lilama
network Linguistic Policy for the Labour Market

Observatory of Good Practices

Benchmarking Method Guide

Education and Training

Education and Culture DG
Lifelong Learning Programme

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1. INTRODUCTION

1.1. LILAMA Network

Context

The world economy is changing rapidly, and the competitiveness of the EU economies is lagging in the global market. A Knowledge Society and Economy in Europe requires its human capital to continuously update its skills and competencies and to foster a mobility-enabling culture in order to remain competitive. Within this context, languages employability skills arise as a common priority shared by many EU Policies following the Lisbon Agenda: Education and Training 2010 Policy, European Employment Strategy, European Language Policy, and so on.

The impact on EU economies of the shortages of human resources skilled in foreign languages has not been thoroughly measured, but some research studies, such as ELAN1, show that a significant percentage of SMEs are losing export business opportunities through lack of language skills and, to a lesser degree, lack of intercultural skills. Foreign language skills are also closely related to the mobility of human resources needed for the development of a true knowledge-based economy, where knowledge and talents can freely commingle and co-operate. As a recommendation from this study, a focus on regions as the ultimate delivery agents for support measures in language skills for business is encouraged.

Notwithstanding, few EU regions or countries have developed a true Linguistic Policy oriented to regional economic strategies and business needs, and to the enhancement of the human resources of employability and mobility. Rather, current main efforts respond to the general provision of language training services, focused for the most part on English and forgetting the pre-eminence of other languages within the EU and from emerging economies. Generally speaking, language training policies are hardly planned and evaluated and they are not oriented towards the increase in competitiveness of the those regional economies field of at the international level.

[1] "ELAN - Effects on the European Union Economy of Shortages of Foreign Language Skills in Enterprise" Dec. 2006, by CILT, the UK National Center of Languages UK commissioned by the DG Education and Culture surveyed 2.000 EU companies, from which 11% reported business losses due to the lack of foreign language skills.

Moreover, the translation of the European Framework of Reference for Languages (ERFL, Council of Europe, 2002) to such Labour Market oriented Linguistic Policies still remains a challenge, as the ERFL is just being implemented within the formal education field. Studies on the potential role of the Framework as a clear referent on the design of such Linguistic Policies might lead to the optimisation of EU economies' investments on the foreign language training field.

The development of innovative such Linguistic Policies is relatively new in the EU context, and represents slow and complex processes requiring a constant update in order to respond to the rapid ongoing changes to the regional economies' profiles. Regions who are increasingly prioritising the need of Linguistic Policies closer to their economic and business needs face a lack of access to updated and relevant experience and policy recommendations that might guide their efforts.

LILAMA Network Mission

LILAMA Net has thus been formed as an answer to this EU priority, under the following strategic choices:

- **Mission:** To become a Mutual Learning Platform for the development of linguistic policies oriented to labour market needs. The focus is on the policy level, taking into consideration the potential agency role of public bodies for the design and implementation of such linguistic policies. Final beneficiaries of such policies will be language adult learners (Grundtvig) and VET students (LdV) in a globalised market economy, who will get to benefit from language training services tailored to the linguistic needs of their regional businesses, enhancing thus their employability.

- **Stakeholders:** It is formed by the partnership of 7 partners but with the goal, once the Network has produced specific and attractive outputs, of involving the widest level of key regional, national and EU stakeholders at policy level, which will broaden the number of positive experiences in the Net's topic and ensure the Net's sustainability.

- **Approach**: Its actions will revolve around 3 main axes:

  1) Observatory of Best Practises focussed on the Net's field topics.

2) Policy Research, for the delivery of policy recommendations on the design of such policies, and
3) Dissemination at the widest EU level of successful identified best practice, cases studies and policies.

Partnership

The LILAMA Network is co-financed by the European commission in the framework of the 2008 Call of the Lifelong Learning Programme, under Key Activity 2 Languages – Networks.

The LILAMA Network is originally composed of the following partners:

- Servicio Navarro de Empleo, Spain.
- Iniciativas Innovadoras S.A.L, Spain.
- Regional Language Network East , United Kingdom.
- Université Montesquieu-Bordeaux IV, France.
- Istituto per la Ricerca Sociale Società Cooperativa, Italia.
- Regione Basilicata – Dipartimento Formazione Lavoro Cultura e Sport, Italia.
- Vuxenutbildningsförvaltningen I Göteborg - The Adult Education Authority of Göteborg, Sweden.

Further information on the LILAMA Network, partnership and Best Practices is available at Network website: www.lilama.org

1.2. Benchmarking Method Goals.

The LILAMA Network's Observatory of Good Practice is aimed at the following goals:

- Identification of good practice at the EU level regarding the design and implementation of linguistic training policies oriented to the labour market needs.
- Dissemination and exchange of experience identified.
- Development of a practical guide to help future regions with the identification and prioritisation of good practice in the development of linguistic training for the employment aligned with their policies and instruments in a regional/national context.

To that end the proposed Benchmarking exercise has to be based on a unified analysis process that will ensure a unique focus of gathering and collecting data as well as an indicator analysis. The process will assure that the good practices identified will be analysed on a "transfer" basis, that is, Benchmarking Criteria that will allow to assess the **quality** of the studied cases and their **transferability**.

This Guide focuses on the delivery of a sound method for the identification, evaluation and validations of good practice that will be published and disseminated by the Observatory of Best Practices of the Network. This guide is aimed at Network Agents, defined as "people who carry out a number of specific roles including selecting, analysing and validating projects as best practice, according to the LILAMA organisational structure") with comprehensive detail about the agreed method.

Finally, a Guide of Best Practices will be elaborated and disseminated it by the end of 2010, including those policies evaluated by the Network as the best amongst those analysed.

1.3. Good Practice Definition

Concerning the scope of the benchmarking, following the consent of the LILAMA Network members, it has been agreed to distinguish 3 categories of good practice to be identified:

- **Good Practice in general Policies and Programmes that include language training aimed at labour market needs.**

- **Good Practice in Language Training Policies.**

- **Good Practice in Training initiatives.**

Each one of these have different criteria which need to be addressed. A policy which is strong may be weak on implementation, and a training project which is strong may be weak in terms of regional linkages. Equally, the questions which need to be asked to identify whether training is effective are different from those we need to ask to determine whether a policy is effective.

Some regions have programmes which have a language training component, hence we need to distinguish between the overall programme (which may be good) and the language training component (which may be bad), or vice-versa. This is reflected in the 3 corresponding versions of the proposed Evaluation Grid, namely general policy including a focus on language & culture, language policy, and training.

While it may be useful and more pragmatic as a working procedure to clearly distinguish between 'best training practice' and 'policy' criteria as two separate areas, best training practice should ultimately follow on from the right policies in the first place if both are to be benchmarked. There should be coherence in joining them up so that the logic of tying in actions emanating from solutions can be seen from empirical observation.

Thus, the Observer proposing the element of best practice in policy or the proposed training needs to let Analysts (the other partners) know whether it is policy or training which is being considered.

Potential Good Practices will be assessed following 2 criteria:

- **Quality Assessment**: according to the benchmarking criteria defined for target Good Practices: general policy, language training policy and training initiative.

- **Transferability assessment**: according to a general set of transferability criteria.

The resulting assessment and evaluation of potential good practice will allow us to characterise the good practice as such, according to agreed criteria, as well as its potential transferability. The Good Practice label will be dependent on the Quality Assessment. Additionally, the transferability criteria will provide valuable information on its chances on being successfully transferred or mainstreamed.

The definition and criteria for the benchmarking process are described in the following sections.

1.3.1. Definition and Quality Assessment of General and Language Policy

The implementation of public support for language training depends on both clearly-defined policy, logical strategic development and effective delivery. Under the Policy field we can distinguish 2 levels which share the same quality benchmarking criteria:

- **General Policies or Programmes** that partially address the language business training topic as part of their approach, usually linked to regional or local economic development strategies.

- **Language training policies** which specifically focus on the field of business and language.

Considering the European scope of LILAMA, good practice in language policy-making should be grounded in overall EU policy making as set since the advent of the Lisbon strategy (the aim of which is “making [European] education and training systems a world quality reference by 2010”).[2]

[2] Presidency Conclusions, Barcelona, paragraph 43.

Thus, what may seem good practice in a given country may not be considered as such by LILAMA if the objectives of the policy works against one or several EU strategic objectives, for example by cutting public expenditure at the expense of lifelong learning.

For instance, merely providing supervisory staff in prisons with survival kits of words in inmates' native languages to cut on oversubscribed classes of the national language for inmates will not be deemed good practice as this

1) leads to lower lifelong learning participation (higher lifelong learning participation being an EU benchmark).

2) is not inclusive, as it could be used as an excuse to ignore the equal priority for migrants to have access to learning of the 'host-language,' the language of the host country.

Definition of Good Practice on Policy (either a general or a language policy one) will be related to the following **7 Benchmarking Criteria**.

Policy Good Practice Criteria

1. Reflects current EU and regional policy on multilingualism.

2. Includes incentives to enhance & sustain language learner motivation & employment.

3. Reflects regional strategy for employability and intercultural benefits.

4. Addresses local language minority and migrant community language resources.

5. Provides for international networking and/or mobility.

6. Incorporates the European Qualifications Framework (EQF) with transparent validation/ credits.

7. Can be readily and usefully implemented.

1. Reflects current EU and regional policy on multilingualism.

As part of the Lisbon strategy, the EU seeks to encourage lifelong learning at all ages, from pre-primary to post-retirement. Thus, the number of people and percentage of the working population in training should increase. The learning of languages should be made easier formally and institutionally, and also informally. Provisions should be made to increase access to language training to a variety of citizens in term of gender, language, age and qualification. Validation of the informal learning of languages should be encouraged.

Access to language education at universities and VET institutions after validation of informal language learning should be eased. International mobility as part of language training should be encouraged for people in employment. Increasing investment in language training and in innovation in language training should be encouraged. Surveys of the ELAN-type at local level should be conducted to produce facts and figures to convince private companies, stakeholders in general and public authorities of the importance of language learning in business.

Policy must address lifelong learning relating to contextualised employment needs. Some policies may limit the breadth of the training foresees on one language or sector, and therefore all limitations need to be clearly defined, with justification for their inclusion outlined.

In fact, policy must address one or more of the following:

- promotes a wider knowledge and use of all languages throughout the Union
- promotes lifelong learning and learner mobility
- seeks to improve the quality and efficiency of provisions and outcomes
- ensures the provision of the necessary skills and qualifications for the world of work

In order to ensure the assessment of the Good Practice, relevant information on the following topics should be taken into consideration:

- which economic priority is driving the policy.
- which organisations are targeted for implementation of programmes.
- which organisations are instrumental for oversight of implementation of the policy.

- the extent to which it is driven by employer representation.
- whether it is long-term or short-term.
- whether it is sector-driven and, if so, which sectors.
- impact of the programme.

2. Includes incentives to enhance & sustain language learner motivation & employment.

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Thus, policy must address and provide information on how outcomes for current employment context are clearly identified & responded to. Business support policies work best when they respond to concrete and defined employer need; this ensures both take-up by employers within programmes and best use of public resource. Specific surveys of employer needs and targeting of priority sector companies should be encouraged.

Language needs and language-learning needs are not just to be decided on by individuals in company senior management who may or may not be accurately or usefully informed. Which languages and how training is delivered are questions which need data (observation, information) and experts at the table for negotiation.

Languages aimed at 'employability' should be the real concern, not languages as decided by employers alone.

A policy which supports the needs of employers of SMEs (Small & Medium-sized Enterprises) can not reflect the needs of the larger employers, therefore policy can still be deemed 'best practice' if its target audience is well-defined and its limitations made clear. A policy which responds to government targets which do not coincide fully with business reality can not be classed as 'best practice'.

To be counted as 'best practice' the policy would need to demonstrate how it identified overall company staff training needs. This is different from the detailed academic analysis required to inform specific courses of training. The policy would need to demonstrate that there is a facility to capture data on the business need for the training. An element of good practice could be the use of business-facing cluster brokers to ensure that needs are identified. For example, there may be regular interaction between life science businesses and the life science membership organisation ABC, the regional employer cluster. The training manager of ABC will know the generic training needs of this sector and should be involved in implementing policy.

SMEs should be helped to invest in human resource to help them improve their competitiveness and performance and gain access to the world market. Migrants are a valuable language source. Those with multilingual competencies can help establish business contact abroad and assist in export. They could also play an active role in integration programmes for recent immigrants. Enhancing motivation to learn languages is key, not just for taking up a new language but also for sustaining learning. People should have incentives to learn languages and be encouraged to develop their language profiles. Local and regional language learning networks, comprising many providers and collaborating at European level, should be encouraged. SMEs should be rewarded for the management of language skills, and incentives for staff to acquire language skills should be in place.

Some policies are difficult to enforce as they are either not realistic to deliver or are based on historical out-of-date data; a policy needs to lead to programmes which can be delivered efficiently given planned resources, and it needs to take into consideration the views of parties 'on the ground'.

Policy needs to identify how it has captured data ‘on the ground’ to inform its development and how implementation can ensure that this reality is reflected. Policy should allow for the cost of information campaigns on the value of the economic and cognitive benefits attached to language learning, and should promote the development of successful strategies for initiating and sustaining learner motivation.

For example, policy may state that public funds will be used to fully finance training in exchange for employers contributing staff time in match through attendance at daytime training. This, however, may mean that many employers cannot put staff forward for training if they cannot attend regular daytime training sessions. Equally, policy which indicates high targets, such as number of employers to be trained, may be sacrificing quality of training for achievement of high numbers of employers, leading to a culture of ‘box ticking’ and short-term training rather than a focus on longer-term training for a smaller & more realistic number of employers.

Thus policy should have identified messages used to convey the benefits of possessing language & culture skills and how these messages are delivered (channels, timing, measuring of impact). This can include the following:

- Details of specific incentives to encourage uptake of language learning
- Information campaigns on language-learning benefits
- Channels to be used to deliver messages
- Awards and other recognition of investment in language training
- Details of any planned informal learning contexts
- Development of ‘edutainment’ programmes which encourage interest in other languages & cultures
- The role of media-delivered messaging (TV, audio, newspaper)
- Use of web-based channels for promotion of benefits of acquiring language skills
- Envisaged impact of any promotional campaigns

3. Reflects regional strategy for employability and intercultural benefits.

A policy which considers the agreed economic priorities of the region as outlined in strategy documentation; one which ‘goes it alone’ may not get the support of stakeholders or attract public funding. There is frequently pressure on public bodies to cut budgets or prioritise funding, which means that some programmes cannot be funded. Policy therefore needs to ensure that any support for language & culture training specifies which regional economic priorities it addresses.

For example, a policy may clarify that public funding for language & culture training for business should be focussed on priority sectors, with these sectors listed. To be counted as ‘good practice’ therefore it should also explain how businesses in these sectors are to be targeted as well as the alternatives (should they exist) for businesses falling outside these sectors.

Policy should make reference to identifiable strategic documents, in particular those which are widely known in the region by key stakeholders, such as the RES (Regional Economic Strategy). Policy should also encourage collaboration rather than competition with other European regions. Policy should encourage information campaigns on the benefits of language-learning and should support the business management of language resources. In terms of the employment of migrant workers, it should encourage the identification of host-language learning strategies.

Thus, policy needs to reflect the extent to which the language policy builds on overall regional policy and the level of expected response to current regional priorities.

- Extent of support for small and medium-sized enterprises.
- Planned surveys of employer need, including details of questions to be asked and information targeted.
- Plans for response to employer need as assessed based on results of survey
- Whether language-related skills are included on career-related surveys.
- Whether a diverse range of languages is foreseen, and which languages are seen as a priority.
- Whether funding or similar support for language training is an output of the policy
- Use of Europass or similar benchmarks to confirm language ability.
- Development of resources for careers advisors and business skills brokers highlighting the benefits of language & culture skills.

4. Addresses local language minority and migrant community language resources.

Policy should include data on the extent to which the resources offered by migrant communities can be utilised to assure economic growth (particularly in relation to international trade) and greater intercultural understanding. The following topics might be assessed:

- Details of envisaged minority language literacy programmes
- Evidence of use of migrant resource to support export strategies
- Financial support offered to migrant communities in the learning of languages of the host community
- Details of language training programmes for migrant communities and the levels of competence at which these are targetted
- Integration of children of migrant workers in mainstream education and how language support is offered

- Details of enhance migrants' motivation to learn the language of the host community, and other languages

Details of how citizens of the host country can be encouraged to appreciate the culture of a given migrant community to the extent that they become motivated to learn the language of that community.

5. Provides for international networking and/or mobility.

Regarding the language content of the policy, it might complement classroom-based language training by periods of learning in a country of the target language and through elements of distance learning. The following topics might be addressed:

- How periods of training in target language country are to be embedded within recommended programmes.
- Recommended length of time spent abroad.
- Financing of time spent abroad.
- Organisation of mobilities: work experience, home stay, organised training, supervision by sending organisation.

- Details of grants available for time spent abroad.
- Details of established regional networks.
- Details of established international networks.
- Organisations responsible for development of networks.
- Purpose & scope of networks.

6. Incorporates the European Qualifications Framework (EQF) with transparent validation/ credits.

Policy should include details of whether qualifications are an output of the programmes developed as a result of the policy. Where it does not make reference to the European Qualifications Framework (EQF) details of credit and other qualifications-related systems and transparent levels for target qualifications should be provided. The following topics might be addressed:

- Levels of target qualifications.
- Awarding bodies.
- Details of internal credit systems (if used).
- Links to the EQF.
- Recognition of competencies & qualifications.
- Credit transfer systems.
- Validation of informal learning.

7. Can be readily and usefully implemented.

Some policies are difficult to enforce as they are either not realistic to deliver or are based on historical out-of-date data; a policy needs to lead to programmes which can be delivered efficiently given planned resources, and it needs to take into consideration the views of parties ‘on the ground’.

Policy needs to identify how it has captured data ‘on the ground’ to inform its development and how implementation can ensure that this reality is reflected. Policy should allow for the cost of information campaigns on the value of the economic and cognitive benefits attached to language learning, and should promote the development of successful strategies for initiating and sustaining learner motivation.

For example, policy may state that public funds will be used to fully finance training in exchange for employers contributing staff time in match through attendance at daytime training. This, however, may mean that many employers cannot put staff forward for training if they cannot attend regular daytime training sessions. Equally, policy which indicates high targets, such as number of employers to be trained, may be sacrificing quality of training for achievement of high numbers of employers, leading to a culture of ‘box ticking’ and short-term training rather than a focus on longer-term training for a smaller & more realistic number of employers.

By this is meant the continuation of project results beyond the shelf life of a particular programme or project; many programmes rely on continued public support and are not sustainable over long periods. It should also clearly indicate how the transfer from public funding to private funding should be managed, and the percentage of contribution to be made by the employer.

Language training by its nature is not modular but linear, and it can take several months or years to achieve the desired level of competence. Policy needs to show how it manages this and how it expects funds to be allocated to a balance of short-term and longer-term training.

For example, a policy which focuses on the participation of a high number of beneficiary company employees may encourage implementers to run a larger number of short-term courses which may not reflect the longer-term needs of the employees. This may result in successful participation by the employer (measured by the number of employers taking part) but may lead to consistently incomplete training.

Policy should encourage the establishment of regional language learning networks. It should also include languages and language-related skills on career tracking surveys and questionnaires. Furthermore, it should diversify language training offers beyond those traditionally promoted to include non-European languages. Resources for career advisors highlighting the added value of language skills in employability should be developed.

The current definition of good practice in policy making is based in large part on the following:

- Communication from the commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the regions, an updated strategic framework for European cooperation in education and training (dated 16/12/2008), http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF

- The Final report of the High Level Group on Multilingualism, http://ec.europa.eu/education/policies/lang/doc/multishort_en.pdf

- Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the regions. Multilingualism: an asset for Europe and a shared commitment. An inventory of community actions in the field of multilingualism and results of the online public consultation. http://ec.europa.eu/education/languages/pdf/com/inventory_en.pdf

- Recommendation of the European Parliament and of the Council (April 2008) on the establishment of the European Qualifications Framework for lifelong learning, 23/4/2008, http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF

- Declaration of the European Ministers of Vocational Education and Training, and the European Commission, convened in Copenhagen on 29 and 30 November 2002, on enhanced European cooperation in vocational education and training, "The Copenhagen Declaration", http://ec.europa.eu/education/lifelong-learning-policy/doc/policy/copenhagen_en.pdf

1.3.2. Definition and Quality assessment of Training Good Practice

Good implementation of training encompasses a complete analysis based on scientific criteria, competent delivery of training and the use of retroaction to improve training. This is delivered by trainers with a sufficient degree of expertise in a realistic managerial framework. The latter should incorporate sustainability.

If unrealistic resources in training time or trainer's expertise are allocated, or if training is based on wrong didactic assumptions, then training cannot be deemed good.

Definition of Good Practice on Training will be related to the following **6 Benchmarking Criteria.**

Training Good Practice Criteria

1.	It is based upon a complete and up-to-date needs analysis.
1.	It is focused on the acquisition of competencies identified on needs analysis.
2.	Its objectives are realistic.
3.	It is based on an updated didactic framework
4.	It incorporates some element of retroaction
5.	It takes into account a maximal number of constraints: absence, diversity, time and place

1. The needs analysis is based on a complete, up-to-date conceptual framework.

The needs analysis cannot rely just on compiling employers and/or employees' perception of their needs. It requires questioning employees and possibly employers on the competencies that need improving based on the CEFRL and the level at which these competencies are expected. It also requires collecting samples of input (recordings, letters, brochures, etc.) relevant to the training needs and possibly output by prospective trainees.

Analysis is carried out in terms of discourse domain, topic, type, register, length, vocabulary, grammar, speed, accent, clarity of articulation, etc..

Needs analysis necessarily takes into account general or specific target language (or L2) difficulties or priorities arising out of the trainee's acquired skills and/or weaknesses in their mother language(s) (or L1). As new language competency depends on the trainee's previous language experience, target L2 priorities and training pathways from L1 to L2 will be inter-related and require specifying.

2. **Training is focused on the acquisition of the needed competencies identified through the needs analysis.**

It is based on the linguistic traits identified in the discursive genre analysis carried out in needs analysis. This implies that seeking validation through external language certifications may not always be a valid training objective unless proven that the construct of the certificate and the detailed needs analysis coincide.

Training material incorporates as many appropriate documents collected in the analysis conducted as possible, and will have priority over general-purpose material.

3. **Training objectives are realistic within the timeframe.**

This takes into account that both the initial and the target level of trainees in the language/culture be considered along with the number and frequency of training sessions. Some competencies, especially at higher levels, may take time to acquire. Objectives must be attainable within the specified timeframe.

4. **Training is based on an updated didactic framework.**

Trainers have been provided with adequate didactic training. Trainers are offered in-service training options based on the latest research. Time constraints are properly dealt with for trainers too. Some time is provided for them to check on trainees' work, comment on it, using online learning management systems if they wish.

Trainers are autonomous in deciding on suitable learning methods and can use their own learning material, not sticking to a recommended book or method if they found consider it to be unfit for that purpose. They have enough time to create their own learning material if needed.

5. **Training incorporates some element of retroaction.**

Employers and trainees may have misconceptions about learning based on their previous language experience and culture and about the target language and culture. Therefore, it is not desirable to ground training only on their needs as perceived by them only. For instance, they tend to overrate the importance of grammar and vocabulary and play down that of phonology, irrespective of the actual needs in their work position. Their expressed needs may also be rooted in an experience of language learning informed by personal feelings and memories and not by up-to-date knowledge of language acquisition processes.

Retroaction is particularly important to check whether issues of diversity and personal constraints are dealt with. It also allows to have some feedback on trainees' motivation and modify training accordingly. It may be formal (paper or online questionnaires) or informal (oral). It may take place at the end of the training or both in the course of the training and at the end.

6. Training takes into account a maximal number of constraints: absence, diversity, time and place.

Trainees' diversity in terms of culture, level, gender, learning style, is taken into account. Using a language portfolio, either paper or web-based, to liaise with learners may give better indication of learners' linguistic and cultural profiles and of their learning styles.

To deal with absenteeism due to colliding schedules, illnesses and diversity, asynchronous learning environments may be an option. Training may offer access to an online LMS (learning management system) such as Moodle or Dokeos, which allows to upload, view and download learning material, either written, audio or video. LMS may also provide some form of retroaction (motivation). Trainers may check on learners' achievements and comment on them.

1.3.3. Definition of Transferability Criteria

Transferability Criteria agreed are the following:

Transferability Criteria

1.	Evidence of Transfer.
2.	Innovation.
3.	Dependence on political context
4.	Flexibility
5.	Multi-region transfer

1. Evidence of transfer.

This criteria assesses if a given policy or training has already been transferred to other places or sectors. If such transfer has taken place its evaluation can provide valuable information on the key transferability factors of such an approach. To that end the following information is to be compiled and assessed.

- Instances of transfer of elements of the policy or the policy as a whole.
- An indication of any adaptations that had to be made at the receiving end to provide appropriate fit with the objectives of the recipient organisation or geographical territory.
- A brief description of how the recipient identified the policy or training in the first instance.
- Key issues that arose out of discussions relating to its transfer.

2. Innovation.

A policy or training can be very innovative and therefore it has not yet been transferred. We may consider then such a policy or training programme with a low transferability due to lack of evidence of existing transfer, but we can also consider it as new and therefore be ‘early days’ for transfer. Where it is deemed as innovative, it should be recognised as worth of transfer, but its transferability assessment needs to be reflected in its evaluation.

Innovation by definition is the breaking of new ground, and it may therefore be premature in some circumstances to expect transfer. Where a policy or training programme is deemed innovative, this can be scored positively on the transferability grid if there are no evident time-bound or circumstance-bound elements to limit its transfer. To that end assessment and evaluation should tackle the following topics:

- An explanation of the innovative approach or content.
- Barriers to potential transfer.

- Likely timescales to be ready for transfer.
- The degree of adaptation required for transfer, and whether this is deemed excessive.
- The degree to which it is limited by current context.

3. Dependence on political context.

Transferability might depend on specific assumptions relating to political context. Some policies may make assumptions regarding the political drivers behind them, particularly in relation to European policy.

Where policy refers to European structural funds or other EU finance, transferability may be limited to eligible territories or classification of beneficiary. Equally, differing approaches by regional government to business support may be an influencing factor.

For example, one country may operate a system of tax-deductable training credits which would not be available in another country. One region may receive a larger proportion of national ESF grant for management training whereas the recipient region may not possess the same levels of subsidy. In one country there may be a history of government subsidy whereas in the recipient territory employers may be expected to cover the cost of training without recourse to public funds.

Therefore Transferability assessment should revolve around the following topics:

- Whether political drivers are specifically region-focussed and do not reflect the general political environment of potential transfer markets.
- Whether it is based on EU structural funds or other EU finance.
- Whether there are limits to the type of beneficiary.
- Whether the business support context it is based upon is not restricted in such a way that a transfer country could support the policy or programme (i.e.: it is built solely on certain structural assumptions that are unique to that particular country).
- The degree of flexibility in the employer-government arrangement of support (financial or otherwise) which would not restrict its transfer to other regions (e.g.: if it can only work if based on a system of tax training credits, this could only logically be transferred to a region with similar arrangements).

4. Flexibility

Flexibility is a factor directly linked to transferability. A policy or training programme which has been developed within a specific regional context may be adapted to allow transfer to another territory. An indication of the degree of necessary adaptation needs to be ascertained as well as an evaluation of whether it is sufficiently flexible to be adapted. One programme may be also be transferable across sectors.

5. Multi-region transfer

Does the policy or programme allow for multi-regional transfer? A successful policy or programme may be deliverable on a pan-regional basis on the strength of a global or European partnership. This will allow for the effective exchange of expertise and resource and encourage international collaboration.

The delivery of multi-region transfer will permit delivery to a broader range of beneficiaries and allow evaluation of reactions to delivery influenced by cultural differences. It encourages mobility, as programme managers become involved in exchange and observation.

Transferability assessment will revolve around the following topics:

- Can it be transferred to any global region?
- Can it be transferred to any region within the EU?
- Can it be transferred to a limited number of regions within the EU?
- Is the transfer limited to national boundaries?
- Is the transfer limited across sectors or target audiences within one region?
- Is it transferable to multiple regions as part of larger network?
- To what extent does the target sector or audience limit multi-region transfer?

2. METHOD

2.1. Overall Method

There are two core elements to the LILAMA Observatory Of Best Practices that differentiate it from many other observatories or databases of best practice projects:

1. The Method.

The Method has been designed by the LILAMA partnership in order to ensure a consistent approach to the analysis and inclusion of policies in the Best Practice Observatory.

The Method facilitates the collection of relevant information about any policy, programme or training initiative in the field of language and business, and presents that information in a format that enables all best practices to be analysed easily and consistently based upon their Quality and Transferability. The Method is outlined in detail in Section 2.2.

2. Agents involved.

Four different types of Agents have been identified as necessary to ensure a consistent approach to the identification, assessment and agreement of policies in the Observatory. The basic roles of these agents are as follows:

- **Observer** - identifies potential Good Practices, completes the Good Practice Dossier File and submits the file to agreed Analysts for its assessment.
- **Analyst** - uses the Method and evaluation grid to analyse each policy submitted by the Observer. According the Work Process defined in Section 2.3, a policy must be analysed by 3 analysts.
- **Mediator** - will only be required in the event of a conflict or disagreement between the assessment outcomes of Analysts on a particular policy.

- **Validator** - will carry out random checks that the Method has been correctly applied and will publish the Best Practices assessed as such on the Observatory.

A more detailed description of the roles of the four agents is contained in Section 2.3.

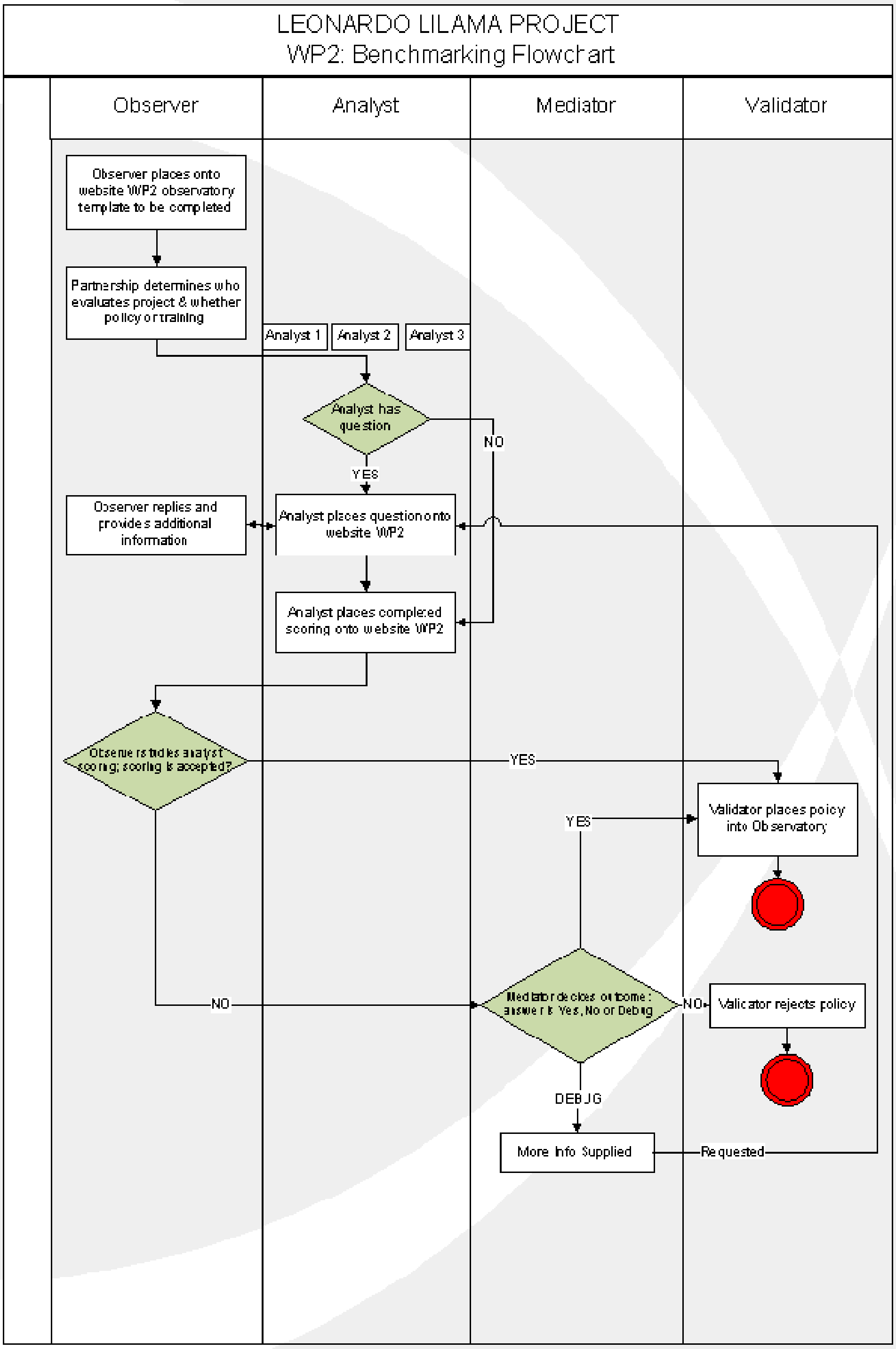
2.2. Method Work Process

The Method work process consists of a number of steps or phases involved in analysing, evaluating and validating a policy or training as a Good Practice, once it has been detected as a likely study case, in accordance with the LILAMA parameters. Each stage is carried out by different agents: Observer, Analysts, Mediator and Validator.

The Benchmarking Method agreed by LILAMA Network members is split into 3 stages, and 7 steps, described in the following sections:

Stage	Steps	Agents involved
1. Identification Of Good Practices	Search and identification of Good Practices.	Observer
	Good Practice study.	
2. Evaluation of Good Practices	Assessment of Good Practice.	Analysts
	Evaluation of Good Practice.	
3. Validation of Good Practice	Agreement on evaluation.	Observer / Analysts / Mediator
	Method check of the process.	Validator
	Good Practice publishing.	

The following Flowchart shows the process by which a Good Practice will be considered for inclusion in the Observatory.


LEONARDO LILAMA PROJECT
WP2: Benchmarking Flowchart
Observer
Analyst
Mediator
Validator
Observer places onto website WP2 observatory template to be completed
Partnership determines who evaluates project & whether policy or training
Analyst 1
Analyst 2
Analyst 3
Analyst has question
NO
YES
Observer replies and provides additional information
Analyst places question onto website WP2
Analyst places completed scoring onto website WP2
YES
Validator places policy into Observatory
YES
NO
NO
Validator rejects policy
DEBUG
More Info Supplied
Requested

2.2.1. Stage 1. Identification of Good Practices.

Stage 1 is designed to be completed by the Observers. It focuses on the identification of potential Good Practices and the collection of all necessary information in order to assess the given policy on the second stage. To that end, the method comprises 2 steps:

Step1. Search and identification of Good Practice.
Step 2. Good Practice study.

<u>Step1. Search and identification of Good Practice.</u>

The LILAMA Network plans to publish on the Observatory of Best Practices at least **60 Good Practices**. To that end, all members have to equally get involved, as Observers, on an active and on going search of potential Good Practices.

In order to remain effective and reach this goal, the minimum number of good practices to be identified by each member has been calculated within the LILAMA project framework. In **Annex 1** the **schedule of Best Practices** to be identified by partner on a monthly basis is described.

		Minimum N° of Good Practices to propose as Observers		
N°	Partner	2009 Target	2010 Target	Total
1	Servicio Navarro de Empleo	3	6	9
2	Iniciativas Innovadoras	2	4	6
3	Regional Languages Network-East	6	6	12
4	Universite Montesquieu Bordeaux	3	6	9
5	Istituto Ricerca Sociale	2	5	7
6	Regione Basilicata	2	5	7
7	Adult Education Authority of Göteborg	3	7	10
		21	**39**	**60**

Language and business policies and training experiences from **all over Europe and other non-EU countries** are eligible and prone to be studied by LILAMA. In order to identify such potential good practices, each member is free to use its knowledge, contacts and previous experience in the field for the proposal of potential good practices.

Nonetheless, in order to avoid the duplication of efforts, a geographical distribution on the countries and regions to be assessed has been agreed.

Nº	Partner	Home Country	EU Countries	Non-EU countries
1	Servicio Navarro de Empleo	Spain	Portugal, Greece, Malta, Cyprus	Canada
2	Iniciativas Innovadoras	Spain	Poland, Hungary, Czek Republick, Slovakia	
3	Regional Languages Network-East	United Kingdom	Ireland, Germany	USA, China
4	Universite Montesquieu Bordeaux	France	Austria, Belgium, Luxembourg	Australia
5	Istituto Ricerca Sociale	North Italy	Latvia, Lithuania, Estonia	
6	Regione Basilicata	South Italy	Romania, Bulgaria, Slovenia	
7	Adult Education Authority of Göteborg	Sweden	Norway, Finland, Danemark	Japan

Additionally, the following sources of information are suggested:

- ADAM Project database.
- Lifelong Learning Projects compendia.
- European Social Fund projects compendia.
- Language Departments at regional and national Universities.
- Regional Brussels Offices.

Step 2. Good Practice study.

Once Observers have identified a potential good practice, they will complete a **Good Practice Dossier File,** a template where all relevant information needed for the assessment of the benchmarking criteria can be described.

Observers need to make a distinction between **general policy, language training policy and a training** component/project. Observers will have to use the corresponding **Dossier File and Evaluation Grid** depending on the contents and scope of the identified good practice.

The Observer will have to complete the tables of the appropriate dossier file. Observers need to ensure that sufficient detail has been included for Analysts to give an educated and informed score on the evaluation grid.

One policy or programme may contain several items of practice. These need to be clearly identified so that the Network can determine if they can be accepted. When so, you will need to make sure that in the evaluation grid you have identified which items of best practice are being evaluated.

Templates for the completion of the **Dossier File** according to the content of the good practice are attached in **Annex 2**. The information to be gathered on each dossier file will depend on the kind of good practice addressed, but this information will be related to the benchmarking criteria allowing its assessment, as well as the transferability of the good practice.

Once the Observer has completed the dossier file, it will complete the corresponding **Evaluation Grid**, taking into consideration if it is a general policy supporting language training, a language-specific policy or a training initiative. **3 different Evaluation Grids** exist, one for each type of good practice subject of study. Templates are available in **Annex 3**. Each evaluation grid will be composed of 2 parts, one referring to the evaluation of the quality of the good practice and another one referring to its transferability.

Two different versions of each evaluation grid will exist, one to be used by Observers and one to be used by Analysts. The former will just have one column where Analysts can score the policy following the evaluation criteria, while the latter will allow to consolidate the scoring conducted by the Observer and the 3 Analysts and come up wit the average score of the Good Practice.

Evaluation will take place on the quality and transferability of the good practice. To that end the Observer will have to score both aspects, following a pre-determined set of quality and transferability criteria. The latter will be the same, independent of the kind of good practice evaluated; the former will be evaluated according to a different set of criteria depending of the nature of the good practice: general policy, language policy or training. Thus, Observers will score from 0 to 10 the quality and transferability of the assessed good practice vis-à-vis each of the benchmarking criteria.

For each benchmarking criteria 4 different levels of fulfilment of the criteria will be described in order to ease the Analyst's scoring.

Once the Observer has completed the corresponding dossier file and evaluation grid, it will deliver the Dossier File and a blank Analyst Evaluation Grid template to the appointed 3 analysts by email.

The Observer will reference the dossier file and the blank evaluation grid following this criteria: PPYYNN.

- PP: Partner Nº of the Observer; from 01 to 06.
- YY: Year; from 09 to 11.
- NN: Number of Good Practise proposed by Observer; from 01 to 15.

For example, the first Good Practice Dossier proposed by the Lead Partner as Observer, will have the following reference: **GPD_010901** and the Evaluation Grid of such Good Practice will have the following reference: **GPE_010901.**

2.2.2. Stage 2. Evaluation of Good Practices.

Stage 2 is designed to be completed by the Analysts. It focuses on the assessment and evaluation of good practice identified by Observers. To that end, the method comprises 2 steps:

Step 3. Assessment of Good Practice.
Step 4. Evaluation of Good Practice.

Step 3. Assessment of Good Practice.

All good practices will be assessed by 3 different Analysts, partners of the Network. A table with the organisation of such assessment has already been agreed and is enclosed in **Annex 1,** so all partners get to plan their workload on a monthly basis.

Thus, all partners, as Observers, get to know who will assess the good practices it has identified, and as Analysts, they get to know whose good practices they are supposed to asses.

The assessment of the policy or training initiative will be carried out by the analysis of the dossier file compiled by the Observer. Analysts will have **15 days** from the publication of the dossier file on the Intranet to complete the assessment and to deliver the evaluation grid of the good practice scored.

If following such analysis, the Analyst has further questions of remarks on the contents of the dossier file it can place such questions to the Observer, who will reply with the information available.

Additionally, and coincident with the organisation of the programmed Network's field study visits, all partners will get to assess and evaluate the policies and training visited. Such field study visits will allow the first hand and joint evaluation of host region good practices by all Network members.

Step 4. Evaluation of the Good Practice.

Once the assessment is completed, Analysts will complete the corresponding **Analyst Evaluation Grid**, scoring from 0 to 10 the quality and transferability of the assessed good practice vis-à-vis each of the Benchmarking criteria.

For each benchmarking criteria 4 different levels of fulfilment of the criteria will be described in order to ease the Analysts scoring.

3 different Evaluation Grids exists, one for each kind of good practice subject of study. Templates are available at **Annex 3**. Each evaluation grid will be composed of 2 parts, one referred to the evaluation of the quality of the good practice and another one referred to its transferability.

Once the evaluation grid is completed by Analysts they will deliver it to the Observer by email for registering the score. Once 3 Analysts have completed the evaluation grid the Observer will get to calculate the average score, calculated over 100, and determine if the proposed good practice can assessed as such from the quality and transferability point of view. The general criteria is for a policy or training experience to reach an average score of **50 plus**, in order to be considered a Good Practice and as a transferable one.

Additionally, a colour legend will be used in order to graphically identify the average score of evaluated good practices.

Balanced Scorecard

90-100	Gold
60-89	Blue
50-59	Green
30-39	Amber
0-29	Red

To that end the Observer will use the Observer version of the Evaluation Grids.

2.2.3. Stage 3. Validation of Good Practice.

Stage 3 is designed to be conducted by Observers, Mediators and Validator. It focuses on the agreement and validation of policies evaluated as Good Practice. To that end, the method comprises 3 steps:

Step 5. Agreement on evaluation.
Step 6. Method check of the process
Step 7. Good Practice publishing.

Step 5. Agreement on evaluation.

Observers will analyse the completed evaluation grids of the potential good practices they have proposed. Two outcomes might arise from this analysis:

- If the Observer agrees with resulting score of the quality, and it has a 50 + score, the policy or training can be labelled as a Good Practice. To that end, the Observer will confirm to the Validator the overall evaluation of the good practice, delivering both the Dossier File and resulting consolidated Observer Evaluation Grid by email.

- If the Observer does not agree with the overall score (under 50 +) or with any of the scores provided by the Analysts (under 50 +), the good practice is placed on hold and delivered to the Mediator, who will study the dossier file, evaluation grids and negotiate with the Observer and Analysts an unequivocal assessment of the policy or training. Three possible outcomes might arise from this negotiation:

  - If Observer and Analysts agree on the studied case as a Good Practice, the Good Practice will be delivered to the Validator.

  - If Observer and Analysts agree that the studied case can not be considered a Good Practice, the Mediator will deliver this information to the Validator who will reject the studied case.

  - If an agreement cannot be reached, the process is debugged. The reasons why the studied case does not comply with the evaluation parameters will be studied. If there is not enough information to analyse the project, more information will be requested from the responsible Observer, who will add it to the dossier file, and the analysis process will re-start at Stage 2.

A Mediation role will be conducted by the Steering Committee. Thus, at all consortium meetings a specific time will be devoted to the mediation on non agreeable evaluation of good practice.

Step 6. Method check of the process.

The Validator will get either from the Observer or from the Mediator the decision on the Good Practice assessment.

The Validator will check that the Method is being / has been correctly applied to experiences that have been submitted as a Good Practice, completing a Check List, attached on **Annex 4**. The Validator will verify:

- that the Observer has completed the dossier file properly for each good practice.

- that the Analysts have applied the method correctly.
- Whether or not there was agreement between the Analysts on any particular project
- Whether the Analysts have input the data to the online system.

If the Check List gives a positive outcome, and the results are acceptable, the Validator can then proceed to validate the project as a Good Practice. Validator will also communicate periodically to the partnership which Good Practices have been validated.

If any of the items on the Check List are negative, the Validator has a choice of either speaking to the Agent concerned or ruling that the project cannot be considered any further.

Step 7. Good Practice publishing.

Once a good practice is validated as such, and the method check has been positively conducted, the Validator will publish the information in the dossier file on the Observatory of Best Practices website (www.lilama.org).

Good Practices on the Observatory will be searchable under the following fields:

- Type of Good Practice: General Policy, Language Policy , Training.
- Country of origin.
- Type of Promoter: Public Administration / Language Training Provider / Company.

The complete dossier file and an executive summary of each good practice will be available. The quality and transferability scores of validated and published good practices will allow to elaborate a ranking of good practices according to the quality and transferability criteria. Such a ranking will be available on the Observatory of Best Practices website.

2.3. Agents: definition and roles.

Within the LILAMA Network, Agents are people who carry out specific roles including selecting, analysing and validating policies as Good Practices.

4 main roles have been identified:

- **Observer.**
- **Analyst.**
- **Mediator.**
- **Validator.**

The coordinated work of these roles allows the identification, analysis and validation of Best Practices. The role of the Agents in each of these four phases is outlined below.

- **Observer**

- All partners will be Observers, identifying good practices in the target policy field.

- Partners can additionally rely on internal and external Observers for the identification of good practices

- Will search for policies in a number of ways including contacting local and regional agencies, project promoters, Internet searches, etc.

- Will identify potential good practice policies in their region, country and other appointed countries, and complete the Good Practice File.

- Are entitled to identify a fixed minimum number of good practices, agreed by the Network.

- All partners will also perform a dual role as an Analyst.

- The Observer will deliver identified the good practice dossier file and corresponding evaluation grid with its evaluation score to appointed Analysts for its assessment and evaluation.

- If as a result of the joint evaluation of Observer and Analysts, the policy or training is deemed as a Good Practice, the Validator will check the correct implementation of the methodology before its publishing.

- If as a result of such evaluation, the policy is not deemed as a Good Practice, the Observer has the chance to differ and ask for the re-evaluation of the policy or training by the Mediator, the Steering Committee.

▪ **Analysts.**

- All partners will be Analysts.

- Will use the method and agreed evaluation grid to assess the good practice dossier elaborated by Observer, in a peer review process.

- Will request further information to the Observer if needed to comply with the evaluation method.

- Will perform a dual role as an Observer.

- Will participate in the mediation process with the Mediator and Observer in case that the former does not agree with resulting evaluation score.

▪ **Mediator**

- The Mediator Body will be the Steering Committee.

- Will only be required in the event of a conflict / disagreement between the Observer and Analysts evaluation of a given good practice.

- Will meet with the 2 Agents and the Observer, in the event of disagreement on a particular policy to help them to reach a final (hopefully mutual) decision about the project. The decisions available to this team of agents will be:

1. Yes (submit the project for inclusion in the Observatory) **or**
2. No (reject the project) **or**
3. "Debugging" (if agreement cannot be reached)

If a policy goes to the 'debugging' area, the reasons why the policy does not comply with the evaluation parameters will be studied. If there is not enough information to analyse the project, more information will be requested from the responsible Analyst or from the Observer, and the analysis process will re-start.

- **Validator**

  - Will be the Network Promoter, Servicio Navarro de Empleo.
  - Must understand the roles and responsibilities of the other 3 agents
  - Must understand the aims and work Method of the Observatory.
  - Must understand the aims and work method of the Observatory.
  - Will check that the method is being / has been correctly applied to policies that have been submitted as Best Practice (using a check list).
  - If the Check List gives a positive outcome, and the results are acceptable, the Validator can then proceed to validate the policy as a best practice.
  - If any of the items on the check list are negative, the Validator has a choice of either speaking to the Agent concerned or ruling that the project cannot be considered any further.

3. ANNEXES

Annex 1. Timetable with Good Practices identification and assessment.

Annex 2. Good Practice Dossier Templates.

2.1. General Policy Dossier Template.

2.2. Language Policy Dossier Template.

2.3. Training Dossier Template.

Annex 3. Evaluation Grids.

3.1. General Policy Evaluation Grid. Observer and Analyst templates.

3.2. Language Policy Evaluation Grid: Observer and Analyst templates.

3.3. *Training Evaluation Grid: Observer and Analyst templates.*

Annex 4. Method check-List template.