based on the by the team completed rubric. In addition to the outcomes of the rubric, the team can also indicate which development/ learning wishes it has. Because education in the rapidly changing society is changing rapidly too and the role of teacher is shifting from knowledge transfer to a more coaching role, it is smart to offer the training to a larger group of teachers. A strategic move towards the future.

STEP 5 Code of Conduct for Teachers in Regional Learning

To ensure that teachers in Regional Learning adopt the same attitude, the code below has been drawn up. This can be used to make teachers once more aware of the fact that the changed role of the school means that they also have a different role. This requires a lot, but the code can help with this.

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In General

As a teacher with one or more roles in Regional Learning, I know my assignment and perform it as a professional employee. I reflect on my functioning annually with the aid of the Rubric Regional Learning. When I discover that I do not develop or develop insufficiently, I indicate this to my supervisor with the aim of finding and following a suitable training.

I am continuously aware of the fact that I am an important link* between the educational institute, the students and my colleagues, and the client (the outside). I explicitly inform the client of the fact that the executive student is in a learning process. I further act as an entrepreneur with an open eye to possibilities and I think outside fixed frameworks. I am flexible, enthusiastic, proactive, open, sensitive to atmosphere and culture and I communicate clearly and transparently. I can ask the correct, open, questions without filling in anything for the other.

*Dealing with external contacts

The criteria for this part of the code are based on the situation in which contact is made with external parties who may have an assignment for students. Expectation management is the key word. The following matters are important:

1. Be aware of the fact that most external clients know little of the structures that a school uses. This must be explained clearly and simply in the conversation. This could include matters such as: how is the program structured, how many students follow the course, what are they being trained for, etc.

2. Give the external client ample time to tell about his company/ institution and which assignment he has for the students. Ask if necessary clarifying questions and summarize regularly.

3. Together with the client, look for the concrete assignment that can be given to the students and verify for yourself whether this assignment fits in the curriculum, the level (and year) of the students and if they, the students and the school, can handle the organisational aspects of the assignment

4. Make clear agreements about:
   - the expertise of the students
   - the length of time that you work together
   - the number of hours that students are available for the client
   - how to deal with expenses incurred by students

5. Pay ample attention to everything that has to do with the supervision of students. Think of what is expected of the client and what the client and student can expect of the school.

6. Be open and honest about the fact that the student is a learning professional. That this can mean that mistakes will be made. Therefore, together with the client, make agreements about how to act at the moment that things run differently than agreed. For example: the student stays away without the client knowing why, or the end product is so disappointing that the client experiences nuisance. To whom can the client go to in case of such calamities?

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STEP 6 Collect Feedback

Feedback form

The collected feedback forms can be used for the next years' planning and budget.

Name:

Date:

Please tick the appropriate box

	good	sufficient	insufficient
Own functioning			
Contact with the clients			
Acquisition			
Maintaining the network			
Extending the network			
Coaching the students			
Entrepreneurial			
Independently			
Creative			
Flexible			
Problem solving			
Critical			
Conditions (time, support, materials)			
Projects/ assignments			
Number of assignments			
Level of the assignments			
The assignments matched the learning needs of the students			

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The assignments were sufficiently challenging			
The assignments encouraged collaboration			
The assignments encouraged entrepreneurial behaviour			
Support of the entrepreneur/ client			
Empathy of the entrepreneur/ client			
Collaboration in own organisation			
Collaboration in the team			
Collaboration with the executives			
Coaching by the executives			
Clarity in tasks and roles			
Composition of the team			
Division of tasks in the team			
Time and space for own development			
Time and space for team development			

Remarks*:

…… …… ……

…… …… ……

*personal learning needs, personal learning wishes; assistance needed for

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STEP 7 Evaluate and Act

There are two evolution forms below. The first would facilitate the team level evaluation. The second can be used by the manager assigned to regional learning and repositioning education in the region. Having the outcomes of the evaluations, the manager may be able to formulate an action plan if it is necessary.

A. Evaluation Form Regional Learning Team

With this evaluation form you can evaluate the project, the action points and the cooperation with other parties.

Date:

Filled in by:

Goals action plan

1. What were the goals of the past year?

Take the action plans and see which goals were set.

2. Were the formulated objectives testable?

0 Yes

0 No.

Explanation:

....

....

3. Which objectives have been achieved?

....

....

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4. What objectives have not been achieved and why not?

Think about:

☐ Composition of the project group

☐ Money

☐ Time

☐ Cooperation with other parties (district organ, inspection agencies)

☐ External factors (illness, reorganization, refurbishment, etc.)

....

....

Project management

5. Was the budget sufficient?

0 Yes

0 No.

Explanation:

....

....

6. Has a feasible timetable been made?

0 Yes

0 No.

Explanation:

....

....

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7. Has the time planning/ lead time been met?

0 Yes

0 No:

Explanation:

....

....

8. Have all the action points started on time?

0 Yes

0 No.

Explanation:

....

....

9. Were enough hours available?

0 Yes

0 No.

Explanation:

....

....

10. Was there sufficient preparation time for the action points?

0 Yes

0 No.

Explanation:

....

....

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11. Did the responsible (project manager) inform the parties involved sufficiently and in good time about the purpose, specific tasks, possible changes and progress?

0 Yes

0 Not always

0 No.

Explanation:

....

....

12. Was it clear who had which responsibility?

0 Yes

0 No.

Explanation:

....

....

Collaboration

13. How was the cooperation with / support of

a. Entrepreneurs

....

....

b. The Innovation Work Place Manager / program leaders / project leaders in the region

....

....

c. Other teachers

....

....

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14. What were success factors?

....

....

15. What were the bottlenecks?

....

....

16. Which improvement points will be worked up next year?

....

....

17. What are the goals for next year?

....

....

B. Evaluation Form Regional Learning Manager

With this form you can evaluate the process of repositioning your school/educational institute in the region. You can use the outcomes of the team level evaluation (see Evaluation Form Regional Learning Team in the above section).

Goals action plan

1. What were the goals of the past year?

2. Were the formulated objectives testable?

0 Yes

0 No.

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Explanation:

....

....

3. Which objectives have been achieved?

....

....

4. What objectives have not been achieved?

....

....

5. What is the reason that they were not achieved?

Think of:

☐ Composition of the team

☐ Skills of the team members

☐ Preparation of the team

☐ Preparation of the staff (information; time; expectation management)

☐ Attitude of the staff

☐ Money for capacity building (providing training)

☐ Time

☐ Time path

☐ Cooperation with other parties (district organ, inspection agencies)

☐ External factors (illness, reorganization, refurbishment, etc.)

Conclusions

....

....