



Validation Issues Induct a Basis
for Learning Evaluation

Guide for Regional Development Agencies



Education and Culture DG

Lifelong Learning Programme

VISIBLE Guide

Background



Welcome to the VISIBLE Guide

This VISIBLE Guide has been developed as part of an EU funded project designed to help project managers working in European Regional Development Agencies (RDAs) enhance their own skills and the skills of their team members. We start from an assumption that you how to manage a project; indeed many readers of this VISIBLE Guide may already hold project management qualifications and/or membership of project management associations and professional bodies.

This Guide then is more about the competencies (knowledge, skills and attitudes) that are needed to meet the standards and levels of performance (competences) needed by project managers and their teams. The competency matrix on page 6 explains the competencies in more detail and how they can be demonstrated at different levels. There is an assumption that many project managers will be operating mainly at level 4 and their project team developing through levels 1 to 3. In addition to these generic competencies each RDA may wish to make specific additions, which can be done on page 10.

Project managers may feel that there are significant differences in the way their projects are managed in comparison to other countries so we have attempted to position this thinking and explain the rationale behind our approach on page 3.

How do project managers and teams demonstrate their competencies?

The Guide is made up of three sections to help you demonstrate the level of competence at which you and your team are operating.

Section 1 contains the **PROCESSES** that explain how to work with competencies

Section 2 contains some **METHODS** to help project managers undertake various activities

Section 3 contains additional **INFORMATION AND TEMPLATES** to implement the activities

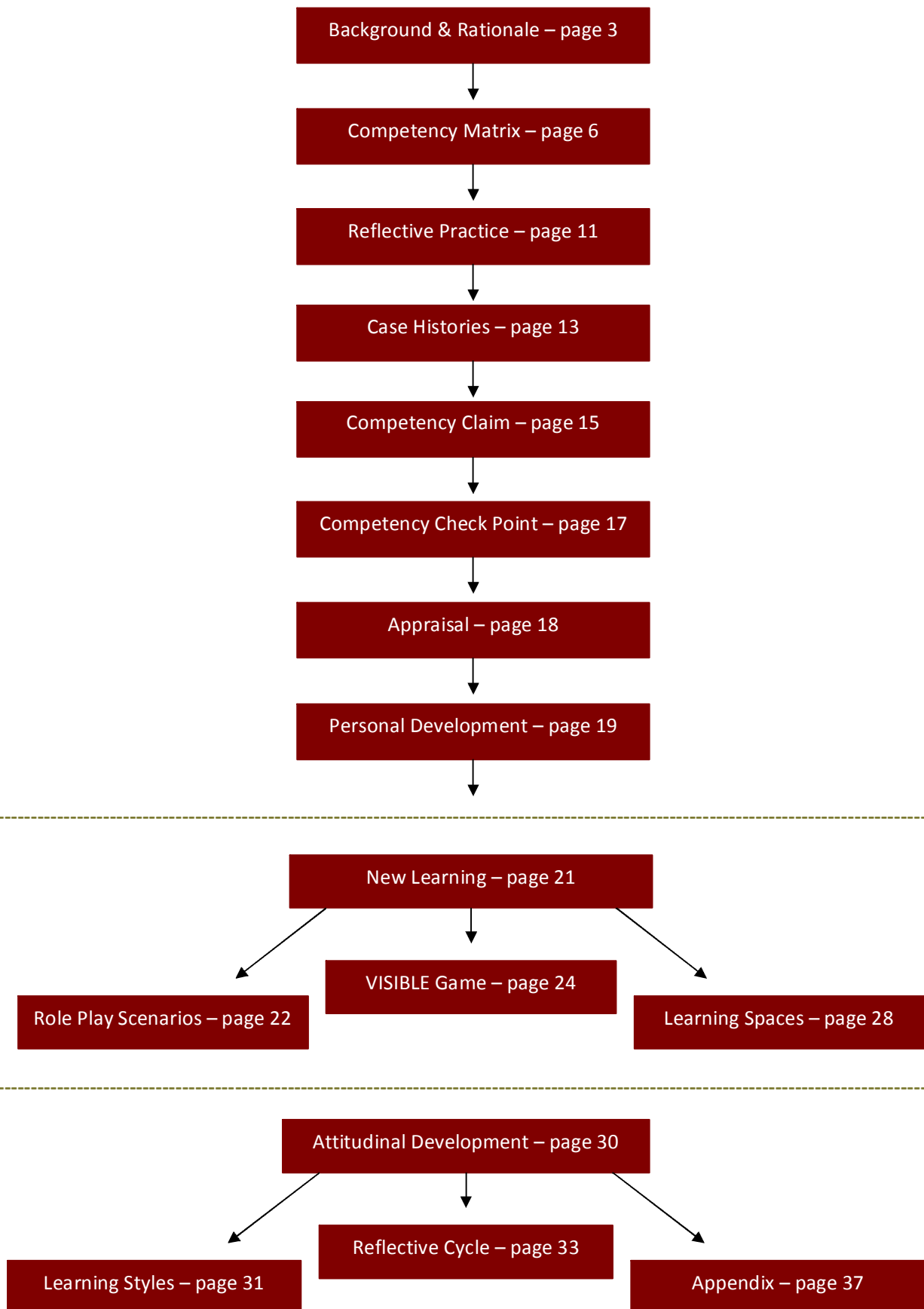
The flow chart on page 2 not only presents the contents but can also be used as a checklist through the stages of competency development. There are special notes pages within the Guide to write on so you can create a personal record of local interpretation and application. This approach means that the Guide is a truly interactive document that can be used again and again to help project managers and their teams provide high quality project management that meets targets on time and within budget.



This Guide is also available on CD-Rom, a copy of which can be found in the Appendix in Section 3

The VISIBLE Project Partners

VISIBLE Guide Contents



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VISIBLE Guide

Rationale behind our approach



Project differences

The concept of ‘project’ is a very important building block of the VISIBLE methodology. It is the basis of every learning tool contained in this Guide, including the Case Histories, Role Play Scenarios, Situational Knowledge Profiler™ and the VISIBLE Game.

As projects come in all shapes and sizes, we wanted to make sure that these differences are mainly random and do not follow any particular tendencies. If projects could be classified into certain categories – with a clear impact on applicable project management techniques and methodologies – it might have implications about the usability of the VISIBLE tools (e.g. the Competency Matrix, the VISIBLE Game etc..) and the definitions created (e.g. the levels of competencies).

One important distinction we examined was rooted in the structure of our partnership. Eight countries belonging to European Union (EU) and European Economic Area (EEA) are represented (IT/FR/BE/NO/HU/SK/RO/BG). Four of these: Dekut (Regional Development Agency, HU); Senec-Pezinok (Regional Development Agency, SK); Serda (Regional Development Agency, RO) and Barda (Regional Development Agency, BG) represent new member states (joining the EU in 2004 or later) from Eastern Europe. We looked at some important factors that may affect the similarity of projects along this distinction.

Rules of funding

According to the European Council ‘Major socio-economic disparities persist between different regions of the Union’. In order to implement the drive for economic and social cohesion, the European Commission has created financial instruments: The European Fund for Regional Development (EFRD), the European Social Fund (ESF) and the Cohesion Fund. The European Union promotes the development and structural adjustment of regions whose development is lagging behind, i.e. whose average per capita GDP is less than 75% of the EU average. They are called convergence regions. Incidentally all Eastern European regions represented by partners in the VISIBLE project are convergence regions, while none of the other represented regions is included in this category. Convergence regions can claim the bulk (more than 80%) of the money available. An even bigger impact related to funding is what kind of activities these regions are allowed to finance.

The priorities under the convergence objective are human and physical capital, innovation, knowledge society, environment and administrative efficiency, while for non-convergence regions (officially called Regional Competitiveness and Employment regions) the main themes are innovation, the promotion of entrepreneurship and environment protection. The main difference is the lack of available funding for human and physical capital in more developed regions.

A simple summary therefore might be that Eastern Europe is allowed to use the funds for building infrastructure while Western Europe is not. We could not find European statistics about how much of

the money is spent on hard or soft infrastructure but one example from Hungary shows that it is somewhere between 80% and 90% for EFRD and ESF funds. These facts clearly demonstrate that there must be significant differences in project structures.

There is another important difference related to funding rules (and it is not totally independent from the fact of whether a project is infrastructure or knowledge related). Projects in the Regional Competitiveness and Employment regions usually require the formation of partnerships (often involving more than five partners) while projects run by a single organisation abound in Convergence regions. It is easy to see that it can also heavily affect the project structure.

Cultural differences

Social scientists agree that the amount of social capital is significantly less in Eastern than in Western Europe. There is an ongoing debate about the origins of this difference. For our purposes it is fortunately irrelevant, we only need to be aware of its existence. Little social capital means that there is less trust among individuals, lower levels of cooperation, and consequently networks are weaker as well as smaller.

This further enhances the effect of the former factor (rules of funding) in creating more individual projects in Eastern Europe. Forming partnerships does not come naturally, and furthermore, even if partnerships are formed (often out of necessity) the level of trust among project partners is perceptibly lower, making cooperation more difficult.

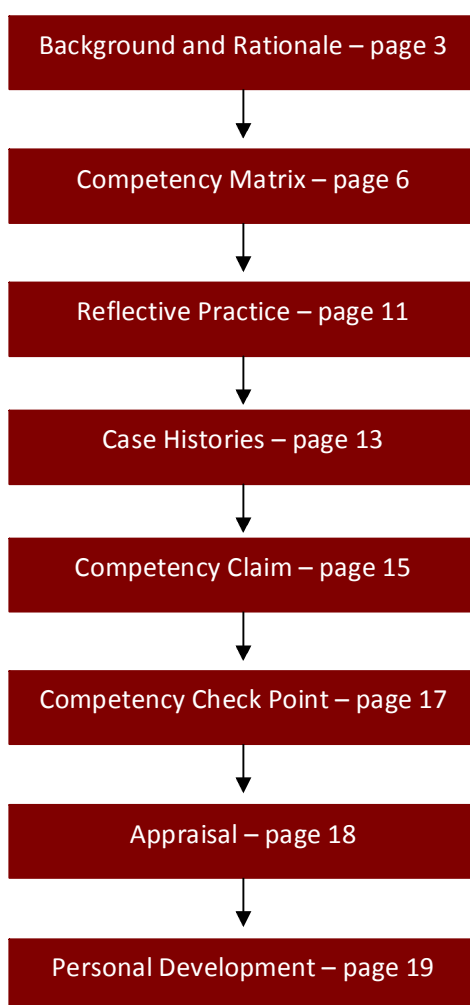
Conclusion

Having examined all of the Case Histories submitted by the Project Partners, giving special consideration towards the above mentioned differences, we have reached a consensus that it does not have a significant effect on how projects are handled.

Furthermore we could not find any indications that it would have any implications with regards to horizontal competencies and the related levels explained further in this Guide.

This conclusion we hope is of value to users as it further enhances our confidence in the usability and universality of the tools created during this project and presented in this Guide.

This is the section of the Guide that looks at the **PROCESSES** that project managers, across each of the European Regional Development Agencies (RDAs), will need to follow in order to develop their own competence and that of their team.



SECTION 1

VISIBLE Guide

Competency Matrix



Here is the **COMPETENCY MATRIX** and some instructions about how to use it. The matrix has been designed for project managers and their teams to support performance management processes however it can be used by anyone as a self-assessment tool. To get the most from it you need to reflect upon current performance. To quickly learn how to do this go to **REFLECTIVE PRACTICE** guidance on page 11 however, if you want to read about this in more depth, go to the article about the **REFLECTIVE CYCLE** on page 33.

Now that you know how to reflect, read through the seven competencies in the matrix and think about at which level you currently perform. You can record this on a **COMPETENCY CLAIM FORM** (page 15). Now think about the next level up from your current performance – what does this look like? Write it in a different colour and consider this to be your target and use as the basis of a discussion with your manager during **APPRAISAL** some guidance can be found on page 18.

You will see that each competency in the matrix is linked to different domains of learning: **cognitive** (knowledge), **psychomotor** (skills) and **affective** (attitude and behaviour). You can read more about these different domains and how important they are to **ATTITUDINAL DEVELOPMENT** on page 30. There is also a useful article in the appendix about different **LEARNING STYLES** (page 31).

Remember you can include additional competencies to further customise your matrix to best meet your local performance management framework needs. Some additional competencies might include e.g. risk management, quality assurance and excellence etc...

Competencies	Levels			
	1	2	3	4
1. Networking Be capable of forming and sustaining a selected or extensive group of contacts as means of initiating and developing relationships (both internal and external) <i>This competency is focused on the specific domains of learning shown below with a star ★</i> <i>cognitive (knowledge)</i> <i>psychomotor (skills) ★</i> <i>affective (attitude) ★</i>	Maintain relationships only on the basis of own operational necessities	Manage relationships only on the basis of the teams' operational necessities and create occasions to develop existing relationships	Contribute to the relationships only on the basis of the departments' operational necessities, create occasions to develop existing relationships, explore new areas and contacts to be developed	Develop current relationships only on the basis of organisational necessities, create occasions to develop existing relationships, explore new areas and contacts to be developed and provide useful information to the organisation head for their further development

Competencies	Levels			
	1	2	3	4
2. Results orientation Bring series of related actions to a successful conclusion to allow for new/increased potential; commit constantly in new challenging targets <i>This competency is focused on the specific domains of learning shown below with a star ★</i> <i>cognitive (knowledge)</i> <i>psychomotor (skills)</i> <i>affective (attitude) ★</i>	Accept fully responsibilities and actions within own role and acknowledge personal actions needed so as to lead to achievement of results	Review responsibilities and actions within own role and modify these for continuous improvement so as to lead to achievement of results	Recognise responsibilities and actions within own role and that of the team, modify these for continuous improvement so as to lead to achievement of results, determine and promote a results-orientated approach to meeting targets	Appraise responsibilities and actions within own role and that of the team, modify these for continuous improvement so as to lead to achievement of results, determine and promote a results-orientated approach to meeting targets, improve own performance up to results achievement

3. Organising Apply resources, to delegate, brief and energise proper action in the implementation of a plan/activity, optimising time management in relation to the original concept <i>This competency is focused on the specific domains of learning shown below with a star ★</i> <i>cognitive (knowledge) ★</i> <i>psychomotor (skills) ★</i> <i>affective (attitude)</i>	Define your own task with reference to its different dimensions and components	Interpret your own task with reference to its different dimensions and components and identify intervention priorities and available resources (own)	Determine your own task with reference to its different dimensions and components, identify intervention priorities and available resources (of others) and execute the task following priorities and not emergencies	Organise your own task with reference to its different dimensions and components, identify intervention priorities and available resources (own and/or of others), execute the task following priorities and not emergencies, utilising resources in the best way possible
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Competencies	Levels			
	1	2	3	4
4. Communication Organise and manage information, express efficiently and transmit concepts clearly and understand feedback, adapting the language (verbal and non-verbal) <i>This competency is focused on the specific domains of learning shown below with a star ★</i> <i>cognitive (knowledge)</i> <i>psychomotor (skills) ★</i> <i>affective (attitude) ★</i>	Efficiently maintain the main information and concepts that are needed to be transmitted taking into account specific needs and expectations of the receiver	Efficiently manage the main information and concepts that are needed to be transmitted to any target and effectively organise the distribution of information and concepts in written and oral form	Efficiently determine how to ensure that the main information and concepts that are needing to be transmitted to any target are effectively organised and distributed using written and oral forms and systematically apply a range of targeted and stylistic techniques to aid understanding	Efficiently develop different methods to ensure that information and concepts are transmitted in a timely way, effectively organising such distribution using written and oral forms, systematically applying a range of techniques to aid understanding and monitoring and evaluating the effect on actions, opinions and behaviours and the subsequent improvement in performance
5. Decision Making Making effective decisions, evaluating the objectives, risks, resources and instruments, with lucidity and promptness, even in conditions of uncertainty and complexity – evaluating the implications for one and others. <i>This competency is focused on the specific domains of learning shown below with a star ★</i> <i>cognitive (knowledge) ★</i> <i>psychomotor (skills) ★</i> <i>affective (attitude)</i>	Confirm the necessity and importance of effective decision making	Ensure the necessity and importance of effective decision making, collect and collate all the factors necessary to be able to carry out the decision process effectively	Provide the understanding of the necessity and importance of effective decision making to the team, collect and collate all the factors necessary to be able to carry out the decision process effectively, activate the most appropriate decision making mechanism within a simple scenario	Enhance the understanding of the necessity and importance of effective decision making to the team, collect and collate all the factors necessary to be able to carry out the decision process effectively, activate the most appropriate decision making mechanism within a range of complex scenarios

Competencies	Levels			
	1	2	3	4
6. Methodical Systematic, orderly in approach, structured approach in handling or managing a process <i>This competency is focused on the specific domains of learning shown below with a star ★</i> <i>cognitive (knowledge) ★</i> <i>psychomotor (skills) ★</i> <i>affective (attitude)</i>	Identify all of the elements that belong to a process, either simple or complicated	Examine the elements that belong to a process, either simple or complicated and determine the individual steps required for complete execution with particular attention to different methodologies and approaches	Evaluate the elements that belong to a process, either simple or complicated and determine the individual steps required for complete execution with particular attention to different methodologies and approaches and apply systematic steps and systems of control for individual and team work	Develop elements that belong to a process, determine the individual steps required for complete execution with particular attention to different methodologies and approaches, apply systematic steps and systems of control for individual and team work and produce a standardised approach that can be systematically adopted by any collaborator
7. Problem Solving To deal with problems, solving by adopting logical inductive processes (observation/hypothesis /trial) <i>This competency is focused on the specific domains of learning shown below with a star ★</i> <i>cognitive (knowledge) ★</i> <i>psychomotor (skills) ★</i> <i>affective (attitude)</i>	Classify and define a work-based problem	Organise and define a work-based problem and identify possible alternative solutions	Review the definition of the work-based problem, identifying possible alternative solutions then choose and execute the most appropriate solution	Assess the risk of the work-based problem, identifying possible alternative solutions, choose and execute the most appropriate solution and put in controls to measure and evaluate the outcome



USE THIS PAGE FOR YOUR NOTES ABOUT HOW YOU HAVE USED THE COMPETENCY MATRIX
LOCALLY AND USE TEMPLATE TO ADD COMPETENCIES THAT MATCH YOUR SITUATION

You can print this page and include as many additional competencies as you feel is necessary

Extra Competencies	Levels			
	1	2	3	4
Add your extra competency name here (e.g. RISK MANAGEMENT) Additional competency Write in each of the columns on the right the different levels of performance expected that relate to this new competency <i>This competency is focused on the specific domains of learning shown below with a cross X (mark as appropriate)</i> cognitive (knowledge) psychomotor (skills) affective (attitude)				

 In the Appendix in Section 3 is a:
COMPETENCY MATRIX (HANDOUT)

VISIBLE Guide

Reflective Practice



What is reflective practice?

REFLECTIVE PRACTICE has been described as having "a set of abilities and skills" to enable the individual to take a critical stance to problem solving or a state of mind. It is an approach used by learners in an educational sense when they analyse or evaluate one or more personal experiences and then generalise from the thinking. It is being used more and more in business to explore actions and behaviours in different work settings.



For the purpose of this Guide, **REFLECTIVE PRACTICE** is perhaps best understood as an approach which promotes autonomous learning that aims to develop the learners' understanding and critical thinking skills. Techniques such as self and peer assessment, problem-based learning, personal development planning and group work can all be used to support a reflective approach.

Individuals often use it as a form of learning through questioning and feedback as it forces us to question what it is that we know and how we come to know it. When we speak of 'reflective practitioners' we usually refer to adult learners who are engaged in some kind of activity (often professional) which they can use to reflect on their strengths, weaknesses and areas for development.

In this Guide, you will need **REFLECTIVE PRACTICE** skills so as to be able to continuously think about what you do in certain situations and how successful these have been or what went wrong.

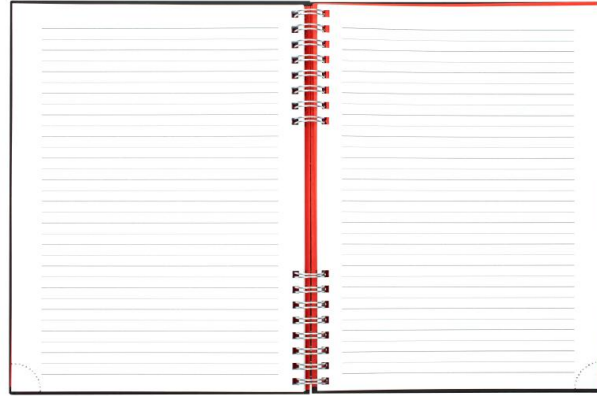
Exercise

Think about a recent training day, meeting or work situation and answer the following questions:

1. *Can you identify what you now know from the intervention?*
2. *What new skills have you been introduced to?*
3. *How do you feel about what you have just experienced?*
4. *What impact will it have on your behaviour?*

If you managed to answer these four questions quite easily – well done, you are well on your way to becoming a reflective practitioner.

Now practice your new reflection skills and write about situations in a **CASE HISTORY** format – there is an explanation of what this is and guidance as to how to do it on page 13.



USE THIS PAGE FOR YOUR NOTES ABOUT HOW YOU HAVE USED REFLECTIVE PRACTICE LOCALLY
AND OTHER ADDITIONAL INFORMATION TO HELP YOU USE IT AGAIN



In the Appendix in Section 3 is a:
REFLECTIVE PRACTICE EXERCISE SHEET (HANDOUT)

VISIBLE Guide

Case Histories



Case Histories

To help you to get better at **REFLECTIVE PRACTICE** and demonstrate your competence, we invite you to write up a few **CASE HISTORIES** based upon your past and current 'live' projects.

Successes, challenges and failures all offer opportunities for learning, and your learning will become more effective as you practice writing reflectively about each incident or situation.

The focus group that was part of the Project 'kick-off' meeting in Sofia in November 2007 concluded that:

"Case Histories are just stories with an educational message"

Following on from this meeting a wide variety of case histories were collected from the Regional Development Agencies involved in this project and you will find some examples of these in Appendix in section 3.

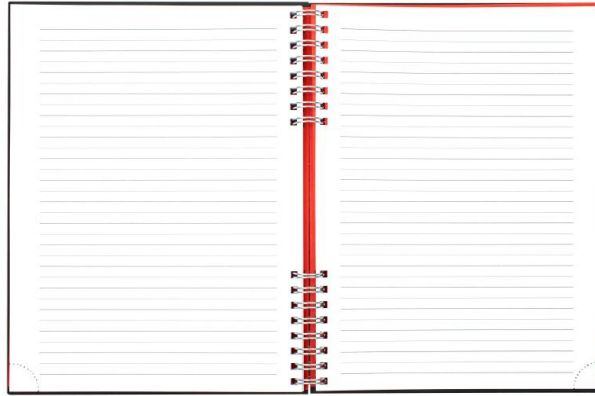
The format for the Case Histories was agreed during VISIBLE project meetings and has proved to be very useful to help project managers to consider what they have learned. Case Histories are a really good way of helping you to reflect upon your work, and to identify what you have learned from a situation. It may be that the case history is about a situation where all your project plans were successful and everything went according to your plan, in which case your Case History would record all the actions that you took that contributed to the success.

On the other hand it may be that the project experienced a number of difficulties and challenges. So your Case History might record each of the problems, and identify what had caused the problem, so that you can make sure that those things do not happen again.

Many Case Histories will be a mixture of challenges and success, so that you can show what you have learned and how you will take that learning forward to your next project.

This Guide gives you help and advice in how to create case histories to capture your own local situations and then turn these into learning opportunities using role-play scenarios – more information about how to do this is in the Appendix in section 3.





USE THIS PAGE FOR YOUR NOTES ABOUT HOW YOU HAVE USED THE CASE HISTORIES LOCALLY AND OTHER ADDITIONAL INFORMATION TO HELP YOU USE THEM AGAIN



In the Appendix in Section 3 are the following:

CASE HISTORY TEMPLATE (BLANK HANDOUT)

CASE HISTORY EXAMPLES (HANDOUT)

“USING JOURNAL WRITING TO ENHANCE REFLECTIVE PRACTICE” BY PROFESSOR DAVID BOUD (BACKGROUND READING)

VISIBLE Guide

Competency Claim

Shown below is an example of a **COMPETENCY CLAIM FORM**. This is to be used when requesting acknowledgement of your performance from your manager, benchmarked against the **COMPETENCY MATRIX**. It is suggested that you use this **COMPETENCY CLAIM FORM** during your appraisal and once completed keep it safe in a portfolio as part of your Continuing Professional Development (CPD).

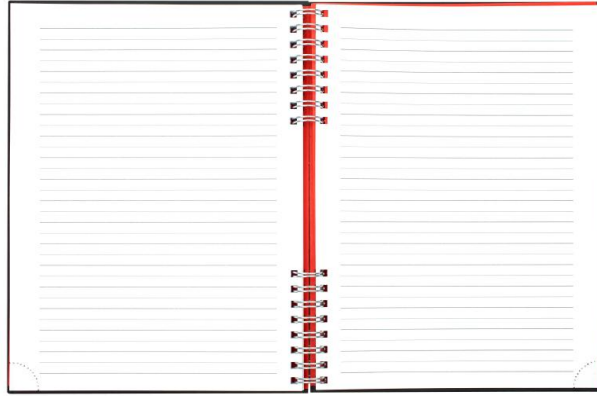
State a target level you are aiming for and the level you are claiming.

Write clearly here what evidence you have to claim this level of competence

Competency & level	Summary of evidence claimed
Write a summary of the evidence you are claiming against each competency	
An example of how evidence can be claimed for each competency is shown below	
Networking Target level = 4 Level claimed = 3 Development plan attached? yes ☒ no ☐	<i>My case history evidence explains how I have contributed to existing networking relationships through my involvement in local meetings. This has meant that I have to regularly chair these meetings for at least six people from within the organisation and this has meant that we work better together. I enjoy running these but am frustrated by the fact that not everyone always turns up.</i> <i>This meeting has been taking place now for the last six months and is progressing quite well, I know this because we have achieved a number of changes in our working practice, these include:</i> <i>Example written here</i> <i>Example written here</i> <i>I have not yet worked outside of my known contacts and this is an area that I need to do and my development plan is attached explaining how I need to do this better.</i> <i>I have learned from my reflection and SKP analysis that I need to work on <state specific areas> and this will help with my networking generally</i>

State whether your personal development plan is attached or not

Produce one **COMPETENCY CLAIM FORM** for each of the competencies that you wish to declare that you have achieved, number each piece of evidence and any **FORMS** and store them in a portfolio.



USE THIS PAGE FOR YOUR NOTES ABOUT HOW YOU HAVE USED THE COMPETENCY CLAIM FORM
LOCALLY AND OTHER ADDITIONAL INFORMATION TO HELP YOU USE IT AGAIN



In the Appendix in Section 3 is a:
COMPETENCY CLAIM FORM (BLANK HANDOUT)

VISIBLE Guide

Competency Check Point



It has been suggested that you keep your numbered evidence and **COMPETENCY CLAIM FORMS** in a portfolio and use this **COMPETENCY CHECK POINT** as an overview sheet to reminder of what you have achieved and where you still need to collect evidence.

COMPETENCY CHECK POINT

Competencies	Numbered Case History / Other evidence			
Levels	1	2	3	4
1. Networking				
2. Results orientation				
3. Organising				
4. Communication				
5. Decision Making				
6. Methodical				
7. Problem Solving				

The Competency Check Point can be used to:

- Map all claimed evidence against the seven validated competencies
- Provide a quick overview to what is being claimed against single or multiple competencies
- Cross reference evidence claims for easy assessment and validation

Please note that all evidence claimed must be:

- **Authentic** – show clear authorship / labelling attributed to the individual making the claim
- **Current** – relate to current activities taken place within the last 12 months
- **Sufficient** – provide enough to demonstrate that claimant really does meet the competency
- **Valid** – offer proof that the evidence is fit for its purpose and meets the competency level
- **Manageable** – achieve a balance between quality of evidence and quantity of evidence

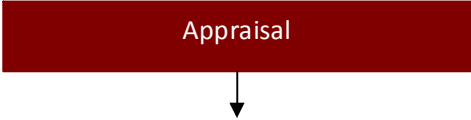


In the Appendix in Section 3 is a:

COMPETENCY CHECK POINT (BLANK HANDOUT)

VISIBLE Guide

Appraisal



Appraisal and its benefits

Performance appraisals are important for staff motivation, attitude and behaviour development, communicating and aligning individual and organisational aims, and fostering positive relationships between management and staff. It is important that employees have a clear understanding about what part of their performance is appraised and how it will be measured.

Performance can be measured according to previously established and mutually understood goals between the employee and the supervisor. These goals should be challenging but attainable and must be related to the core responsibilities. After the goals and objectives are established, criteria against which the employee's job performance can be evaluated are agreed upon. Criteria are the indicators of successful performance on the job. Good performance goals, objectives, and criteria are:

- job related
- challenging, but achievable
- clearly communicated and mutually understood
- specific and objective
- time-oriented
- written
- subject to revision, as needed

When appraisal is done well it has a huge impact upon attitude and behaviour which ultimately influences performance and quality standards.

Appraisals are much easier and more relaxed, if the manager meets each member of the team individually regularly for one-to-one discussion throughout the year.

Meaningful regular discussion about work, career, aims, progress, development, hopes and dreams, life, the TV, common interests, etc., whatever, makes appraisals so much easier because people then know and trust each other - which reduces all the stress and the uncertainty.

If you put off discussions or issue they eventually grow more and more of a problem, so...

- don't wait for the annual appraisal to sit down and talk
- The manager or the appraisee can get this started
- If you are an employee with a shy manager, then take the lead

VISIBLE Guide

Personal Development



Personal Development

All projects, large or small and staff cover for holidays etc. benefit from proper planning and management.

The most important project you will ever be involved in is your own life.

Your career is a major part of your life and it therefore follows that you should properly plan and manage this aspect.

There is always a large element of opportunism in career development - the right person at the right time finding the right job. Although unpredictable elements exist, planning and personal initiatives can play a major part in creating opportunities for development and advancement. You should try to shape your career rather than simply react to events.

Personal Development Plans

You need to produce a personal development plan (PDP) to record how your job role is changing, what you need to still learn, how you are going to learn it and then – what you are going to do with that learning.

The plan you establish will need to be flexible and change as your job requirements and aspirations change.

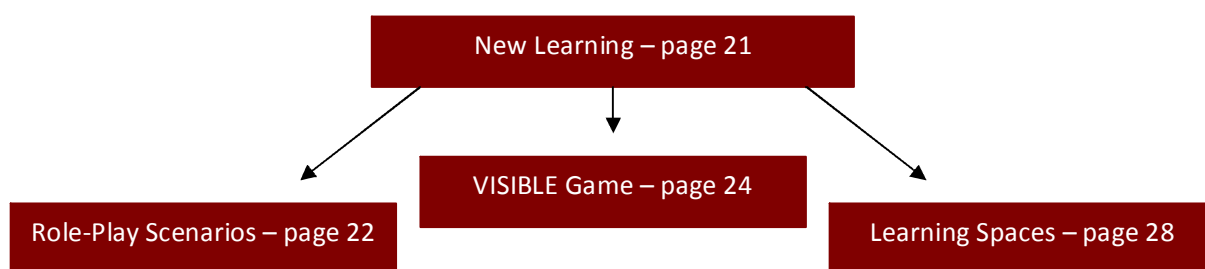
What to include in a personal development plan

Courses	Your objectives, what was learnt, how you will use the information
Mentoring	Dates, outcomes, key learning for you, how you will use the learning
Coaching	Dates, outcomes, key learning for you, how you will use the learning
Coaching - Informal	Outcomes of informal coaching with peers and other colleagues
Reading	What was learnt, how you will use the information
Research	Your objectives, what was learnt, how you will use the information
Training	The course objectives, what you learnt, what you will do differently next time.
Experiences	Real experiences from which you gained significant incite, Mistakes - yours or others. Record what happened, what you learnt, how you will have applied this.



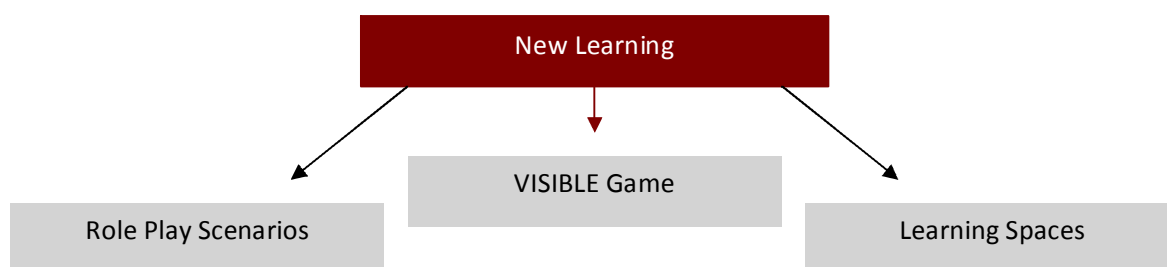
Validation IssueS Induct a Basis
for Learning Evaluation

This is the section of the Guide that looks at the **METHODS** available to help Project Managers undertake various activities to develop their competence and that of their teams.



SECTION 2

VISIBLE Guide



New Learning

Having got this far, you (and your team) should now be clear about your current performance against the **COMPETENCY MATRIX**

You should have set yourself (and your team) a target level for improvement and marked this on your **COMPETENCY CLAIM FORM** so that this is ready for completion as you collect your evidence of performance. You will also have set up portfolios to collect and collate your evidence and printed off a **COMPETENCY CHECK POINT FORM** to record each item as it is put in the portfolio.

You will have agreed these targets with your manager during **APPRAISAL** – and put in place a process and timescale to complete a **PERSONAL DEVELOPMENT PLAN** for you and your team.

Now you are ready to take the next step and undertake some **NEW LEARNING!**

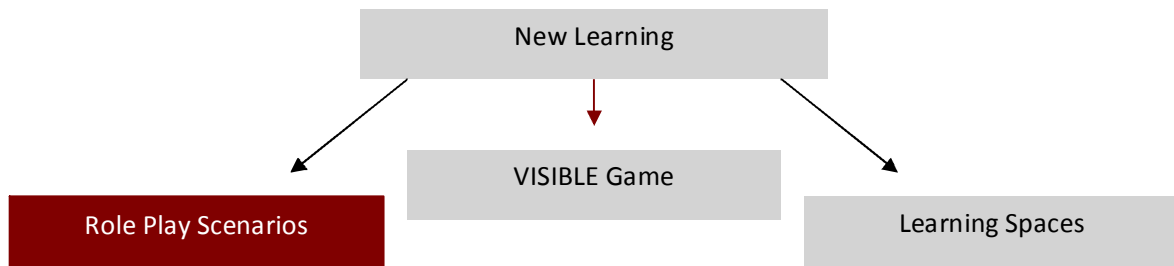
This section of the Guide introduces you to three methods – each of which will help you to enhance your competence through the development of new knowledge, new skills and changed attitudes and behaviours.

What are the new learning methods?

- **ROLE PLAY SCENARIOS** – developed locally using information from real situations
- **VISIBLE GAME** – with specially designed game cards
- **NON-FORMAL LEARNING** approaches

You can, of course, continue to develop your knowledge, skills and attitudes through the experience of undertaking more projects over time. However, you can also gain faster learning by practising situations before they arise using these three methods.

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Role-Play Scenarios have been created to best describe the kind of situations that are regularly faced by Project Managers. These can be used in three different ways: you can act out the 'prepared' scenarios; write and then act out your own scenarios (created from your own case histories) or simply use the scenarios to facilitate a group discussion.



Example #1

Role-play the 'prepared' scenarios either do this as a team or use 'actors' and invite observers to comment and recommend successful endings

Ground rules for running role-plays and observer/participant feedback sheets in the Appendix in Section 3

Example #2

Write your own role-play scenario and then act it out by first reflecting upon a situation that has happened at work and writing a case history. Then use the case history to write your own role-play scenario with three different endings depending on the actions that are taken

Case history templates are provided in the Appendix in Section 3)

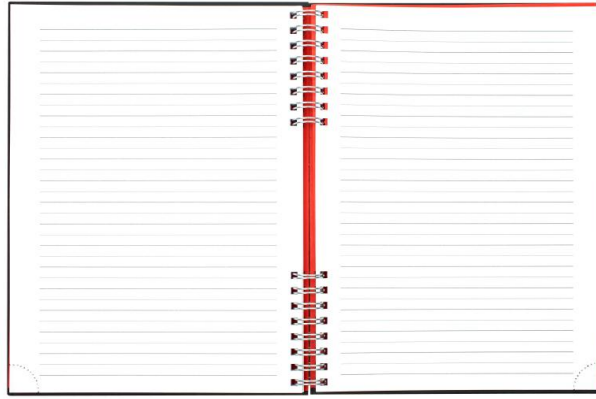
(Guidance on how to write case histories and turn them into role-play scenarios is provided in the Appendix in Section 3)

Example #3

Facilitate a group discussion about the role-play scenarios this can be done in a small or large group using the questions below to help the discussion

1. What is happening?
2. Who is involved?
3. What are the different people doing?
4. What should they be doing - they might be doing the right thing already?
5. What will happen if nothing is done - will the situation get worse or better?
6. What are your other options?
7. What are the likely outcomes?
8. What are the key learning points for the Project Manager?

Tips on how to facilitate discussions are provided in the Appendix in Section 3



USE THIS PAGE FOR YOUR NOTES ABOUT HOW YOU HAVE USED THE THREE ROLE-PLAY SUGGESTIONS LOCALLY AND OTHER ADDITIONAL INFORMATION TO HELP YOU USE THEM AGAIN



In the Appendix in Section 3 are:

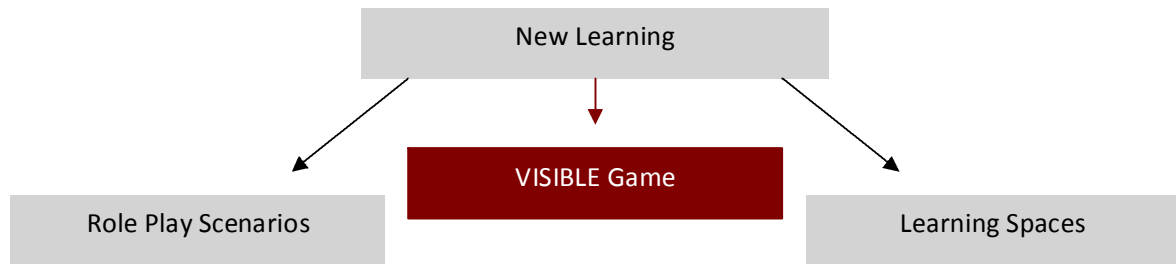
GROUND RULES FOR RUNNING ROLE-PLAYS (HANDOUT)

PREPARED ROLE-PLAY SCENARIOS X 3 (HANDOUT)

OBSERVERS / PARTICIPANT FEEDBACK SHEET (HANDOUT)

HOW TO WRITE CASE HISTORIES AND THEN TURN THEM INTO ROLE-PLAY SCENARIOS (HANDOUT)

VISIBLE Guide



VISIBLE Game

Congratulations for getting this far – you are really learning now! You and your team should be clear about current performance against the **COMPETENCY MATRIX** and have practised different ways to approach situations using the **ROLE PLAY** and **CASE HISTORIES** - now we have another way to help you learn how to improve project management performance – the VISIBLE Game.

The VISIBLE Game builds on the VISIBLE competency matrix with the same 7 competencies. Each competency is divided into four levels. The basis for the game cards are the Case Histories provided in this Guide. Most of these are developed from those collected by the RDAs involved in the VISIBLE project.



The purpose of the game is to help project managers and others working with projects to reflect on issues and competencies related to everyday project management. The focus on the seven competencies and the cross-cutting “wild cards” helps the players reflect on the nature of each competency and on the ability of the players to select appropriate solutions for the cases they encounter. Some of the issues on the cards are difficult and need answers that correspond to the high level of complexity involved. Other issues are very straight forward and ask for simple answers. Players will be rewarded for answers that correspond to the level of difficulty involved in the issue. A complex answer for a simple question is not rewarded.

The answers of the game do not pretend to be 100% true. There may be different "best answers" depending on the actual situation project managers and project members experience. If a participant selects an answer that does not give 8 points, which is the top score, this is to be seen as an opportunity for reflection and discussion on *why* we choose to do as we do. These discussions and reflections will help the players to prepare for real life situations.

The game *process* is the most important aspect of the game. It invites dialogue amongst players on the cases and on the different answers. The promotion of such collective reflection is one of the main purposes of the game. This game is, in other words, a good tool for learning in relation to projects. It

may indicate or even show the competencies of a person, but it cannot be seen as *proof* of what this person is capable of achieving. It is in other words not a tool for HR managers to decide who they want to be working in a project and who they do not want in a project team.

Board and pieces

The game board is divided into 8 fields corresponding to the 7 competencies and the cross-cutting "Wild Cards". The game comes with 6 pieces that represent the players. When the game starts the players choose one piece each and place it on one of the eight fields. Only one piece will be placed on each field. The players take turns rolling the dice and move the number of fields indicated on the dice.

Game Cards

The game cards come in 8 categories and have four levels. On the front page of each card there is a short text presenting a situation, as well as 5 different possible courses of action that the player can choose from. On the reverse side of the card the player will find the score for each of the answers on the front page together with a rationale for the score.

In the top right corner of the card there is a number referring to the number of the case story that is the basis for the card. In the bottom right corner of the reverse side there is a number from 1 to 4 that signifies the level of the case referring to the levels of the competency matrix.

How to play the game

The game can be played by up to 6 players. A player can be either an individual or a group of any size. The game cards are well mixed so that cards of different levels will be randomly spread. All the cards of one competency, for example "Networking", are placed with the front side up on the field corresponding to the cards competency.

The players decide how many rounds to play or for how long they want to play.

The players now take turns:

Rolling the dice

Moving the pieces according to the number on the dice

Picking the first card of the deck on the field where their piece ends after rolling the dice

Reading aloud what is on the front page of the card so everyone can hear what the case is about, and what the possible answers are.



NO, it is not allowed to look at the reverse side of the card before answering!

The player who rolled the dice then decides which answer to select (see version 1 and 2 below). Write the points on the scoring sheet. Then read the explanation on the reverse side of the card for the other participants.

All the participants then discuss the answer chosen by the player. *Is the answer rated highest on the card really the best answer? Are there situations where another answer might have been better?* Here the players can refer to the definition of the competencies in the VISBLE guide and compare with the level listed in the bottom right corner of the card's reverse side.

The game now continues with the next player.

Version 1

In version 1 of the game the players (individuals or a group) reflect and discuss together and then decide on what answer they want to choose.

Version 2

In version 2 of the game the player rolling the dice asks for comments and advice from the other players before that player alone decides what answer to select.

Scoring

The best answer is considered to be the one where the player selects an answer that corresponds to the level of the case. The best a player can get is 8 points. If the player has a case that is considered to be at level 3, then the level 3 answer gives 8 points. If the player instead answers with a level 4 or a level 2 answer he or she gets 4 points. A level 1 answer will in this case give 2 points. On all cards there is an answer that is inappropriate or does not fit at all. If this answer is selected the player will get 0 points.

The players may disagree with the scoring even though much effort has been put into making it as precise as possible. The important thing is the reflection of the players on what the competencies mean, what the appropriate action is in different situations, and how this can translate into better action in real life situations.

Have fun playing!



Here are just some of our willing participants from across the project testing out the game

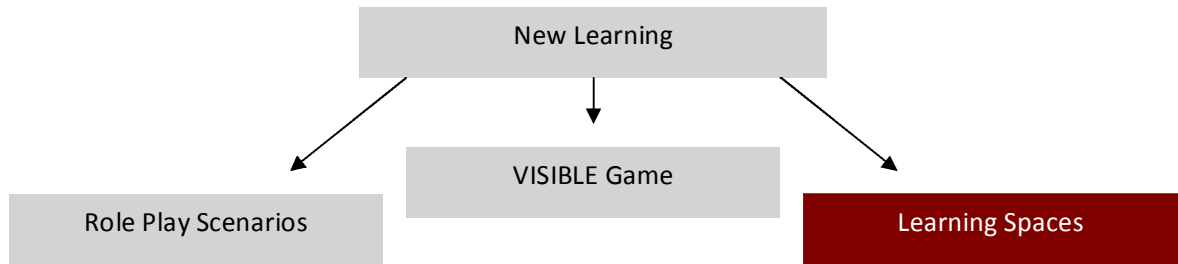


**USE THIS PAGE FOR YOUR NOTES ABOUT HOW YOU HAVE USED THE VISIBLE GAME LOCALLY AND
OTHER ADDITIONAL INFORMATION TO HELP YOU USE IT AGAIN**



A separate box with the VISIBLE Game, instructions and playing pieces is available from
your Regional Development Agency

VISIBLE Guide



Learning Spaces

Creating a space to learn is important to help the process and make it easier for all involved.

A few key points are worth considering here.

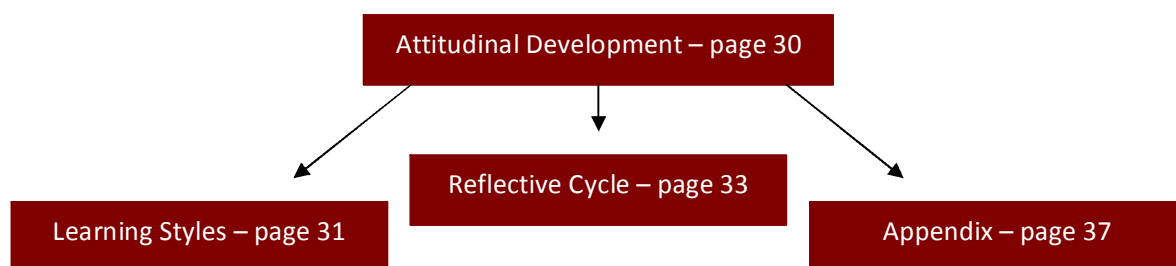
- **Classrooms are not the only form of learning space.** While the classroom is assumed to be a primary location of learning, data suggest that a majority of learning activity takes place outside the classroom
- **Social interaction is a growing part of learning.** Evaluation methods and performance metrics emphasize individual effort and achievement, but learners increasingly are motivated by social interaction with their peers. Pedagogy is shifting to emphasize team activities and collaborative learning.
- **Technology is natural.** Computer and networking technologies that once might have appeared exotic (pervasive wireless networking, iPods, smart phones) or transformative are now considered mainstream and many see them as a natural component of their lives.
- **Learning can occur out of sequence.** Although lectures, books, articles, and other traditional tools present information in a deliberate, sequential manner, today's learners are comfortable with overlapping discussion threads and parallel activities that may span different types of media, devices, and communities.
- **Learners construct content rather than just consuming it.** Learners are active authors of content, including video documents, online blogs, and other forms of digital expression. Whether delivering a final report or going online to converse with members of an online community, today's learners have a range of digital devices and software tools that allow them to create and shape content.

You may work in a very small organisation, where a lot of informal learning takes place. In this situation, reflective writing up of case histories is an important learning tool.

You may work in a very large organisation, where formal learning takes place in a classroom; in this case it is really important to transfer that learning back to your own workplace and situation.

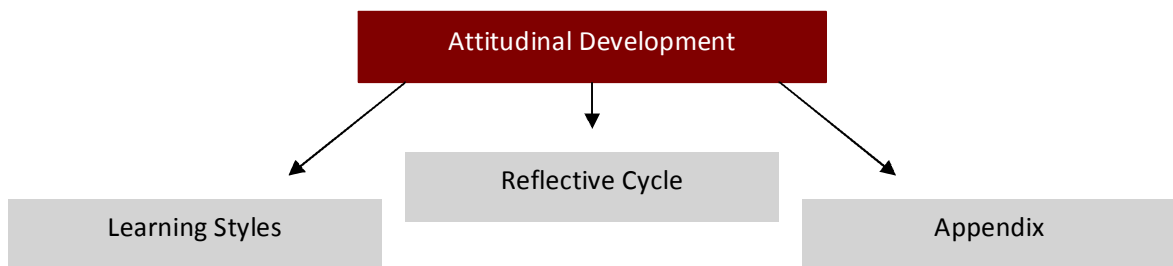
You may find that your colleagues work over a large geographical area and you rarely see them face-to-face. In this situation make the most of technology and social and business networking media to share knowledge and learn from each other.

This is the section of the Guide that provides **ADDITIONAL INFORMATION AND TEMPLATES** needed by Project Managers to effectively implement the approaches outlined in this Guide.



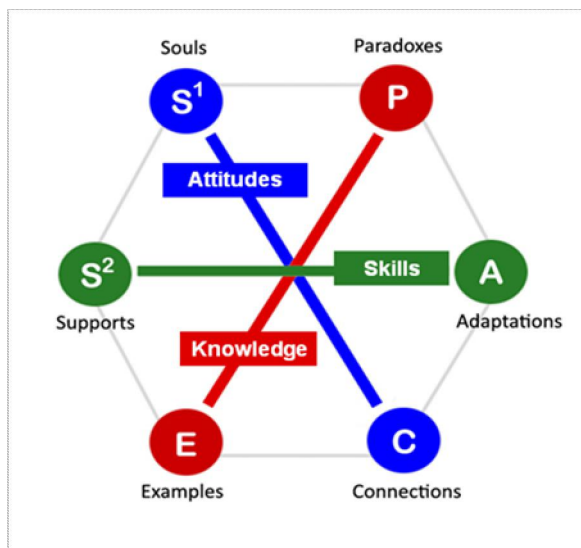
SECTION 3

VISIBLE Guide



Attitudinal Development (Situational Knowledge Profiler™)

Setting standards and competencies to improve the quality of performance is not enough if people are not motivated to do a good job. Motivation comes from someone's attitude to their work and the way they use their knowledge and skills.



A team can have the **knowledge** and the **skills** they need in their role but they also need motivation and the right **attitude** to use these effectively.

During periods of change individuals often feel demotivated. Their attitude to work can change and this in turn can affect their performance.

In this Guide is a unique cognitive mapping tool (Appendix section 3) that measures how you (and your team) use knowledge, skills and attitude when working on projects. The tool was developed outside of the VISIBLE project by a UK-based company OFQT Ltd., www.ofqt.com and has been tested across Europe and validated over a four-year period. It is included in this VISIBLE Guide as an additional learning tool.

Follow these simple steps to receive a personal analysis report that reveals to you and your team the priorities that will affect attitudinal development and improve project management performance.

*This is FREE only to users of this VISIBLE Guide.

1. Using a black pen, complete the paper questionnaire (available in the Appendix in section 3) and send it by post to: OFQT Ltd, c/o A. Wilson, Simpson Wreford & Co., Wellesley House, Duke of Wellington Avenue, Royal Arsenal, London UK. SE18 6SS. Please make sure that you also send a large self-addressed envelope so you can receive your report.

Or

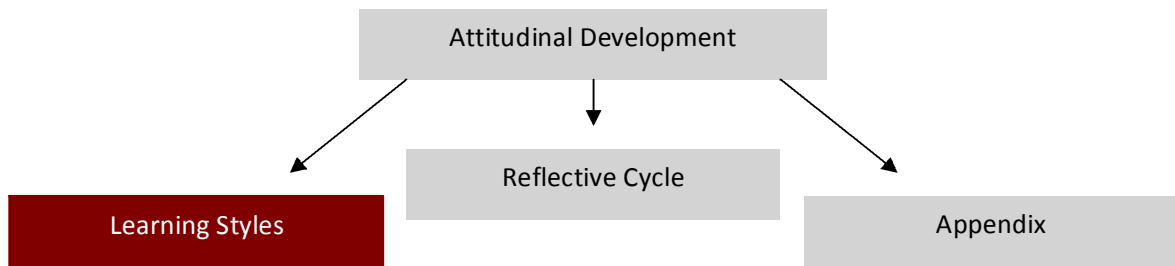
2. Type your responses into the electronic version (Word) on the CD-ROM (available from your Regional Development Agency). Save a completed copy to your computer then email this to skp@ofqt.com - a report will then be sent to you by email.



In the Appendix in Section 3 is the:

ATTITUDINAL DEVELOPMENT QUESTIONNAIRE (Situational Knowledge Profiler™)

VISIBLE Guide



Learning Styles (Background reading)

A learning style is a student's consistent way of responding to and using stimuli in the context of learning. Keefe (1979) defines learning styles as the *"composite of characteristic cognitive, affective, and physiological factors that serve as relatively stable indicators of how a learner perceives, interacts with, and responds to the learning environment."* Stewart and Felicetti (1992) define learning styles as those *"educational conditions under which a student is most likely to learn."* Thus, learning styles are not really concerned with "what" learners learn, but rather "how" they prefer to learn.

Learning styles are points along a scale that help us to discover the different forms of mental representations; however, they are not good characterizations of what people are or are not like. We should not divide the population into a set of categories (i.e., visual and auditory learners). What these various instruments attempt to do is to allocate a person on some point on a continuum (similar to measuring height or weight). In other words, do not pigeonhole people as we are all capable of learning under almost any style, no matter what our preference is.

The literature basically indicates that there is wide acceptance of the concept of learning styles; however, there is disagreement on how to best measure learning styles (Coffield, et. al., 2004). While the learning profession has long recognised the need for innovative instructional activities that relate to the diverse learning styles of learners, there is some question as to just how meaningful they are to the learning environment. That is, most researchers agree that we do have various learning styles and preferences, however, the research tends to agree that it is relative unimportant as it is far more important to match the presentation with the nature of the subject, such as providing correct learning methods, strategies, and context; than matching individual preferences (Coffield, 2004). For example, in a large meta-study, Marzano (1998) found that graphic and tactile representations of the subject matter had noticeable effects on learning outcomes, regardless of any attempt to match them with learners' modalities.

Perhaps David Merrill (2000) has the best philosophy for using learning styles -- instructional strategies should first be determined on the basis of the type of content to be taught or the goals of the instruction (the content-by-strategy interactions) and secondarily, learner styles and preferences are then used to adjust or fine-tune these fundamental learning strategies. Finally, content-by-strategy interactions take precedence over learning-style-by-strategy interactions regardless of the instructional style or philosophy of the instructional situation.

Merrill continued with the argument that most students are unaware of their learning styles and if left to their own means, they are UNLIKELY to start learning in new ways. Thus, knowledge of one's learning styles can be used to increase self-awareness about their strengths and weaknesses as learners. In other words, all the advantages claimed for meta-cognition (being aware of one's own thought and learning processes) can be gained by encouraging learners to become knowledgeable about their own learning and that of others (Coffield, 2004).

There is no good understanding of learning styles as it stands. But it certainly does not follow that we all learn the same way - the senses may well work in concert, but (as someone with thick glasses, I can attest) some senses work more or less well, meaning that each individual may combine the senses differently.

It seems at this point in time that learning styles are not really "styles," but rather "preferences" in that we do NOT learn best by using our style of learning. That is, we prefer one or more styles over others.

References

Coffield, F., Moseley, D., Hall, E., & Ecclestone, K. (2004). Learning styles and pedagogy in post-16 learning: A systematic and critical review. www.LSRC.ac.uk: Learning and Skills Research Centre. Retrieved January 15, 2008: <http://www.lsda.org.uk/files/PDF/1543.pdf>

Keefe, J. W. (1979) Learning style: An overview. In NASSP's Student learning styles: Diagnosing and proscribing programs (pp. 1-17). Reston, VA. National Association of Secondary School Principles

Marzano, R. J. (1998). A theory-based meta-analysis of research on instruction. Mid-continent Regional Educational Laboratory, Aurora, CO.

Merrill, D. (2000). Instructional Strategies and Learning Styles: Which takes Precedence? In Robert Reiser and Jack Dempsey (Eds.) Trends and Issues in Instructional Technology. Prentice Hall.

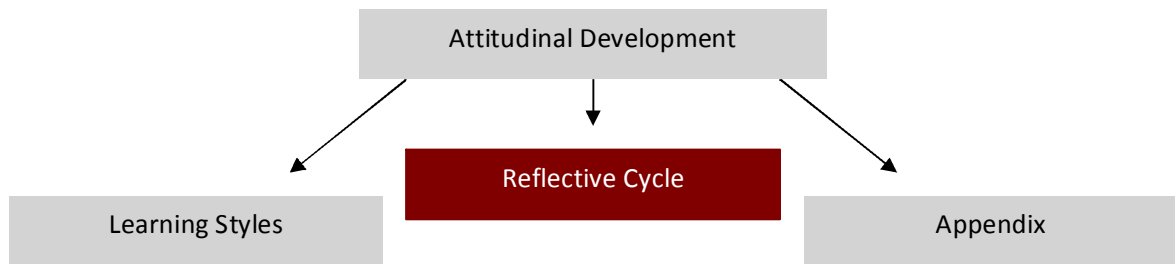
Hayman-Abello S.E. & Warriner E.M. (2002). Child clinical/pediatric neuropsychology: some recent advances. Annual Review of Psychology, 53, 309-339.

Stewart, K. L., & Felicetti, L. A. (1992). Learning styles of marketing majors. Educational Research Quarterly, 15(2)

Learning point

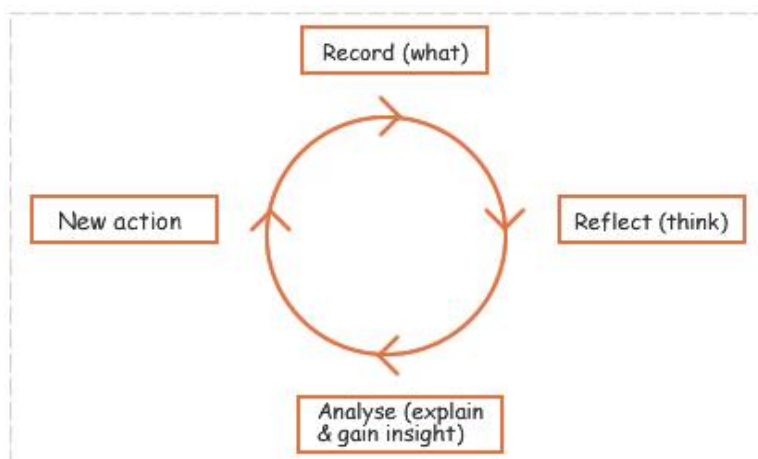
When designing learning for the people you are working with try, if you can, to customize the design for specific people, use varied styles of delivery to help everyone learn. This article and the one that follows on **Reflective Cycle** can be used to help others to understand how they learn and also so they can appreciate that some of your delivery will for others more than them (and vice versa).

VISIBLE Guide



Reflective Cycle (Background reading)

The aim of reflection is to develop an action cycle where reflection leads to improvement and / or insight.



Recording involves writing about what happened, when it happened and who was involved in order to understand the context.

Useful questions for recording

What happened?
Who was involved?
What was their involvement?
When did it happen?

Reflection involves thinking about and interpreting the experience. Reflecting involves thinking about the values, beliefs and assumptions you are writing about. The reflection aims to show the development of your ideas over time.

Useful questions for reflection

- Why did this happen in this way?
- How could it be improved? How could I improve the way I did things?
- How could the situation be improved?
- What effects would these improvements have?
- What values, beliefs, assumptions would explain this behaviour / incident / occurrence etc.

Analysis in a reflective journal may involve three things:

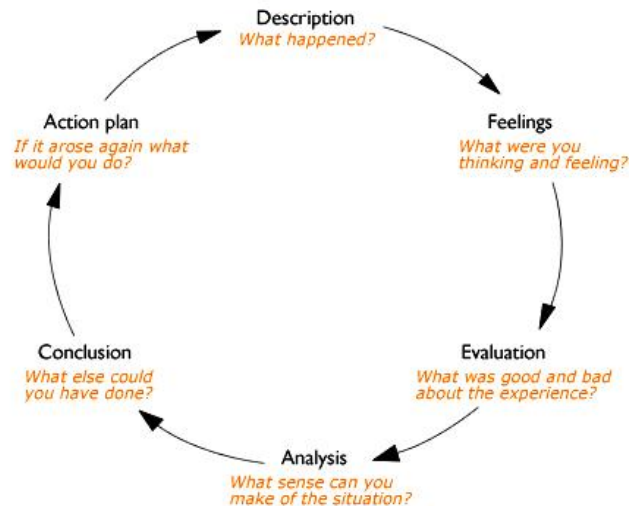
1. Analysis of experience or content
2. Integration of experience with theory
3. Demonstration of improved awareness and self development

Useful questions for analysis

- What are the advantages / strengths / disadvantages / weaknesses?
- How could the weaknesses / disadvantages be improved?
- What are the similarities & differences between this and theory?
- How could this experience / theory contribute to improving this?

The reflective cycle (Gibbs 1988)

David Kolb has defined one of the most commonly used models of learning. As in the diagram below, it is based on two preference dimensions, giving four different styles of learning.



Preference Dimensions

Perception Dimension

In the vertical Perception Dimension, people will have a preference along the continuum between:

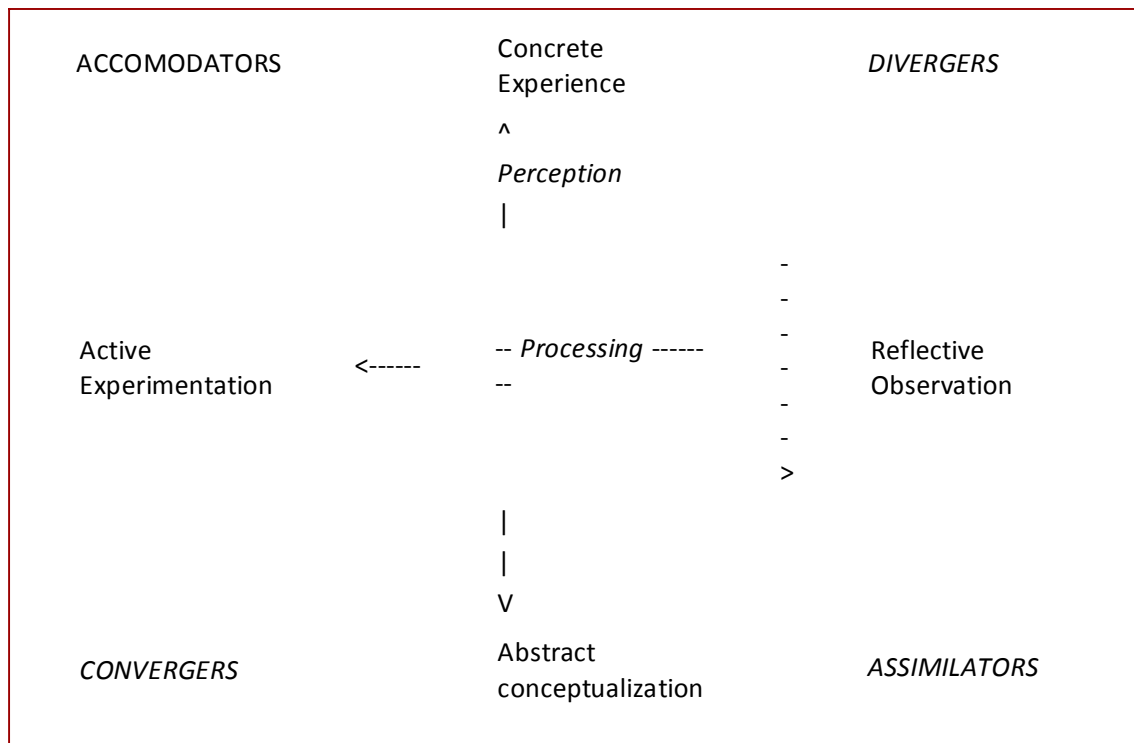
- *Concrete experience*: Looking at things as they are, without any change, in raw detail.
- *Abstract conceptualization*: Looking at things as concepts and ideas, after a degree of processing that turns the raw detail into an internal model.

People who prefer concrete experience will argue that thinking about something changes it, and that direct empirical data is essential. Those who prefer abstraction will argue that meaning is created only after internal processing and that idealism is a more real approach. This spectrum is very similar to the Jungian scale of Sensing vs. Intuiting.

Processing Dimension

In the horizontal Processing Dimension, people will take the results of their Perception and process it in preferred ways along the continuum between:

- *Active experimentation*: Taking what they have concluded and trying it out to prove that it works.
- *Reflective observation*: Taking what they have concluded and watching to see if it works.



The experimenter, like the concrete experience, takes a hands-on route to see if their ideas will work, whilst the reflective observers prefer to watch and think to work things out.

Reflective Cycle and its affect on learning styles

Divergers (Concrete experienter/Reflective observer)

Divergers take experiences and think deeply about them, thus diverging from a single experience to multiple possibilities in terms of what this might mean. They like to ask 'why', and will start from detail to constructively work up to the big picture. They enjoy participating and working with others but they like a calm ship and fret over conflicts. They are generally influenced by other people and like to receive constructive feedback. They like to learn via logical instruction or hands-one exploration with conversations that lead to discovery.

Convergers (Abstract conceptualization/Active experimenter)

Convergers think about things and then try out their ideas to see if they work in practice. They like to ask 'how' about a situation, understanding how things work in practice. They like facts and will seek to make things efficient by making small and careful changes. They prefer to work by themselves, thinking carefully and acting independently. They learn through interaction and computer-based learning is more effective with them than other methods.

Accommodators (Concrete experientier/Active experimenter)

Accommodators have the most hands-on approach, with a strong preference for doing rather than thinking. They like to ask 'what if?' and 'why not?' to support their action-first approach. They do not like routine and will take creative risks to see what happens. They like to explore complexity by direct interaction and learn better by themselves than with other people. As might be expected, they like hands-on and practical learning rather than lectures.

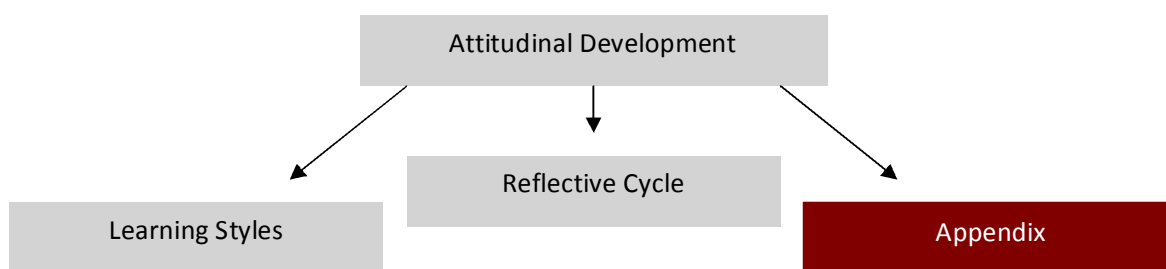
Assimilators (Abstract conceptualizer/Reflective observer)

Assimilators have the most cognitive approach, preferring to think than to act. They ask 'What is there I can know?' and like organized and structured understanding.

They prefer lectures for learning, with demonstrations where possible, and will respect the knowledge of experts. They will also learn through conversation that takes a logical and thoughtful approach. They often have a strong control need and prefer the clean and simple predictability of internal models to external messiness. The best way to teach an assimilator is with lectures that start from high-level concepts and work down to the detail. Give them reading material, especially academic stuff and they'll gobble it down. Do not teach through play with them as they like to stay serious.

See also: Kolb, D.A. (1984). *Experiential Learning*. Englewood Cliffs, NJ: Prentice-Hall

VISIBLE Guide



This section contains the **ADDITIONAL INFORMATION AND TEMPLATES** relating to each of the Sections in the Guide. They support the competency process and are also available on the CD-ROM.

FROM SECTION 1

REFLECTIVE PRACTICE EXERCISE SHEET (HANDOUT) – page 38

CASE HISTORY TEMPLATE (BLANK HANDOUT) – page 39

CASE HISTORY EXAMPLES (HANDOUT) – page 42

“USING JOURNAL WRITING TO ENHANCE REFLECTIVE PRACTICE” BY PROFESSOR DAVID BOUD
(BACKGROUND READING) – page 65

COMPETENCY CLAIM FORM (BLANK HANDOUT) – page 73

COMPETENCY CHECK POINT (BLANK HANDOUT) – page 77

FROM SECTION 2

GROUND RULES FOR RUNNING ROLE-PLAYS (HANDOUT) – page 78

PREPARED ROLE-PLAY SCENARIOS (HANDOUT) – page 79

OBSERVERS / PARTICIPANT FEEDBACK SHEET (HANDOUT) – page 82

HOW TO WRITE CASE HISTORIES AND THEN TURN THEM INTO ROLE-PLAY SCENARIOS (HANDOUT) – page 83

TIPS ON HOW TO FACILITATE DISCUSSIONS (HANDOUT) – page 84

VISIBLE BOARD GAME, CARDS, DICE, PLAYERS PIECES (SEPARATE BOX)

FROM SECTION 3

SITUATIONAL KNOWLEDGE PROFILER™ – page 85

ON CD-ROM

POWERPOINT SLIDES FROM NATIONAL THEATRE-BASED WORKSHOPS (PRESENTATION MATERIAL)

COMPLETE VISIBLE GUIDE

REFLECTIVE PRACTICE EXERCISE SHEET

REFLECTIVE PRACTICE is an approach which promotes autonomous learning that aims to develop the learners' understanding and critical thinking skills.

Individuals often use it as a form of learning through questioning and feedback as it forces us to question what it is that we know and how we come to know it.

When we speak of 'reflective practitioners' we usually refer to adult learners who are engaged in some kind of activity (often professional) which they can use to reflect on their strengths, weaknesses and areas for development.



So that you can practice this valuable skill, use the questions below to prompt your thinking. Write your answers on a blank sheet of paper **and put your name and date at the top.**

Do the initial thinking by yourself to begin with and then find a partner to discuss your findings.

This exercise should take no more than 20 minutes to reflect, then 10 minutes discussion each person in pairs. If there is a facilitator s/he should then ask each pair to highlight ONE thing that was most powerful from this learning and share it with the group.

Exercise: Think about a recent training day, meeting or work situation and answer the following questions:

- 1. Can you identify what you now know from the intervention?**
- 2. What new skills have you been introduced to?**
- 3. How do you feel about what you have just experienced?**
- 4. What impact will it have on your behaviour?**

This exercise sheet and your answers can then be used as evidence of your critical thinking and analytical skills and offered as part evidence against one of the competencies in the matrix.

CASE HISTORY TEMPLATE (A case for further learning)

Name	
Agency /Authority / Body:	
Position:	
Date:	
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the context in which this arose.</i>	

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations

After this experience please write down what you wish to recommend in each of the following areas:

Be sure your recommendations are feasible.

For your own personal action or development?

For general operational (service) improvement?

For a training opportunity to help new project managers?

Identify possible Learning/Training Needs

Use your recommendations for your personal actions in your Organisational Development Plan

Notes

State any additional element that you consider useful for this case history. Use this section for further concluding remarks.

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

CASE HISTORY EXAMPLE - NETWORKING **(A case for further learning)**

This is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others. Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use this for the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

Name	Name
Agency / Authority / Body:	Regional Development Agency
Position:	Executive Director/Project Manager
Date:	March 2008
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	NETWORKING
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
Our organisation was invited to participate as a partner in a Call for proposal 2009, European Parliament, DG Communication. The leading partner is one of our long-term partners in the country. They needed partnership from organisation with well developed network in the country. The time was very short (only 1 week) and we had to react immediately in order to keep the deadline. As a project manager I had to contact 20 experts from our network and to take their consent to be part of the project.	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the context in which this arose.</i>	
Our organisation uses Internet based information system, which serves the whole network.	

Through it, our members have access to information on: regional development; contacts with external organizations on a local, regional, national and international level; current and expected bilateral and multilateral development programmes, workshops and seminars, etc. The Information System enables to be discussed problems related to operational coordination of the members and also facilitates effective exchange of information needed on regional development and SME support process in the country and abroad.

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

This information system allows us to be very fast in different situations. I sent the information about the project to our network and in the frame of 4 hours I received the feedback from 80% of the network. This allowed me to take decision and to give positive answer for our participation to the leading partner. I also started preparing the documents of our organisation needed for project submission. On the next day, I received answers from the rest 20% of the network (contacting some of them by phone) and at the beginning of the third day we sent our documentation package to the leading partner. Everything was well developed and on the next day the leading partner informed us that the project proposal had been successfully submitted. We informed our network as well.

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

From the situation I have described, I believe that I have

learned that ... using the new information technologies could be very important for the success of the organisation. The trust between groups of people is a base for fast actions.

learned how to use the information system for project development in a short period of time.

learned to be ... more open-minded to the new technologies and to use that in the work

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations

After this experience please write down what you wish to recommend in each of the following areas:

Be sure your recommendations are feasible.

<i>For your own personal action or development?</i> Upgrading ICT knowledge <i>For general operational (service) improvement?</i> Improve your knowledge and skills as a PM and particularly ICT knowledge. Keep permanent relationships with different stakeholders <i>For a training opportunity to help new project managers?</i> Training in management based on ICT Introduction to Quality Management Systems
Identify possible Learning/Training Needs <i>Use your recommendations for your personal actions in your Organisational Development Plan</i>
PCM based on ICT
Notes <i>State any additional element that you consider useful for this case history. Use this section for further concluding remarks.</i>

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

CASE HISTORY EXAMPLE – RESULTS ORIENTATION (A case for further learning)

This is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others. Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use this for the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

Name	Name
Agency / Authority / Body:	Regional Development Agency
Position:	Project Manager
Date:	30 May 2008
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	RESULTS ORIENTATION
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
It was my first project and in fact the first day at work and we had to play the Final Event of a very important EU Project, the ALSO Project (Achievement of the Lisbon and Gothenburg Strategy Objectives by INTERREG), in order to present its main outcomes.	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the context in which this arose.</i>	
I had to invite and to involve not only all the partners project but also key players engaged in territorial cooperation and local development at different levels.	
Positive context: I had very experienced and supportive senior colleagues and a collaborative environment. I had just this project to focus, no other distraction.	

Negative context: I was very new on the project therefore I knew neither the partners nor the actors and besides I had very little experience in the implementation of EU Projects.

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

Considering the fact that I had to contact more than 500 people, the month of August presented unexpected hurdles as most of the people concerned were on holiday.

The persons to be contacted were at different levels, belonged to different backgrounds, regions and countries and, in some cases, they spoke different languages. To make the tasks more difficult, they were not reachable most of the time.

Anyway I managed it successfully thanks to my language skills in English and French, but in general thanks to my perseverance and persistence, which was entirely oriented to attain positive results. As a result, more than 180 participants attended the event.

First of all I tried to contact them repeatedly, until I got the right person. I took care of all the speakers (their attendance to the event was very important, in terms of competence and professionalism) by organising their travel and accommodation in the better way, according to each specific request. Even if in some case, it was difficult to come towards speakers and their needs, I tried to find the better solution for everyone, within the budget availability. Diplomacy and a good deal of negotiation had been used to mediate the speaker needs with our strict economic conditions.

Obviously, in this period (about three months dedicated to the event organization) no office hours has been respected; by working more than 10-12 hours each day in the last 15 days before the event, I was able to finish my work, in all its aspects.

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

From the situation I have described, I believe that I have

learned that I must plan all aspects and anticipate problems that may arise in the future. I also learned the value of being patient and perseverant.

learned how to correspond, communicate, interact at different levels from different backgrounds and how to multi-task. I learned how to follow the same repeated activities without losing focus.

learned to be organised, patient and methodical.

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations

After this experience please write down what you wish to recommend in each of the following areas:

Be sure your recommendations are feasible.

For your own personal action or development?

To define all the activities in time, considering possible slight hitches; to work regularly day by day, in order to follow all the tasks without omissions. For this reason, it is necessary to make a list of priorities.

For general operational (service) improvement?

To prepare useful and complete database appropriately fill with all contact information; it is necessary to understand that database represent a very important source to be reused in different contexts, not only as important contacts to invite to the meeting, events, but also as potential partners for new projects.

A complete database is the first step to achieve a positive result in terms of a wide participation to the event.

To make the communication clear and target oriented.

For a training opportunity to help new project managers?

- To plan the Agenda in time;
- To manage all the contacts (by mail, telephone..) regularly; it means efficiency and reliability;
- To organize an efficient communication plan, which has to be as much as possible direct and attractive.

Identify possible Learning/Training Needs

Use your recommendations for your personal actions in your Organisational Development Plan

I think that for this activity it isn't necessary to attend any particular training; the courses on the events organization are, often, theoretical trainings. At this level, I think that the experience reached by managing other similar events, could be more useful to achieve the result expected.

Notes

State any additional element that you consider useful for this case history. Use this section for further concluding remarks.

Issues around work-life balance could arise if this situation happened frequently.

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

CASE HISTORY EXAMPLE - ORGANISING (A case for further learning)

This is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others. Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use this for the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

Name	Name
Agency /Authority / Body:	Regional Development Agency
Position:	Project Manager
Date:	4/02/09
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	ORGANISING
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
Our agency created the framework for the participation of local players of the tourist sector in a trade show completely open to all opportunities of business in global tourism. Our aim was the promotion and distribution of tourist packages that concentrated on our marginal area, with particular regard to the cultural heritage. Being responsible for the selection of the business people and professionals included in our delegation, I identified (1) a tour operator dealing with tourist incoming (2) the representatives of an association for bed and breakfast accommodation. During the trade show I personally realised that the association for bed and breakfast was not in the position to deal with potential buyers visiting our stand. After the trade show I discovered - thanks to a partner - that the tour operator had not emphasised our marginal area and had not even mentioned the cultural heritage.	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the</i>	

context in which this arose.

Our agency is responsible for the development of tourism in our marginal area. Normally this activity implies the production and distribution of a great deal of promotional materials. This aspect is very important, especially in case of our territory where the tourist potential of the marginal area was not promoted at all before our action. Promotion, however, does not create any actual development if appropriate commercial actions are not undertaken.

Commercial activities require high levels of competencies in the field of tourism. The market trends must be investigated, the whole distribution system must be analysed, and the main trade exhibitions must be attended.

Now, thanks to a particular partnership, our agency was able to recover the gap in the commercial area and created the conditions for the direct participation of players of the tourism sector in one of the main European trade shows dedicated to tourism. In particular, the selected trade show was not directed to wide audience and to institutions. It was totally business oriented and represented therefore a great opportunity in commercial terms.

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

When the participation in the trade show was established, I was appointed to select the players to be involved in our delegation.

After discussion with my director, it was decided to involve both (1) local tour operators dealing with tourist incoming (2) representatives of the bed and breakfast providers' association. This choice was based on the necessity to follow two different distribution strategies. The first one is the traditional one implying the commercial relationship between local tourist resources and services, incoming tour operators, outgoing tour operators, agents, clients. The second one is based on the direct relationship between the local tourist resources/service and the final client.

The different elements of our delegation are analysed separately, because they have requested different organisational steps.

(1)

- I called the only incoming tour operator dealing in our territory.
- As this operator already knew the aims of the specific project that had generated the opportunity of participation in the trade show, I simply referred to the project.
- I focused my communication on the logistic aspects: dates of the trade show, necessity to set up a list of meeting with buyers, use of our facilities (stand, promotional materials etc.).
- I met the tour operator in our stand at the trade exhibition.
- I realised with pleasure that the professional approach to the buyers was totally appropriate.
- I realised that a good deal of meetings with potential buyers was carried out.
- I did not request any report regarding the results of negotiations, in order to avoid any problem of commercial confidentiality.
- After some months, I discovered thanks to a partner that the tour operator had not promoted the tourist resources of our marginal area and had even not mentioned the cultural heritage.

(2)

- I called the representatives of the association of bed and breakfast.
- As those operators already knew the aims of the specific project that had generated the

opportunity of participation in the trade show, I simply referred to the project.

- I focused my communication on the logistic aspects: dates of the trade show, necessity to set up a list of meeting with buyers, use of our facilities (stand, promotional materials etc.).
- I travelled with the representatives of the mentioned association and accompanied them to the trade exhibition.
- I was disappointed when I realised that the association's representatives did not interact properly with the buyers. They were trying to promote our territory in general terms and their bed and breakfast in particular terms, whereas the buyers wanted to know the conditions of purchase of tourist packages in order to be enabled to propose them to their clients.
- I realised that the meetings were totally ineffective and that buyers had the impression that they were wasting their time.
- I was not in the position to make the association's representatives reflect on this situation, but just realised that their role was not appropriate for the participation in a trade show.

As a result, I realised that none of the members of our delegation had properly promoted the tourist offer of our marginal area, especially if the cultural heritage is considered.

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

From the situation I have described, I believe that I have

learned that ...

activities must be delegated to the APPROPRIATE players. If a collaborator / colleague / partner does not have the appropriate professional capacity or is not in the position of giving the proper contribution, it does not make sense to involve them.

learned how to ...

be CLEARER when an activity is delegated. We cannot presume that our collaborators / colleagues / partners share the project's aim. We must make them aware that if they do not support our action fully, we would prefer them not to become involved.

learned to be ...

much more careful in the phase of control of the performances, once an activity is delegated.

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations

After this experience please write down what you wish to recommend in each of the following areas:

Be sure your recommendations are feasible.

For your own personal action or development?

I have concluded that higher knowledge and competencies in the tourism sector could help me as project manager willing to control the appropriate performance of the actions undertaken by collaborators/colleagues/partners within tourism projects.

For general operational (service) improvement?

We should establish clearer procedures of control of the performances of our local partners. They have to realise that our agency is willing to check the actual results of any action, once delegated.

For a training opportunity to help new project managers?

They should be enabled to apply the procedures of control mentioned in the point above.

Identify possible Learning/Training Needs

Use your recommendations for your personal actions in your Organisational Development Plan

I should learn how to undertake actions of continuous control of the partners' performances, once actions have been delegated. I should learn to make a positive pressure, where authority is somehow mixed with the impression to receive support!

Notes

State any additional element that you consider useful for this case history. Use this section for further concluding remarks.

When you are fully involved in a project you risk to forget that the basic aims of the action can be forgotten or neglected by your local partners or even colleagues. What is extremely clear to you is often unclear to others. It is necessary to remind the very basic aims when an action is delegated.

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

CASE HISTORY EXAMPLE - COMMUNICATION

(A case for further learning)

This is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others. Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use this for the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

Name	Name
Agency /Authority / Body:	Regional Development Agency
Position:	Project Manager
Date:	5/06/08
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	COMMUNICATION
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
The problem was with the realisation of the project. The operator was not so efficient, he didn't respect the time limit and he changed the time scales and outcomes without my agreement.	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the context in which this arose.</i>	
I was required to ensure the creation and the administration of the new Web site of UNIC. I had to create all the new design and the new content. I needed to work with an operator. This person was supposed to advise me and to realise the new website. I didn't select myself the operator.	

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

The main problem was in the realization of the project. The operator was imposed on me and I haven't the right to change of. I design my website in French and in English, I have created dynamic heading and I was supposed to manage the administration of the website myself.

I made a plan of communication for the launch of the new website (media, internal communication...).

At the launching date, the website was not online, English version was not ready and I was not able to administrate the website myself. 5 months later, the French version was nearly ready. The English version was not. I was not able to administrate the website.

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

From the situation I have described, I believe that I have

learned that ... the operator should be chosen by the project manager by an invitation of tender.

learned how to ... manage a person who did not respect the contract.

learned to be ... patient....

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations

After this experience please write down what you wish to recommend in each of the following areas:

Be sure your recommendations are feasible.

For your own personal action or development?

You need to communicate in appropriate way. Sometimes you need to be assertive and sometimes

you need to give up

For general operational (service) improvement?

You need to pre-discuss the condition of working and to be sure of the choice of the operator.

For a training opportunity to help new project managers?

The best is to choose yourself the operator because you manage the project. If it is not possible, you have to know to be diplomatic in order to work as well as possible.

Identify possible Learning/Training Needs

Use your recommendations for your personal actions in your Organisational Development Plan

Sometimes you have to impose your working conditions even if it is not always easy.

Notes

State any additional element that you consider useful for this case history. Use this section for further concluding remarks.

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

CASE HISTORY EXAMPLE – DECISION MAKING (A case for further learning)

This is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others. Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use this for the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

Name	Name
Agency /Authority / Body:	Regional Development Agency
Position:	Project Manager
Date:	4/03/09
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	DECISION MAKING
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
As a project manager in a big international project, I had to solve a financial problem with one partner.	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the context in which this arose.</i>	
It was an international project in which 12 partners were involved from 6 countries. Each partner had its own financial system and had to obey its own national rules.	

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

We as lead partner were responsible for whole project implementation within the program Leonardo da Vinci. We had a contract with the managing authority and with each project partner. Individual costs expended regarding the project, had to be accompanied by the relevant financial documents.

One partner was unwilling to submit to the lead partner the requested financial documents because their national legislation does not require having financial documents on paper only in electronic form.

Other partners did not have any problems with this. I try to solve the problem with partner individual, but at the end we had to ask for help the managing authority, which involved to this European Commission.

The result was that mentioned partner have the necessary documents printed from an electronic system to track evidence and elaborated the statement that in this way are accepting in their country by national law.

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

From the situation I have described, I believe that I have

learned that I have to cooperate and negotiate individually with any partners involved in international projects

learned how to solve problems within the international partnership

learned to be flexible and open to new challenges

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations

After this experience please write down what you wish to recommend in each of the following areas:

<i>Be sure your recommendations are feasible.</i>
<i>For your own personal action or development?</i> Individual approach to the problem as well as to partner <i>For general operational (service) improvement?</i> At the first meeting, the clear and unconditional implementation to determine the conditions and record them in the minutes of all the tasks, deadlines and responsibilities. <i>For a training opportunity to help new project managers?</i> To be consistent, discuss and agree discuss, keep accurate archives and records.
Identify possible Learning/Training Needs <i>Use your recommendations for your personal actions in your Organisational Development Plan</i>
Training for project cycle, financial management, archiving, effective communication
Notes <i>State any additional element that you consider useful for this case history. Use this section for further concluding remarks.</i>

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

CASE HISTORY EXAMPLE – METHODICAL (A case for further learning)

This is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others. Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use this for the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

Name	Name
Agency /Authority / Body:	Regional Development Agency
Position:	Project Manager
Date:	December 2007
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	METHODICAL
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
We were one of the partners involved in the elaboration of a project proposal to be submitted under INTERREG IV C – second call. Taking into consideration our organisation's experience in the elaboration and implementation of cooperation projects within INTERREG IV C – first call, we decided to assist the lead partner in the elaboration of a new project proposal.	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the context in which this arose.</i>	
The project consortium was composed of 11 regions from 10 European countries. All partners have identified innovation as a key priority in regional development and have confirmed the importance of the project theme in their current environment.	

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

I was involved in supporting the lead partner for the elaboration of this new project proposal. I studied the Manual Programme for the second call which was similar with the Manual for the previous call. Moreover, I analysed the recommendations received from the Monitoring Committee after the evaluation of the project proposals submitted under the first call in which SE RDA was either partner or lead applicant.

I suggested to the Lead Partner the following:

- the project description to be clear and concise, the activities to be coherent
- the impact of the project on regional policies to be clearly demonstrated and also the value for money to be demonstrated;
- a balanced budget between the consortium;
- the payment forecast to be realistic

Moreover, in order to have a smooth implementation of the project we agreed:

- to define an organisational structure to make people assume their role within the project;
- to detail a working plan per each organisation;
- to identify and share common working methods and tools to support project coherent implementation (e.g. Communication Strategy, Stakeholders Involvement Plan, Minutes Format, Attendance List Format, Internal Tool for Monitoring and Control, etc.).

The partners appreciated the strong support that would facilitate the whole project elaboration and implementation.

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

From the situation I have described, I believe that I have

learned that a methodical approach contributes to a smooth project implementation

learned how to benefit from the previous experiences

learned to be more supportive and comprehensive

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations <i>After this experience please write down what you wish to recommend in each of the following areas:</i> <i>Be sure your recommendations are feasible.</i>
<i>For your own personal action or development?</i> To utilise the advice and guidance of a more experienced colleague <i>For general operational (service) improvement?</i> To define common working tools that can easily be used in different cases! <i>For a training opportunity to help new project managers?</i> To have a methodical approach and systematic thinking!
Identify possible Learning/Training Needs <i>Use your recommendations for your personal actions in your Organisational Development Plan</i>
Training needs: project cycle management
Notes <i>State any additional element that you consider useful for this case history. Use this section for further concluding remarks.</i>

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

CASE HISTORY EXAMPLE – PROBLEM SOLVING (A case for further learning)

This is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others. Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use this for the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

Name	Name
Agency /Authority / Body:	Regional Development Agency
Position:	Project Manager
Date:	2007
Competencies of reference: What are the competencies that form the basis of this case history? <i>e.g. I am writing about networking and decision making</i>	PROBLEM SOLVING
State the situation <i>Write a brief paragraph describing a situation you found yourself in within the last 12 months.</i>	
The restoration of an old and derelict house in the town centre of Tokaj and its successive transformation into the local tourism office was a major part of a Hungarian-Slovakian Interreg project. The originally selected house has been claimed by an individual as his own and the ensuing legal procedure prompted the selection of another house. Shortly after the beginning of the restoration process we were forced to freeze our activities by the Hungarian Office for the Protection of Immovable Objects. This was in January and the opening of the tourist office was scheduled for May. One month later the new local government of Nagykapos (our partner in the project) has threatened with the immediate termination of the project on their side.	
State the history / background of the facts <i>The situation cannot be analysed without considering the external environment, so describe the context in which this arose.</i>	

The HU-SK-UA (Hungary – Slovakia – Ukraine) Interreg IIIA Neighbourhood Programme was an important tool for development in the Észak-magyarország region of Hungary. Interreg projects must by definition involve participants from at least two countries along a border region.

Ours was a joint project with the town of Nagykapos in Slovakia. The main element of the project was the development of a tourist office in both towns. A decision had been made in Tokaj that instead of the construction of a new building an old and dilapidated house should be restored in the town centre for this purpose.

This way the town would not only gain a new and sorely needed tourist agency but the general appearance of the town centre would also improve.

Please state and analyse the facts describing the situation in detail – this can be one with either a successful or problematic outcome. Some questions to help you: what exactly was the problem? What was the cause? What went well? Who was involved? What exactly were they doing (or not doing)? What should they have been doing? What were the options, and likely results? What were the results of your action?

Crisis 1 – August 2006

After all the necessary plans have been prepared and accepted we were practically ready to start the restoration process. At this point an individual claimed that instead of the Local Government of Tokaj, he is the actual owner of the premises. Apparently some mistakes were made in the 1950s at the local Land Registry Office. The ownership dispute was promptly put on a legal course which could be expected to last for several months (or years). The strict deadlines of the project made it necessary to abandon the original plan and find another building very quickly. After a fast negotiating round involving all relevant partners we managed to select and secure another building for the purpose.

Crisis 2 – January 2007

After the preparation, submission and acceptance of the new plans we had just started the renovation of the second building. At this point a fax message arrived from Hungarian Office for the Protection of Immovable Objects. The letter ordered the stoppage of all activities stating that although the building itself is not protected its surroundings are, and therefore a licence has to be issued by the office before the construction process can continue. Several (very heated) emergency meetings were held in a very short time. As per the final result we had to perform (again) several modifications in the architectural plans and they were finally accepted by the Office for the Protection of Immovable Objects.

Crisis 3 – March 2007

Local elections have resulted in the formation of a new local government in Nagykapos (our project partner). The new leaders did not understand the need for the project and - although the project itself was close to its finish - threatened to cancel their involvement entirely. We invited them for a short visit to Tokaj and in the course of the visit convinced them about the feasibility and the importance of the project. After their return they shortly informed us about their full support and cooperation going forward.

The project was finally and successfully completed in July 2007.

Throughout the project I received continuous and strong support from the Local Government of Tokaj and several other local organisations and individuals. I am certain that without this support the project could not have been successfully completed.

Please continue your answer on the back of this sheet if you run out of space here..

Reflect upon the situation

This is an opportunity for you to learn from this situation and about your actions. To do so, please finish the following sentences:

From the situation I have described, I believe that I have

learned that as a project manager you always have to expect the unexpected. Any one of the three mentioned obstacles could have easily thwarted the project. Yet with the will and determination of interested parties the troubles were overcome.

learned how to act and react quickly in abrupt situations that are threatening the execution of the project.

learned to be resourceful and open to unorthodox solutions if that is what the situation requires.

Each of these responses in turn will highlight a new piece of knowledge, a new skill you have acquired along the way and an insight into your attitude and behaviour in respect of this situation

Recommendations

After this experience please write down what you wish to recommend in each of the following areas:

Be sure your recommendations are feasible.

For your own personal action or development?

A project manager has to know everything and everyone - as much as it is possible. The main focus has to be on the actual issue and giving up is simply not one of the options!

For general operational (service) improvement?

It is very hard to be prepared for situations described in this case history. An important lesson from this perspective is to have a very clear system of responsibilities and authorities that enable quick reaction on the appropriate level.

For a training opportunity to help new project managers?

Negotiating techniques need to be taught.

Identify possible Learning/Training Needs <i>Use your recommendations for your personal actions in your Organisational Development Plan</i>
Negotiation techniques.
Notes <i>State any additional element that you consider useful for this case history. Use this section for further concluding remarks.</i>
In case of a joint interregional project (such as this one) project costs are eligible for EU funding only if the project is successfully completed on both sides of the border. It means that if the Hungarian part of the project had not been accepted, the costs of the Slovakian partner would not have been recovered.

Footnotes:

Project managers are expected to operate at Level 3 in each of the competencies upon appointment, and to be working towards achieving Level 4. Project team members may be working at Levels 1, 2 or 3 in different competencies, depending upon the requirements of their project.

Using journal writing to enhance reflective practice

David Boud, University of Technology, Sydney

We write journals for many different reasons prompted by many different purposes. We may want to capture an experience, record an event, explore our feelings or make sense of what we know. We may want to narrate something of importance so that others can see what we saw in it. Sometimes we write primarily for ourselves, sometimes for other people. Journal writing is as varied as those who engage in it.

Journal writing can be viewed through many different lenses: as a form of self-expression, as a record of events or as a form of therapy. It can be a combination of these and other purposes. In this chapter I want to examine journal writing through the lens of learning. This perspective views the varieties of journal writing as ways of making sense of the world and how we operate within it. It looks at journal writing as a form of reflective practice that is, as a device for working with events and experiences in order to extract meaning from them. Writing can be used to enhance what we do and how we do it. It may relate to learning in formal courses, to our professional practice or to any aspect of informal learning. In her discussion of using journals in learning through reflection, Jenny Moon (1999a) identifies many purposes of writing journals in addition to those already mentioned (pp188-194). These include:

- To deepen the quality of learning, in the form of critical thinking or developing a questioning attitude
- To enable learners to understand their own learning process
- To increase active involvement in learning and personal ownership of learning
- To enhance professional practice or the professional self in practice
- To enhance the personal valuing of the self towards self-empowerment
- To enhance creativity by making better use of intuitive understanding
- To free-up writing and the representation of learning
- To provide an alternative 'voice' for those not good at expressing themselves
- To foster reflective and creative interaction in a group

Learning is inherent in any process of expression, that is, in any way of giving form to the world as experienced. No matter for what reason we write the lens of learning is an important way of viewing writing. This is not to say that learning is the only perspective on journal writing, but to acknowledge that journal writing is intimately associated with learning, no matter what else it may aim to do.

Learning and reflection

There are many ways of thinking about journal writing in relation to learning. We can look at what journals show that their writers have learned we can examine how writers have learned to express themselves in journals or we can see how journals can help other people learn. The most important aspect for our present purposes though is how individuals can use journals to enhance their own learning.

The process of exploring how journals assist their writers to learn is commonly described in terms of how they can enhance reflection and reflective practice. Reflection has been described as a process of turning experience into learning. That is, of exploring experience in order to learn new things from it. Reflection has been described as ‘those intellectual and affective activities in which individuals engage to explore their experiences in order to lead to new understandings and appreciations.’ (Boud, Keogh and Walker 1985: 19). Reflection involves taking the unprocessed, raw material of experience and engaging with it to make sense of what has occurred. It involves exploring often messy and confused events and focusing on the thoughts and emotions that accompany them. It can be undertaken as an informal personal activity for its own sake, or as part of a structured course. Within a course, it may focus on special activities contrived as a stimulus for learning (eg. workshop activities), on events of the past (eg. what learners bring to the course from prior experience), or on concurrent placements in workplaces and the community. In the discussion that follows, the term ‘event’ is used to refer to any activity from which learning may result whether it is in a classroom, a workshop, a formally scheduled placement or the incidents of life.

Any of these events provide the base material for journal writing and reflective practice. In learning terms, the journal is both the place where the events and experiences are recorded as well as the forum in which they are processed and re-formed. This working with events is intended to make sense of the experiences that result, to recognise the learning that results and to lead to a foundation for new experiences that will in turn provoke new learning.

Models of reflection

The most familiar approach to reflection has been that developed by the late Donald Schön in his books of the reflective practitioner (1983, 1987). Schön argues that a vital attribute of all effective practitioners, no matter in what area they operate, is that they are able to reflect on their ongoing experience and learn from it. He describes examples of architects, musicians, therapists, teachers and others reflecting on what they do as they go about their everyday practice. He calls this reflection-in-action. Just as important as this aspect of reflection, however, is the considered reflection that takes place away from the press of immediate action when we pause and take stock of what we are doing. This may occur driving home at the end of the day, in the bathtub or when discussing what we do with colleagues or friends.

It is in this latter category that journal writing most often fits. Writing is a means of puzzling through what is happening in our work and in our lives. In some courses it is formalised even further and very specific guidelines and workbooks may be provided. However, in this chapter I want to focus on those features of reflection that aid learning independent of particular course requirements. Later in it, I shall discuss how some course requirements and influences from the contexts in which journal writing occurs inadvertently inhibits the very learning which writing is designed to foster.

In parallel with Schön’s work on reflective practice, I have been involved in exploring reflection from the point of view of someone trying to learn from their normal complex and unruly experience. Over a number of years I have been involved with colleagues in developing a model for learning from experience and the place of reflection in it. We have done this to provide a means of focusing the attention of learners, and those who assist them, on some of the key features that appear to inhibit or facilitate learning (Boud, Keogh and Walker 1985, Boud and Walker 1990, Boud and Walker 1998). Each aspect of the model has implications for journal writing. To highlight the varieties and forms of journal writing discussed elsewhere in this book which can be used to facilitate reflection and

learning from experience, I describe the main features of the model and discuss the implications for journal writing of each in turn.

The basic assumption of the model is that learning is always grounded in prior experience and that any attempt to promote new learning must take account of that experience. All learning builds on existing perceptions and frameworks of understanding and links must be made between what is new and what already exists if learners are to make sense of what is happening to them. Learners bring to any event their *personal foundation of experience*. This is a way of describing the influence of all their previous experiences on them now. Past experiences profoundly affect perceptions of what does and does not count as important, it acts to sensitize us to some features of our world and blind us to others and it shapes the *intent* we have which guides our priorities.

The second assumption is that the process of learning from experience is necessarily an active one involving learners engaging with the events of which they are part. Much of the benefit of participating in any event derives from how we can shape our participation to suit our goals.

Occasions of reflection

While reflection is conventionally thought of as taking place after something has happened, such a view can tend to construct learners as passive respondents to events. It is useful to consider three occasions of reflection: in anticipation of events, during them and afterwards. Journal writing has a significant role to play at each of these times.

Reflection in anticipation of events

The emphasis here is on what we can do to make the most of future events. What might usefully be taken into account in preparing ourselves for what is to come? While we can never fully predict what will occur, the model suggests that there are three main aspects to take into account. Firstly, a focus on the learner - what intent and specific goals do we bring to the event? What are our expectations of the event and the outcomes? How strongly do we hold our intentions, and will these blind us to other possibilities of which we are as yet unaware? Journals can be used to explore what we want from involvement in any activity. We write about what we bring to the situation, what we want out of it and what we need to be mindful of which may distract us from our intentions. The more complex and unfamiliar the situation, the more difficult it will be to keep track of the reason for being there.

The second consideration is a focus on all aspects of the context. Usually, many if not most of the features of an event are given and cannot be altered. Sometimes we are briefed on what might happen, but often we have to discover this for ourselves. Journal writing helps clarify questions we need to address about the situation we are entering, that is, what we need to know to make the event a productive one for us. Other people may have quite different to us about what will happen.

This is particularly true of work placements where the learner must fit with the everyday practices of the workplace. How might people there view things and what are the implications of that? Journals can be used here to record what we know of the context and what is possible.

The third aspect is a focus on learning skills and strategies. It is not sufficient to focus on what we bring and what the context will be like, we need also to equip ourselves to make use of the opportunities available. What must we notice in order to be fully involved and understand what is going on? What guides or learning-to-learn strategies can we usefully develop and take with us?

What might we need to rehearse before we start? Journals allow us to practice imaginary scenarios, to ask 'what if', to plan what we need to take to the event, to try out forms of record keeping that might be suitable and to trial conversations and interactions with key players we will meet. A useful question to ask at this stage is what will I do if my assumptions about the event are wrong? What will I be able to fall back on to cope effectively?

Reflection in the midst of action

It is engagement with an event that constitutes a learning experience. The model points to key features of learning in the midst of action. Through *noticing*, *intervening* and *reflection-in-action* we can steer ourselves through events in accordance with what our intentions are and what we take with us to help us through the process. *Noticing* is about becoming aware of what is happening in and around us. It is directed towards both the external world of events and the internal world of a thoughts and feelings. Noticing affects the extent to which we become actively involved in the process, whether or not this is observable by others. *Intervening* refers to actions we take to change the situation we find ourselves in. Again, intervening may not be overt and noticeable to others. The conscious decisions not to speak, or to focus attention on thoughts and feelings rather than external activities, are forms of intervention (intervention in our internal learning processes) just as much as a provocative question or a physical act.

Reflection-in-action describes the process of working with noticing and intervening to interpret events and the effects of one's interventions. For much of the time these factors are invisible and unconscious and, as Schön eloquently points out, they are part of the artistry of effective practice. However, in developing expertise of any kind it can often be helpful to become more deliberate and conscious of the process and aware of the decisions being made by others and ourselves. It is through exposing these decisions to scrutiny that the assumptions behind them can be identified and a conscious decision taken to act from a new perspective.

While there may be few opportunities to write in the heat of the moment when events are rapidly changing, enough needs to be recorded to prompt fuller exploration when there is time to do so. On some occasions it may be possible to schedule timeout for reflection. This can be particularly useful in some placements as journal writing can be used to prompt awareness of new features of the situation and plan new interventions that can be implemented almost immediately and the effects observed.

Reflection after events

Much important reflection can occur once the immediate pressure of acting in real time has passed. Some learning inevitably takes time and the ability to view particular events in a wider context. Reflection following events has been discussed in the literature for many years, but it is important to emphasise that it is not simply a process of thinking, but one also involving feelings, emotions and decision-making. We can regard it as having three elements: *return to experience*, *attending to feelings* and *re-evaluation of experience*. These are features of reflection at all stages and what is written here is also applicable at earlier stages.

Return to experience.

The base of all learning is the lived experience of the learner. To return to this and recapture it in context with its full impact allows for further reflection. Often too little emphasis is placed on what has happened and how it was experienced at the time. Judgments about this are made prematurely and possibilities for further learning can be shut out forever. Mentally revisiting and vividly

portraying the focus experience in writing can be an important first step. The role of journal writing here is to give an account of what happened and retrieve as fully as possible the rich texture of events as they unfolded. The emphasis is on conjuring up the situation afresh and capturing it in a form that enables it to be revisited with ease.

Attending to feelings.

As part of returning to the experience, we need to focus on the feelings and emotions which were (or are) present. These feelings can inhibit or enhance possibilities for further reflection and learning. Feelings experienced as negative may need to be discharged or sublimated otherwise they may continually distort all other perceptions and block understanding; those experienced as positive can be celebrated as it is these which will enhance the desire to pursue learning further.

Expressive writing has a particular role in working with our feelings. Journals are not just the place for writing prose. Images, sketches, poems, the use of colour and form and differently draw words are among devices that can be used as vehicles to express ways of experiencing. Streams of consciousness writing in which words are poured out without pause for punctuation; spelling or self-censorship can be of value here. Rainer (1980) has, for example, many good examples of expressive forms of writing.

Re-evaluation of experience.

Re-acquaintance with the event and attending to and expressing the thoughts and feelings associated with it, can prepare the ground for freer evaluation of experience than is often possible at the time. The process of re-evaluation includes, relating new information to that which is already known; seeking relationships between new and old ideas; determining the authenticity for ourselves of the ideas and feelings which have resulted; and making the resulting knowledge one's own, a part of one's normal ways of operating. These aspects should not be thought of as stages through which learners should pass, but parts of a whole to be taken up as needed for any particular purpose. These reflective processes can be undertaken in isolation from others, but doing so may often lead to a reinforcement of existing views and perceptions. Working one-to-one or with a group for which learning is the *raison d'être* can begin to transform perspectives and challenge old patterns of learning. It is only through give and take with others and confronting the challenges they pose that critical reflection can be promoted. From the more diligent writing of return to experience, and the expressive modes of attending to feelings, re-evaluation is about finding shape, pattern and meaning in what has been produced. It involves revisiting journal entries, of looking again at what has been recorded, of adding new ideas and extensions of those partially formed. It addresses the question: what sense can I make of this and where does it lead me? It involves trying out new ideas and asking the 'what if' questions mentioned earlier. Re-evaluation is the end of one cycle and the beginning of another as new situation are imagined and explored.

Inhibiting reflection

So far this chapter has focused on occasions of reflection and ways journal writing can be positively used at different times and in different modes. However, there are many features of the contexts in which writing occurs that get in the way of learning and block reflection completely. The exploration of the self that reflection involves requires a relatively protected environment in which one is not continually preoccupied by defending oneself from the scrutiny of others. This is not to say that journal writing cannot usefully take place in the most adverse of conditions. The prison diaries and notebooks of such various thinkers as Dietrich Bonhoeffer (1943-1945) and Antonio Gramsci (1927-1935) are testimony to the power of reflective writing. The conditions of contemporary journal

writers in formal courses may be less physically oppressive, but nonetheless they can inhibit reflection. The more that journal writing moves into the realm of critical reflection, that is, the questioning of taken-for-granted assumptions about oneself, one's group, or the conditions in which one operates, the more it is necessary to consider the inhibiting gaze of others. The more that journals are used to focus on those characteristics of reflection such as 'perplexity, hesitation, doubt' (Dewey 1933), 'inner discomforts' (Brookfield 1987) or 'disorienting dilemmas' (Mezirow 1990), the greater the account which needs to be taken of the interventions of those who may read one's writing.

Who is the reader?

One of the main inhibitors is the prospect of others reading one's journal. These could be peers, employers, teachers or indeed anyone. The expectation of writing for an external audience can profoundly shape what we write and even what we allow ourselves to consider. The range of consequences of being read by others can stretch from mild embarrassment to loss of a job or even worse.

For example, revealing one's negative feelings about the difficulties of classroom practice could have a substantial influence on how a student teacher is seen by supervisors and may lead to failure to graduate. Whether or not this is the reality of the situation, simply imagining such an occurrence may be a barrier to recording such feelings. Keeping journals private, away from the eyes of others, can be a useful principle to adopt in courses. It means that writing may not be as constrained, as it would be if it were going to be revealed to others. At the very least, the postponing of decisions about whether writing is to be revealed, to whom and in what form, can be liberating. It can release creativity and a flow of representation that can always, later, be censored and shaped for others.

Formal assessment

Many of the ideas about learning from experience have developed in situations unconstrained by the requirements of educational institutions. Therefore great care needs to be taken in translating them into a formal setting. One feature of accredited learning has considerable potential to adversely affect learning through journal writing. It is the assessment practices of the program in which a student is enrolled. A particular common example is that of grading and assessment of journals. The conventions of assessment demand that students display their best work for it to be judged. Students are therefore interested in portraying themselves in the best light possible. It is in their interests to demonstrate what they know and disguise what they don't know. This is quite the opposite of what is required for reflection. Reflection involves a focus on uncertainty, on perplexing events, of exploration without necessarily knowing where it will lead. It is in the interests of their learning for them to express their doubts, to reveal their lack of understanding and to focus on what they don't know.

There is therefore a tension between assessment and reflection that must be addressed in all courses where it may arise. In my own teaching, for example, I encourage students to keep portfolios of reflective material, but say from the start that I will not view them. I point out that unless they feel sufficiently free to write things in their journals they would be embarrassed for me to read, and then they are probably not using them sufficiently freely for them to be good examples of reflection. This does not mean that students cannot use items from their journals in assignments, but that there is a clear separation of writing for learning and writing for assessment purposes. In order to emphasise this distinction, I include as one assignment the production of a self-assessment statement which draws from, but which is distinct from, students' confidential learning portfolios (Boud 1992).

There are some situations in which it may be appropriate to assess journals (Moon 1999b: 91-107 and in Fenwick and English's later chapter in this book). These include, for example, preparation for professional practice in which the use of case notes and commentaries on them are part of normal work. However, it is important to distinguish from the start journals that are essentially available for public or semi-public inspection and those which are designed to prompt reflection. It is misleading to treat all forms of journal writing as equivalent to each other. Their purposes constrain their form, and the use of a single term—journal writing—to convey such widely differing purposes is confusing and risky.

Conclusion

Journal writing is a multifaceted activity that can take many forms for many purposes. It can be used in many different ways to promote reflection. Different strategies and devices can be used at different stages of learning to focus on events anticipated as well as those that have passed.

The conditions under which journal writing takes place can have a powerful influence on what is produced and the extent to which writers can engage in critical reflection. If journals are to be used in courses then great care needs to be taken about how they relate to assessed work. In general, reflective activities should be distinguished from those graded.

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COMPETENCY CLAIM FORM

Competency & level	Summary of evidence claimed
--------------------	-----------------------------

Write a summary of the evidence you are claiming against each competency

An example of how evidence can be claimed for each competency is shown below

1. Networking

Target level =

Level claimed =

Development plan
attached?

yes ☒

no ☐

My case history evidence explains how I have contributed to existing networking relationships through my involvement in local meetings. This has meant that I have to regularly chair these meetings for at least six people from within the organisation and this has meant that we work better together. I enjoy running these but am frustrated by the fact that not everyone always turns up.

This meeting has been taking place now for the last six months and is progressing quite well, I know this because we have achieved a number of changes in our working practice, these include:

- *Example written here*
- *Example written here*

I have not yet worked outside of my known contacts and this is an area that I need to do and my development plan is attached explaining how I need to do this better.

I have learned from my reflection that I need to work on <state specific areas> and this will help with my networking generally

1. Networking

Target level =

Level claimed =

Development plan
attached?

yes ☐

no ☐

Type or write here...

Competency & level	Summary of evidence claimed
--------------------	-----------------------------

Write a summary of the evidence you are claiming against each competency

2. Results Orientation

Type or write here...

Target level = ☐

Level claimed = ☐

Development plan
attached?

yes ☐

no ☐

3. Organising

Type or write here...

Target level = ☐

Level claimed = ☐

Development plan
attached?

yes ☐

no ☐

Competency & level	Summary of evidence claimed
--------------------	-----------------------------

Write a summary of the evidence you are claiming against each competency

4. Communication

Type or write here...

Target level =

Level claimed =

Development plan
attached?

yes ☐

no ☐

5. Decision Making

Type or write here...

Target level =

Level claimed =

Development plan
attached?

yes ☐

no ☐

Competency & level	Summary of evidence claimed
Write a summary of the evidence you are claiming against each competency	
6. Methodical Target level = Level claimed = Development plan attached? yes ☐ no ☐	<i>Type or write here...</i>
7. Problem Solving Target level = Level claimed = Development plan attached? yes ☐ no ☐	<i>Type or write here...</i>

COMPETENCY CHECK POINT

You should keep your numbered evidence and **COMPETENCY CLAIM FORMS** in a portfolio and use this **COMPETENCY CHECK POINT** as an overview sheet to reminder of what you have achieved and where you still need to collect evidence.

Competencies	Numbered Case History / Other evidence			
Levels	1	2	3	4
1. Networking				
2. Results orientation				
3. Organising				
4. Communication				
5. Decision Making				
6. Methodical				
7. Problem Solving				

The Competency Check Point can be used to:

- Map all claimed evidence against the seven validated competencies
- Provide a quick overview to what is being claimed against single or multiple competencies
- Cross reference evidence claims for easy assessment and validation

Please note that all evidence claimed must be:

- **Authentic** – show clear authorship / labelling attributed to the individual making the claim
- **Current** – relate to current activities taken place within the last 12 months
- **Sufficient** – provide enough to demonstrate that claimant really does meet the competency
- **Valid** – offer proof that the evidence is fit for its purpose and meets the competency level
- **Manageable** – achieve a balance between quality of evidence and quantity of evidence

Ground rules for running role-plays

Some people get very nervous ‘acting’ in front of others, so be sensitive to the fact that this approach might not be suitable for everyone.

However...

This is a very powerful way to learn and there are some ground rules and guidelines that you should follow to get the most from this method.

Ground rules

1. Everyone has the right to be heard
2. Everyone has the right to choose to be helpful or unhelpful
3. Allocate various roles, e.g. Project Manager, Partner, Beneficiary, Auditor
4. Take a moment to decide what your “role” would want or need from the situation
5. Act out the situation and be aware of your concerns and feelings as the role play proceeds
6. Try out different ways of resolving the situation to get to the one that satisfies most of the players
7. Reflect upon the experience using the Observer / Participant feedback sheet

Method

For the role plays, allocate various roles, e.g. Project Manager, Partner, Beneficiary, Auditor etc... and give everyone time to read through the ‘prepared’ role-play scenarios on pages 60 – 62 or create your own role-play scenarios using the guidance on page 11 (case histories), page 20 (role-play scenarios) and page 64 (how to write case histories and turn them into role-play scenarios).

Take a moment to decide what your “role” would want or need from the situation

Ask the team to ‘act out the situation’ and be aware of your concerns and feelings as the role play proceeds. If your team doesn’t want to act themselves, you may need to arrange, in advance, professional ‘actors’ who can perform on a ‘stage’ leaving you to facilitate the observation and discussion.

Try out different ways of resolving the situation to get to the one that satisfies most of the players. It is useful to ‘act’ out different endings to see how they influence the overall performance.

Encourage reflection upon the experience using the Observer / Participant feedback sheet on page 82.

‘Prepared’ role-play scenario #1 taken from completed case history template

It was my first project and in fact the first day at work and we had to plan the Final Event of a very important EU Project, the ALSO Project (Achievement of the Lisbon and Gothenburg Strategy Objectives by INTERREG), in order to present its main outcomes.

I had to invite and to involve not only all the partners project but also actors engaged in territorial cooperation and local development at different levels.

Positive context: *I had very experienced and supportive senior colleagues and a collaborative environment. I had just this project to focus, no other distraction.*

Negative context: *I was very new on the project therefore I knew neither the partners nor the actors and besides I had very little experience in the implementation of EU Projects.*

Considering the fact that I had to contact more than 500 people, the month of August presented unexpected hurdles as most of the people concerned were on holiday.

The persons to be contacted were at different levels, belonged to different backgrounds, regions and countries and, in some cases, they spoke different languages. To make the tasks more difficult, they were not reachable most of the time.

Anyway I managed it successfully thanks to my language skills in English and French, but in general thanks to my perseverance and persistence, which was entirely oriented to attain positive results. As a result, more than 180 participants attended the event.

First of all I tried to contact them repeatedly, until I got the right person. I took care of all the speakers (their attendance to the event was very important, in terms of competence and professionalism) by organising their travel and accommodation in the better way, according to each specific request. Even if in same case, it was difficult to come towards speakers and their needs, I tried to find the better solution for everyone, within the budget availability. Diplomacy and a good deal of negotiation had been used to mediate the speaker needs with our strict economic conditions.

Obviously, in this period (about three months dedicated to the event organization) no office hours has been respected; by working more than 10-12 hours each day in the last 15 days before the event, I was able to finish my work, in all its aspects.

Consider the issues from each key player’s perspective to find a solution, and identify the learning points to ensure the next project is easier to manage to a successful outcome. What competencies has the project manager demonstrated in this scenario? What competencies might be strengthened for the next project?

‘Prepared’ role-play scenario #2 taken from completed case history template

We wanted to submit a project proposal for the Cooperation Program with Norway. We tried to identify some institutions from Norway in order to support us in implementing the project and for transfer of know-how. There were two weeks until the deadline and we didn't succeed to find out a potential partner for our project.

I participated to all the training sessions organised for the potential applicants to find out the requirements of this program and to identify potential partners interested to cooperate with us. In order to be eligible for this program we had to have a partner from Norway.

The problem was that I couldn't find any partner from Norway for our project. We had a project idea, but we couldn't apply because we hadn't an eligible partner. We hadn't collaborated with Norway so we hadn't a contacts list. We asked for support to the Norway Embassy and the Ministry of Economy and Finance (the National Point for this programme) in order to facilitate us the contact with some institutions from Norway interested in implementing a project with us.

Unfortunately, we didn't receive any positive answer. I also discussed with other Regional Development Agencies representatives and they told me that they confronted with the same problem. I looked on internet and I sent several e-mails to some contacts, but I didn't receive any answer. In this case, we couldn't submit our proposal for this program.

Consider the issues from each key player's perspective to find a solution, and identify the learning points to ensure the next project is easier to manage to a successful outcome. What competencies has the project manager demonstrated in this scenario? What competencies might be strengthened for the next project?

‘Prepared’ role-play scenario #3 taken from completed case history template

I was faced in only one month time to solve a problem raised under the EDUCATIONAL Tour organization. The initiative foreseen the involvement of tour operators and journalist from Chez Republic and is aimed at promote the Marche Region beach tourism. This activity foresees the organization of their travel and accommodation (including the Marche Region tour and meeting with local tour operators).

- *I was the project manager of the project and it was an intense period of deadlines and urgent important tasks to fulfil for me and for my colleagues (i.e I was coming out for 4 days to attend a project meeting abroad);*
- *The initiative promoted within an Interreg project, was managed by me in collaboration with two different Marche Region’s Department (Transport and Tourism) and in cooperation with ENIT (Prague Italian State Tourist Board);*
- *Limited budget for the initiative and the needs to comply all formal procedures to define, the guests’ travel, accommodation and transfer, as well as hostess-interpreter and meeting with local stakeholders.*
- *I organized a start-up meeting with the Marche Region Departments involved in, to define a limited number of participants (limited budget) and draft of programme.*

One week later, the ENIT (Prague Italian State Tourist Board) informed us that one more participants is available to participate at the initiative, and ten days before the guests’ arrival, a local hotel manager propose to host all participants free in his Hotel.

As such, two different situations came out, laid before different problems:

One additional participant:

- *limited budget available for the initiative;*
- *he/she was an important journalist specialized in the tourism communication;*
- *the journalist magazine of reference should have published a special service on Italian tourism; so he/she should has introduce an article on Marche Region;*
- *his/her participation implied to revise all formal procedures already fulfilled and calibrated on a certain number of guests;*

Decide between the free accommodation proposal or not.

- *This option implied to revise all formal procedures already fulfilled and calibrated on a certain kind of accommodation;*
- *Problems on the relationship with the others local operators;*
- *Polarize the initiative a local level and not regional one*

Consider the issues from each key player’s perspective to find a solution, and identify the learning points to ensure the next project is easier to manage to a successful outcome. What competencies has the project manager demonstrated in this scenario? What competencies might be strengthened for the next project?

Observer / Participant feedback sheet for role-play scenarios

Now that you have observed or participated in the role play or discussion, take a moment to consider whether the outcomes were what you expected.

Do you think that the stakeholders have all worked towards a satisfactory solution? Why?

What have you learned from this?

How will you change your working practices as a result?

How to write Case Histories

A Case History is an opportunity for you to reflect upon a situation that occurred while you have been managing projects, and then write about it so that it can provide a learning opportunity for you and for others.

You will find some helpful guidance on reflective writing in the article by Professor David Boud in section 3 in the appendix page 46.

Be honest and thoughtful while you are writing. A difficult experience can sometimes provide more learning than an easy one.

You may also want to use the Case History as the basis of your discussions with your own manager to show that you are working at level 3 or level 4 in the competencies matrix.

Some of these Case Histories will form the basis of Role Play Exercises that will help other people learn from your experience. This is known as Isomorphic Learning = the opportunity to learn from what another person/another organisation has done, without having to go through every experience yourself.

How to use the Case History as a Role Play Scenario

You might want to remove specific names of individuals and organisations from your Case History, and replace them with more general identification, for example, Mr A, Mrs B,..... and Organisation X, Partner Y.

Use the introduction paragraphs to set the scene and then the main body of the Case History will tell the story.

Consider if you want to use your own decision as the ending, or to offer some alternative endings to the situation.

Tips on how to facilitate discussions

This is an alternative to 'acting' role-plays but uses the same material to bring about discussion.

For the discussion, ensure that everyone has had a chance to read the case history or the role-play scenario. Encourage team to read with a pen in hand and make notes on sheet.

Decide whether to share decision making or to appoint one person to chair the group and allocate a time-keeper.

Take each question in turn and ensure that everyone in the group has the chance to contribute.

Questions

- What is happening?
- Who is involved?
- What are the parties doing?
- What should they be doing? (they may be doing the right thing already)
- What if you do nothing? (will matters get worse or better?)
- What are your options?
- What are the likely outcomes?
- What are the learning points for the Project Manager?

Capture key points on a flip chart or computer to review later.



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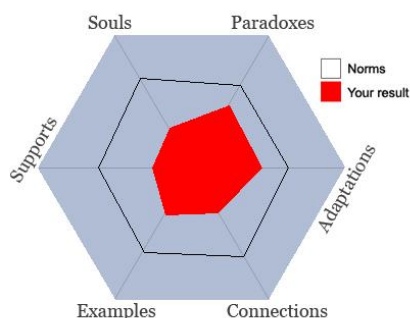
Situational Knowledge Profiler™

Just as everyone has an individual personality and recognised intelligence level, researchers for the Organisation for Quality in Training (OFQT) Ltd, believe that what influences people and their behaviour in either a business or community network setting is the innate way they use their existing knowledge, skills and attitude.

Knowledge, skills and attitude are called learning domains (Bloom, 1956) and everyone uses a varied combination of these in each different situation they face - the results of which affect their outcomes at work, generate reactions from others and affect personal performance.

Gaining a better understanding of how you use your combination in different circumstances helps you to determine key learning, action and change which in turn leads you towards achieving more of what you want.

This is not a test of your 'fixed' personality, intelligence or ability but instead a 'variable cognitive map' presenting you with an opportunity to make sense of the innate way you use your knowledge, your skills and your attitude at work.



Understanding this and learning how it can work for you or against you enhances your ability to, not only recall but also, learn new information, create context-specific knowledge and develop yourself further.

This measurement tool offers you a unique 'traffic light' analysis which guides you through a process of self-development and reflective practice – two vital skills when undertaking learning yourself or helping others to learn how to learn.

It is true to say that before we can transform and change others around us, we need to first look to ourselves.

To find out more about 'cognitive maps' and 'learning domains' use these links:

Cognitive Maps definition http://en.wikipedia.org/wiki/Cognitive_map

Edward C Tolman 'Cognitive Maps' http://en.wikipedia.org/wiki/Edward_C._Tolman

O'Keefe & Nadel 'Hippocampus' <http://www.cognitivemap.net/HCMpdf/HCMChapters.html>

Benjamin Bloom 'Learning Domains' <http://www.businessballs.com/bloomstaxonomyoflearningdomains.htm>



Instructions for completing the Situational Knowledge Profiler™

Follow these simple steps to receive a personal analysis report* that reveals to you and your team the priorities that will affect attitudinal development and improve project management performance. *This is FREE only to users of this VISIBLE Guide.

1. Using a black pen, complete the paper questionnaire (available in the Appendix in section 3) and send it by post to: OFQT Ltd, c/o A. Wilson, Simpson Wreford & Co., Wellesley House, Duke of Wellington Avenue, Royal Arsenal, London UK. SE18 6SS. Please make sure that you also send a large self-addressed envelope so you can receive your report.

Or

2. Type your responses into the electronic version (Word) on the CD-ROM (available from your Regional Development Agency). Save a completed copy to your computer then email this to skp@ofqt.com - a report will then be sent to you by email.

Read each of statements on the following pages.

As you read each statement, consider how true each one is of you and your normal working practice. You can then **allocate up to 8 points** where 1 means that you don't work or think this way at all and 8 means that you do work and think like this all the time. If at any point you feel that a statement in no way reflects an aspect of your normal thinking or behaviour or you don't understand exactly what it means, then score it '1'

You might well say, *"Well, my answers depend on the situation"*. This is true. You are therefore asked to choose a situation first and then use your judgment to allocate a score between 1 and 8 to indicate how true each statement is or isn't for you **in that situation only!**

Your first response is likely to be the most accurate. Try to be honest and balanced as there are no right or wrong answers. Lie detectors have been built in so don't try to second-guess it either – it won't work!

Don't be too modest and focus on what you do more of, and what you do less of without trying to compare yourself with others. Also don't answer as if it is something you would like to do – just answer as you are.

You will receive an analysis report and a validation statement asking you to judge how accurate your 'cognitive map' is for you at this time. Completion of the validation statement is vital for the ongoing development of this tool and the establishment of 'European' norms.



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Situational Knowledge
Profiler™

Start here by first identifying your situation

Choose **ONE** of the issues below that has the most relevance or greatest importance for you at this point in time and put an X in the appropriate box. Your situation will then be noted and your results will be related to this choice.

- | | |
|--------------------------|---|
| ☐ | Work life balance & personal time management issues |
| ☐ | Management of work and people issues (including management & leadership) |
| ☐ | Immediate work problem to resolve or decision to make |
| ☐ | Involved in change for self or others / dealing with work-related change issues |

Now complete questionnaire

- Read the statements on the questionnaire and consider how true each one is for you in relation to the situation you have identified
- Write in your score (between 1 – 8) to indicate your preference on the questionnaire (Remember you answers must relate to your situation and be how you **actually behave** and **NOT** how you think you should)
- If any of the statements are irrelevant or you don't understand them, then score them as '1'

Your first response is likely to be the most accurate. Do not compare yourself with others. Please bear in mind that your responses and the resulting report will be heavily influenced by how you are feeling about your chosen situation.

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Item	Statement	Points between (1 to 8)	
1	I find I can easily manage emails relating to my chosen situation		1
2	I critically read and evaluate journal articles about my chosen situation		2
3	I immediately apply action plans after my own/others coaching sessions		3
4	I use more than one favourite Internet discussion group at least twice a week		4
5	I frequently participate in learning events to enhance my knowledge of my situation		5
6	I like to take the lead whenever a new process has to be introduced		6
7	I often link together new developments from different but relevant areas		7
8	I appreciate the challenge of tackling new ways to approach my chosen situation		8
9	I use fully utilise all aspects of my e-mail system in my chosen situation		9
10	I like spending every opportunity exploring new areas of my chosen situation		10
11	I regularly send important items to other people without being asked		11
12	I often think about happy events from long ago in relation to my chosen situation		12
13	I know and regularly use a range of different ways to communicate with others		13
14	I deliberately find opportunities to network with others in similar situations		14
15	I usually spend time deciding what I want to learn, before going to meetings		15
16	I regularly access files/information held jointly with colleagues in similar situations		16
17	I am delighted when others accept my new ideas and approaches		17
18	I frequently go through my work to delete unwanted material		18
19	I like to share information with colleagues, even if they give me nothing in return		19
20	I willingly volunteer to join new interest groups that support my chosen situation		20
21	I send information to people who are outside my team but in similar situations		21
22	I seek regular peer appraisal and review and thrive on feedback from my team		22
23	I welcome and use the latest computer software and/or other technology		23
24	I refuse to be controlled by systems and procedures in my organisation		24
25	I know I can and regularly do question the actions of my manager		25
26	I consistently find opportunities to contribute to other people's work		26
27	I have been part of an action learning set in the past and enjoyed the process		27
28	I regularly challenge accepted ways of working in myself and others in my situation		28

29	I am happy to experiment with the latest research relating to my situation	29
30	I prefer to get messages from and talk with people I know and trust	30
31	I am enthusiastic when I talk about something new to do with my chosen situation	31
32	I am happy and confident to empower others and give up some control	32
33	I feel that some areas of information are more useful than others and discard surplus	33
34	I welcome and look for opportunities to create new procedures and ways of working	34
35	I prefer to benchmark my work against objective quality standards	35
36	I like going to meetings especially those that are not about my current situation	36
37	I prefer to belong to teams where we have a lot in common	37
38	I believe that delegation is usually worth the trouble it takes in my chosen situation	38
39	I am able to accept ideas from many different perspectives at the same time	39
40	I consider it usually better to create new things based on those that already work	40
41	I regularly include all stakeholders in discussions about my chosen situation	41
42	I feel it is important only to give away knowledge if you can get something in return	42
43	I often use group-briefing sessions to keep myself and others up to date	43
44	I can think of at least three new things I have learnt in the last week	44
45	I work for an organisation / with a team / in a network that really values its people	45
46	I like it that some of the best changes are often unpredictable and unplanned	46
47	I naturally find myself developing other people's suggestions without them asking	47
48	I get asked for my advice by a number of people recently in my chosen situation	48
49	I am often intuitive in my decision making in my chosen situation	49
50	I regularly use the phrase 'But, on the other hand ...'	50
51	I frequently need to ask for feedback from others	51
52	I go out of my way to meet a range of different people outside of my chosen situation	52
53	I love dreaming up new ideas with friends and work colleagues	53
54	I benefit from helping others achieve their goals	54

Now go to the next page to find out how to get your FREE* personalised report...



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To receive your analysis report add your name and e-mail address below (please write clearly so that this can be sent to you either by post or by email).

You will receive an analysis report and a validation statement asking you to judge how accurate your 'cognitive map' is for you at this time. Completion of the validation statement is vital for the ongoing development of this tool and the establishment of 'country-specific' norms.

Name:
(PRINT CLEARLY)

Organisation name:
(PRINT CLEARLY)

Country:

E-mail address:
(The above information must be completed in order to receive your report)

Now, if completed on paper, send it by post to: OFQT Ltd, c/o A. Wilson, Simpson Wreford & Co., Wellesley House, Duke of Wellington Avenue, Royal Arsenal, London. UK. SE18 6SS. Please make sure that you also send a large self-addressed envelope so that you can receive your report.

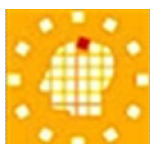
If completed on your computer in this Word document, save a completed copy to your computer then email this to skp@ofqt.com - a report will then be sent to you by email.



Validation Issues Induct a Basis
for Learning Evaluation



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ECLO, Belgium



VOFO, Norway



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