



D5.1 – GUIDELINES AND KIT TO SUPPORT CROSS-SPARRING PROCEDURES

This report presents all the process information and activity deliverable templates to conduct a cross-sparring (CS) between two higher education institutions over a semester period, once QAEMP self-evaluations have been made and a pairing proposed. It contains:

- A short summary for the overwhelmed, wishing to start a cross-sparring;
- The full CS process definition, including roles, and activity descriptions;
- The templates to be used in order to collect data during the CS activities.

ERASMUS+ Strategic Partnerships for Higher Education	
Project Agreement Number	2014-1-IS01-KA203-000172
Project Title	Quality Assurance and Enhancement Marketplace for Higher Education Institutions (QAEMP)
Beneficiary Organisation Name	Reykjavik University
Contact Person	Dr. Ásrún Matthíasdóttir, asrun@ru.is
Reporting Period	01/09/2014 – 31/08/2016

DELIVERABLE NUMBER D5.1	
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Dissemination level	Public
Language version	English
Location	http://projects.au.dk/cross-sparring/





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Version/revision	2.2
Delivery deadline	August 2016
Date/revision	2 September 2015 (v1.0), 9 September 2015 (v2.0), 12 November 2015 (v2.1), 12 June 2016 (V2.2)
Status	Project deliverable
Dissemination level	Public
Inputs	QAEMP WP3 & 4 & 5

Disclaimer: The QAEMP project has been funded with support from the European Commission, it reflects only the views of the authors. The Commission is not responsible for any use that may be made of the information contained therein.



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Summary for the overwhelmed

Principles and criteria

The overall CS principles are:

- to get to know each other
- to learn and inspire each other
- to be “critical friends”
- to open evaluate rather than audit
- to focus on programme development
- to support programme development

Prior to their analysis and site visits, both partners are familiar with the QAEMP self-evaluation documents (including rubrics values for criteria, argumentation and indicators). By limiting the number of criteria (Priority Criteria PC) to be analysed, an external collaborator can produce a short executive report already at the end of his/her site visit, but also learn from the institution visited. An institution can analyse the feedback carefully and make necessary corrections to their enhancement plan based on the targeted Quality Criteria (QC).

QAEMP collaborative quality enhancement

Cross-sparring (coming together) of two degree programmes/institutions A & B may enhance the quality of both programmes/institutions on selected criteria. Cross-sparring is to be understood as a process to make feedback more collaborative, concrete and objective, thanks to critical, but discreet brainstorming sessions, where strategies can be discussed less formally, repeatedly contributing to the quality assurance with a critical external view. As in sport, a sparring partner helps to keep eyes on the objectives, learn from experience and stimulate reflectivity. This approach is beneficial both for the institution evaluated, which will get a more objective view on its strengths and potential improvements, and for the sparring partner who may identify good practice that can be useful for their own institution.

The CS process is composed of four macro activities (once a pair has been proposed):

- **MA1: Initialization** (e.g. to agree on the selected PC, focus, perimeter, roles and responsibilities and composition of the CS team). This macro activity is conducted only once in coordination, for the two visits;
- **MA2: Organization** (e.g. team preparation, SE consultation, agenda, production and validation of the CS plan, etc.). This macro activity is conducted twice, i.e. one instance in each institution, it includes however coordination between the two institutions;
- **MA3: Sparring** (e.g. identify evidence related to the PC, enable identification of good practices, challenges and potential improvement actions at the cross-sparree





institution. This macro activity is conducted twice (i.e. two visits), i.e. one instance in each institution;

- **MA4: Capitalisation** (memo reporting, Marketplace updates, sponsor notification, follow-ups). This macro activity is conducted only once, in coordination.



To start:

- Form a group of people to join the QAEMP cross sparring effort in your institution for the semester
- Contact your partner via Email and inform or CC the QAEMP sponsor¹
- Fill the 3 MA1 templates and send them by Email to your partner (and CC sponsor)
 - template MA1O1: describe your institution
 - template MA1O2: optionally fill and sign a chart
 - template MA1O3: fix a visit date and global agenda
- Send your QAEMP self evaluation to your partner and receive the one of your partner.

QAEMP Market place interface and memos

The Market Place (available at www.cross-sparring.eu) serves as a tool for finding the best possible partners (A and B) as well as a forum for networking, sharing experiences, information and good practices.

By limiting the number of criteria to be analysed, external collaborators can produce a short executive report at the end of their site visit, but can also learn themselves from the institution visited. This information is collected in two memos, as such a visit memo contains two sheets, A?B (A learns from B) and A!B (A to inspire B).

1. memo sheet A?B: in order for A to learn from B on PC_A: A will describe the good practice, send the description to B for validation and commenting and upload that to a web-based market place if seen as best practices,
2. memo sheet A!B: in order for A to inspire B on PC_B: the 'cross-sparree' has the responsibility to reflect upon the good ideas that the 'cross-sparrer' has given when visiting.

Once a pair of HEIs has been selected, two instances of the CS process are to take place, with Institution A visiting Institution B and vice-versa. This gives each institution the opportunity to take on the role of both the 'sparrer' and the 'sparree'. Sponsor and observer roles can be added to the process (for process evaluation purposes or 'newbies' wishing to explore the processes). For each pairing, the sparring partner is responsible

¹ <http://www.cdio.org/leaders-cdio-regions>





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for preparing, planning and leading the cross-sparring process to ensure it conforms to the guidelines and meets the sponsor's requirements. He or she manages the delivery of the outputs (internal report for the pairing institutions, output for the Market Place, feedback on the process for the sponsor). Sparring requires honesty from both partners and can be mutually beneficial when it is conducted in the right spirit.



Introduction

The underlying assumption in QAEMP is that the cross-sparring (coming together) of two degree programmes/institutions will enhance the quality of both programmes/institutions on selected criteria. This naturally leads to the question – what to share, who should cross-spar and how can these institutions/degree programmes actually find each other and collaborate?

What is cross-sparring intended for?

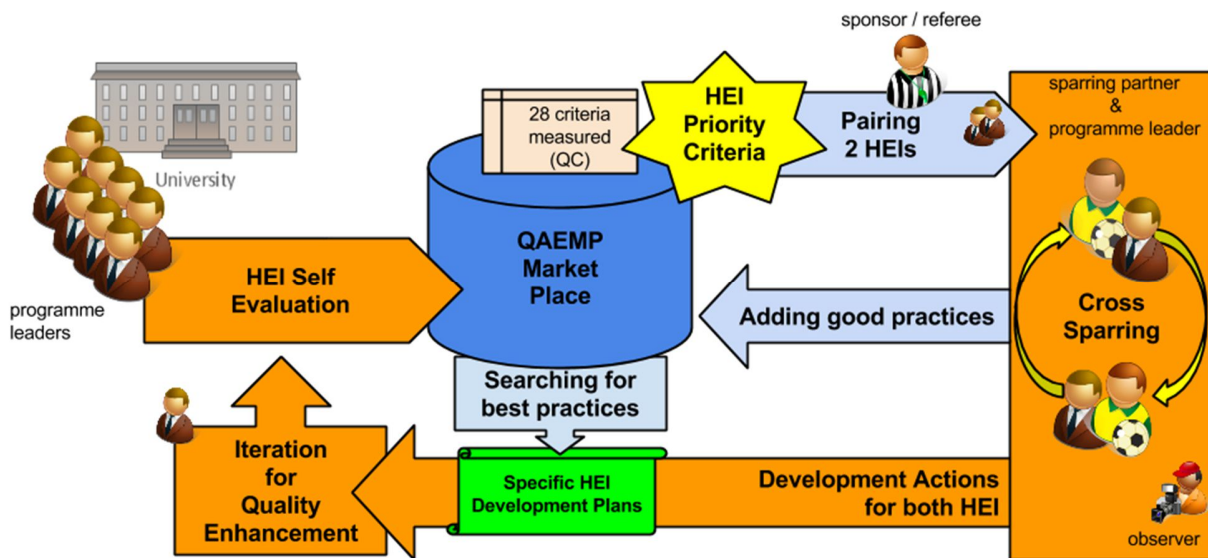
In the QAEMP project, the collaborative model is symmetrical, where one institution evaluates the other, and vice-versa. For purposes of simplicity and manageability, these flexible assessments are proposed one-on-one, hand-in-hand, on a cross-evaluation basis. As such, the QAEMP ethos is not on evaluation but rather on partnership as in sport. Sparring partners lighten up their punch while keeping their partner on their toes/providing their partner with an opportunity to improve their footwork. The model is not to plan to compete but supporting light activities to share and complement. As such, instead of cross-evaluation, the QAEMP framework introduces a less formal, more accessible and positively charged peer feedback method: cross-sparring. A CS process to make feedback more collaborative, concrete and objective, thanks to critical, but discreet brainstorming sessions, where strengths, challenges, and possible improvement strategies can be discussed, repeatedly contributing to quality assurance with a critical external view.

The overall CS principles are:

- to get to know each other
- to learn and inspire each other
- to be “critical friends”
- to open assess rather than audit
- to focus on program development
- to support program development

As in sport, a sparring partner helps to keep eyes on the objectives, learn from experience and stimulate reflectivity. This approach is beneficial both for the institution being assessed, who will gain a more objective view of their strengths and potential improvements, and for the sparring partner who may identify good practices that can be useful for his or their own institution.





- The existing SE material serves as a basis for the cross sparring process
- Institutions select QAEMP criteria they wish to enhance
- Cross-sparring includes site visits to the campus of the programmes to enhance, most of the time in both institutions
- Every partner forms a group of people to join the process effort
- Outside observers from the pair can join during the visits

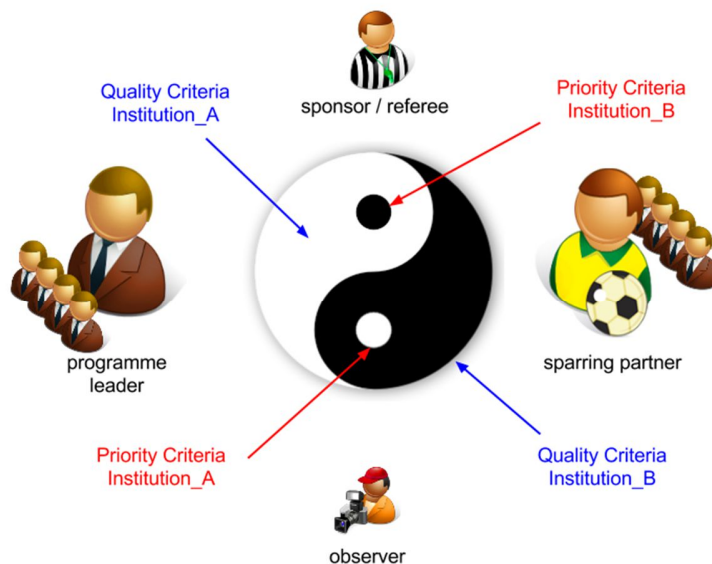
Prior to their analysis and site visits both partners are familiar with the self-evaluation documents (including rubrics values for criteria, argumentation and indicators). By limiting the number of criteria to be analysed, a partner can produce a short executive report already at the end of his/her site visit, but also learn from the institution visited. An institution can analyse the feedback carefully and make necessary corrections or new additions to his or her enhancement plan.

The Market Place (available at <http://projects.au.dk/cross-sparring/>) serves as a tool for finding the best possible partners as well as a forum for networking, sharing experiences, information and good practices. To choose the most adequate set of collaborators, able to shed light on the affordable techniques to apply for specific internal situations, matching of HEIs are to be considered for a true win-win approach, as follows:

Once a pair of HEI has been selected, two instances of the CS process are to take place, with HEI A having to visit HEI B and vice-versa. On each instance of the process, the sparring partner is responsible for preparing, planning and leading the cross-sparring process in conformity with the guidelines and potential sponsor's recommendations. They manage the delivery of outputs (internal report for the pairing institutions, output for the Market-Place, feedback on the process for the sponsor). Sparring requires a form of



honesty from both partners and can fruitfully benefit both sides/participants. Deontological charts have been defined if required.

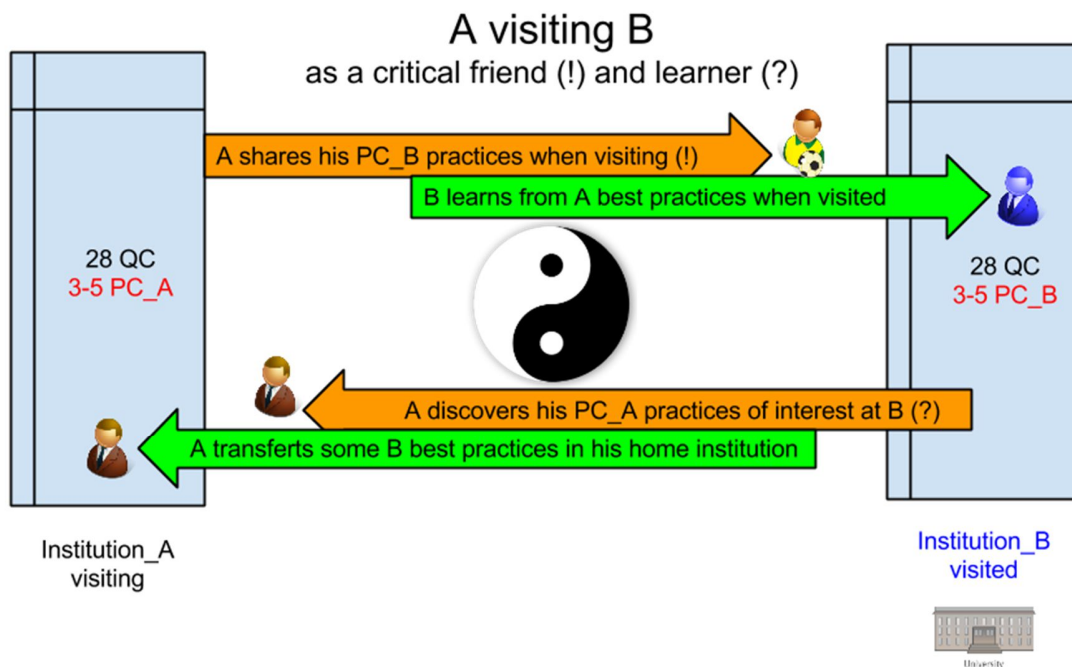


B to visit A:

- when $PC_A < QC_B$
 - B becomes critical friend (sparring partner) thanks to his/her external eye
 - A becomes learner hosting a visitor
- when $PC_B < QC_A$
 - A becomes a presenter of its best practices for its QC, which is a PC of B
 - B becomes an observer of the good practices in place at A
- A & B become comparers sometimes when $PC_A = QC_B$

The QAEMP collaborative cycles: collaborative pattern





Prior to their analysis and site visits both partners are familiar with the self- evaluation documents (including the rubrics, the values for the criteria, the rationale and the indicators). By limiting the number of criteria to be analysed, collaborators can produce a short executive report at the end of their site visit, but can also learn themselves from the institution visited. These information are collected in two memos, as such a visit memo contains two sheets, A?B (A learns from B) and A!B (A to inspire B).

- memo sheet A?B: in order for A to learn from B on PC_A: A will describe the good practice, send the description to B for validation and commenting and upload that to a web-based market place if seen as best practices,
- memo sheet A!B: in order for A to inspire B on PC_B: the ‘cross-sparree’ has the responsibility to reflect upon the good ideas that the ‘cross-sparrer’ has given when visiting.

For each visit, the memo broadly contains:

- Institutional context
- Planning and actors
- Summary of points investigated and findings
- Proposed action plan

The classical cross-sparring model: A visiting B, vice-versa

For a pair (A, B), in the classic cross sparring process, two visits have to take place (A visiting B and B visiting A). During the first visit, memos A?B and A!B have been produced. During the second visit, memos B?A and B!A have been produced.







An institution can analyse the memos feedback carefully and make the necessary corrections or new additions for their enhancement plan. Each institution must finally have 2 dedicated memos for their own concerns to prepare their development plan:

1. Institution A needs A?B and B!A
2. Institution B needs B?A and A!B



Note that the order of the two visits impacts the order in which memos parts have been produced, i.e. for an institution A: (A?B temporally followed by B!A) or (B!A temporally followed by A?B). The quality of the analysis may be impacted.

Roles in a cross sparring

	<p>Sparring partner</p> <p>Local coordinator: He or she is responsible for preparing, planning and leading the cross-sparring process in conformity with the sponsor’s demand and the guidelines (of the cross-sparring process). He or she is responsible for the delivery of outputs of the cross-sparring (internal report for the pairing institutions, output for the Market-Place, feedback on the process for the sponsor).</p> <p>Sparring partner team: The members of the team will carry out assigned activities associated with the cross-sparring visit (planning, interviews, data collection and analysis, brainstorming sessions).</p> <ul style="list-style-type: none"> • to participate in the definition of the cross-sparring plan • to verify the cross-sparring plan • to collect and analyse data • to contribute to the cross-sparring report • to fill in the feedback surveys
	<p>Local coordinator</p> <p>His or her role is:</p> <ul style="list-style-type: none"> • to prepare the cross-sparring by collecting required information and documents • to provide the cross sparring team with information and documents • to participate in different activities during the visit (presentations, interviews, brainstorming sessions) • to facilitate the interviews schedule taking into account availability of local participants • to communicate the schedule to every participant • to support the lead evaluator on logistics aspects (rooms, visio reservations)





	<p>The sponsor or referee (non compulsory)</p> <p>The guides new partners through the quality assurance process and familiarizing them with QAEMP framework which provides the methodological basis for educational quality enhancement. He or she is independent from institutions A & B. He or she is not necessarily member of the sparring partner team. In the case he or she does not take part in the cross-sparring visit, he or she is responsible for the briefing of the sparring partner team:</p> <ul style="list-style-type: none"> • he/she will ensure that the sparring partner team is aware of the objectives, and constraints of the cross-sparring; • he/she will ensure that the inputs to the cross-sparring have been made available to the sparring partner team (QAEMP self-evaluation report, focus criteria, cross-sparree’s programme description); • He/she will provide the team with all information necessary for cross sparring (Cross-sparring process, kit for sparring partner). <p>For a potential sponsor, the sparring partners may contact some CDIO leaders, e.g. international leaders or Regional leaders (all contacts in http://www.cdio.org/leaders-cdio-regions).</p>
	<p>The observer(s) (non compulsory)</p> <p>They are responsible for observing and evaluating the sparring process during a visit. They are external both to the sparring team and to the local institution.</p> <ul style="list-style-type: none"> • to observe the sparring progress (activities, efficiency, roles) in order to improve the sparring process • to collect indicators on the sparring process





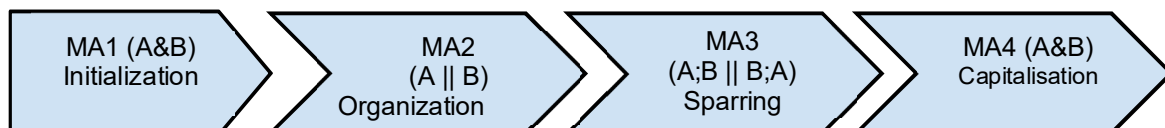
The Cross-Sparring process

A cross-sparring process (CS) has been designed and implemented in the second phase of the QAEMP project (Autumn 2015). Once a pair of HEI's has been selected, two instances of the CS process are to take place, with Institution A visiting Institution B and vice-versa. This gives each institution the opportunity to take on the role of both the 'sparrer' and the 'sparree'. Sponsor and observer roles can be added to the process (for process evaluation purposes or 'newbies' wish into explore the processes). For each pairing, the sparring partner is responsible for preparing, planning and leading the cross-sparring to ensure it conforms with the guidelines and meets the sponsor's requirements. He or she manages the delivery of the outputs (internal report for the pairing institutions, output for the Market Place, feedback on the process for the sponsor). Sparring requires honesty from both partners and can be mutually beneficial if it is conducted in the right spirit.

The characteristics of a CS instance

In its actual form, the CS process is composed of four macro activities (once a pair has been proposed):

1. **MA1: Initialization** (e.g. to agree on the selected PC, focus, perimeter, roles and responsibilities and composition of the CS team). This macro activity is conducted only once in coordination, for the two visits;
2. **MA2: Organization** (e.g. team preparation, SE consultation, agenda, production and validation of the CS plan, etc.). This macro activity is conducted twice, i.e. one instance in each institution, it includes however a coordination between the two institutions;
3. **MA3: Sparring** (e.g. identify evidence related to the PC, enable identification of good practices, challenges and potential improvement actions at the cross-sparree institution. This macro activity is conducted twice (i.e. two visits), i.e. one instance in each institution;
4. **MA4: Capitalisation** (memo reporting, Marketplace updates, sponsor notification, follow-ups). This macro activity is conducted only once, in coordination.





Duration

The duration per macro activity is context - dependent. Average duration thanks to four pilot cross-sparrings brings:

- MA1: 6 hours
- MA2: 8 hours
- MA3: 7 staff-days (e.g. 70 hours)
- MA4: 15 hours

Exemplar time frame

For an instance of a CS process, with two institutions A & B:

- **t0:** 14 September:
 - a pair is proposed
- **MA1 Initialization:** 14 September - 5 October
(deadline t0+3 weeks)(max duration 3 weeks)
 - A contacts B via Email and informs the sponsor
 - agree on the agenda, charts
 - deliverables:
 - Two QAEMP Self-evaluations sent
 - Two MA1O1 institution descriptions
 - Two MA1O2 engagement charts
 - at least 1 co-signed MA1O3 agenda sent by Email between A & B
- **MA2 Organisation:** 6 October - 31 October
(deadline t0+6 weeks)(max duration 3 weeks)
 - CS plan
 - deliverables:
 - 2 CS plans following template to be filled, sent and validated by other partner
- **MA3 Sparring:** 1 November - 30 November
(deadline t0+10 weeks) (max duration 4 weeks)
 - 1-15 November: A visits B
 - deliverables:
 - memo A?B
 - memo A!B
 - SE update if required
 - indicators document (common to A and B)
 - 15-30 November: B visits A
 - deliverables:
 - memo B?A
 - memo B!A
 - SE update if required

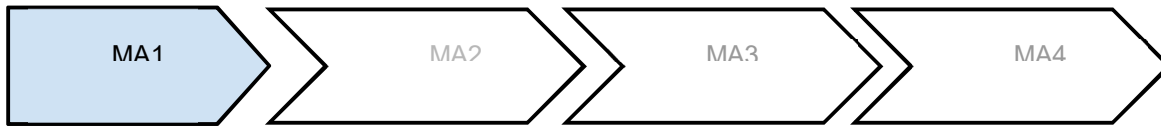




- indicators document to be completed (common to A and B)
- **MA4 Capitalisation:** 1- 18 December
(deadline t0+ 12 weeks)(max duration 2 weeks)
 - deliverables:
 - 2 internal development plans based on memos (A?B + B!A) and (B?A + A!B)
 - MP update



Activity Description Model



CS-MA1: Initialization

Goal:

The first step in the CS Process is **to agree on the objectives, focus, scope, roles and responsibilities** in the cross-sparring, circulate the initial material and initialize the cross-sparring plan.

Outcomes:

The following outcomes shall be achieved at the end of this macro activity:

- all the participants understand and agree on the objectives of the cross-sparring visit

Outputs:

The following outputs shall be produced at the end of this macro activity:

- **MA1.O1:** Institution description
- **MA1.O2:** The portfolio of 2 signed charts including engagement
- **MA1.O3:** A global cross-sparring agenda (including per institution: name of institution, the programme to enhance, priority criteria and topics of interest, initialization date and expected visiting dates) and pair agreement

Recommendations and potential risks:

The activities of MA1 are synchronized between the two institutions

- start this macro activity early enough before the expected visits, if already planned in the agenda (e.g. max five weeks before the first visit)
- take into account potential context constraints or process overlapping (eg accreditation ongoing cycle, ongoing curriculum reform or renewal) in both partner institutions

Expected workload: approx.6 hours per institution

Expected time frame: 3 weeks maximum for purpose of reactivity

Activities (including tasks, responsible/initiators and contributors/participants):

MA1.1 Objectives of cross-sparring

Initiators: local coordinator in each institution

Participants: programme leaders





A1.1.1: Recall the objectives

- Recall overall principles of cross sparring (both coordinators), as described in the CS general guidelines, e.g.
 - focus on programme development
 - open evaluation, not auditing
 - “critical friends”
 - get to know each other
 - learn from and inspire each other
 - support programme development
- Agree locally on cross sparring overall principles and goals (both coordinators and programme leaders)

A1.1.2 Circulate the initial data to the partner

Each institution will send to the paired institution information necessary to initiate the cross-sparring (institution and programme presentation, self evaluation report, any other information considered as necessary).

- Fill the MA1 template (both coordinators) including institution description (**MA101 Institution Description Template**)
- Send Self evaluation to partner’s coordinator
- Receive the SE report from partner
- Inform the partner’s coordinator of local constraints to take into account (e.g. accreditation ongoing cycle, ongoing curriculum reform or renewal)

MA1.2 Quality Scope

Initiators: local coordinator in each institution

Participants: programme leaders

A1.2.1: Identify quality enhancement perimeters

- Agree on the 3 to 5 Priority Criteria selected in each institution (both partners)
- Verify criteria scope (i.e. his/her PC <= partner QC and partner PC <= his/her QC)

A1.2.2: Identify topics to investigate during each visit, appropriate resources

In relation to the priority criteria and the respective potential strengths of each partner, topics of interest for the visits are identified (e.g. resources, stakeholders to meet, workspaces, student assessment, internships, Infrastructures to visit).

- Identify strengths of the pair being proposed thanks to the SE report and QAEMP marketplace
- Express most important topics for the visits, taking into consideration potential logistics constraints
- Inform the partner coordinator of topics or stakeholders of interest for their visit





MA1.3 Roles and Responsibilities

Initiators: local coordinator in each institution

Participants: programme leaders, potential sponsor

A1.3.1: Identify and validate the roles in the sparring pair

- Identify and allocate the different roles:
 - sparring partner coordinator and programme leaders (for each institution)
 - sponsor (optional)
 - external observer(s) as non-member of each institution (optional, under sponsor validation)
- Validate the roles by filling in the **MA1O2 Chart & engagement template**

A1.3.2: Sign the QAEMP chart (optional)

Each local coordinator could sign a chart to confirm its engagement and conform to deontological rules, under acknowledgement of its programme leaders

- Complete and sign the chart (both partners), cf. **MA1O2 Chart & engagement template**
- Send a copy of the signed chart to the partner coordinator (and sponsor, if appropriate)

A1.3.3: Keep stakeholders informed, including materials

- Distribute internal SE report to the other sparring partner and local team beforehand (2 weeks): the existing QAEMP self-evaluation material serves as basis for the process
- Communicate on the perimeter, objectives, and materials to the local team members (in each institution), at the required levels (e.g. confidentiality, topics, criteria)

MA1.4 Cross-sparring Agenda Initialization

Initiators: local coordinator in each institution.

Participants: programme leaders, expected cross sparring team members

A1.4.4: Agree on the dates

- Fix date and duration of each visit
- Produce a global cross-sparring agenda following template (**MA1O3. Global Cross Sparring Agenda and Commitment**) in line with the local team members availabilities
- Validate and commit the dates for the visits (both coordinators)
- Send the dates to the sponsor and stakeholders, including signed **MA1O3. Global Cross Sparring Agenda and Commitment template**

A1.4.5: Freeze the MP





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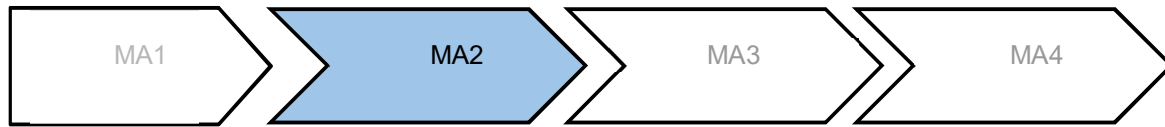
QAEMP WORK PACKAGE INFORMATION
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TO SUPPORT CROSS-SPARRING PROCEDURES - PAGE 19

- Freeze the institutional CS availability on the MP (local coordinator), via the sponsor or the QAEMP platform



**QUALITY ASSURANCE AND
ENHANCEMENT MARKETPLACE
FOR HIGHER EDUCATION INSTITUTIONS**

STRATEGIC PARTNERSHIPS FOR HIGHER
EDUCATION (2014-1-IS01-KA203-000172)



CS-MA2: Organization

Goal:

Both sparring partners form a group of appropriate people to join the efforts. **In each institution separately**, the second step in the CS Process is to prepare the cross-sparring team, to plan the in-site (local host) and external visit (outgoing host), and to agree on the QAEMP methods and tools.

Outcomes

The following outcomes shall be achieved at the end of this macro activity:

- Each sparring partner team share a common knowledge of the cross-sparring inputs, process and outputs;
- A plan describing all activities performed in conducting the cross-sparring is developed and documented together with a cross-sparring schedule;
- This plan is validated by the two institutions;
- The method of collecting, reviewing, validating and documenting all of the information related to the process is determined;

Outputs:

The following outputs shall be achieved at the end of this macro activity:

- **MA2.O1:** per partner, a cross sparring visit plan (including team members, schedule and the expected cross-sparring outputs identified)

Recommendations and potential risks:

- Collect QAEMP self-evaluation reports from and for the sparring partners is a prerequisite.
- Plan alternatives: Participants in the cross-sparring visit (local or external) may be unavailable for the visit; delay the visit, have a list of potential substitutes.
- The two visits cannot be run in parallel, allow sufficient time (at least one week) between them.

Expected workload: 8 hours per institution for the coordinator, plus team members' time

Expected time frame: 3 weeks

Activities (including tasks, responsible and contributors):

Before the preparation of the visits, each team has a briefing. The objective is to ensure that the members of the team share a common knowledge and understanding of the cross-sparring process (overall approach, activities, inputs and outputs).





MA2.1 External Visit Preparation

Initiators: local coordinator

Participants: expected cross-sparring team

A.2.1.1. Team visit definition

- Fix the participants for the external CS visit, in line with local strategies, internal and external QC priorities, agendas, etc.,
 - if necessary, roles are distributed within the team (lead, secretary, focus on specific areas according to competencies),
 - local observers can complete the team (at partner's discretion if needed)

A.2.1.2. Agreement on tools and methods

- Recall and define methods and tools for the visits
 - methods and tools (guidelines, templates) necessary to collate, review and analyse information related to the cross-sparring are defined by the cross-sparring team.
- Identify planned cross-sparring outputs

A.2.1.3. Anticipation of good practices from the external visit (to learn from the partner, A?B)

- Verify maturity dimension
 - $PC_{local} < QC_{partner}$
- Identify main limitations and challenges on QE in the local institution for each local PC,
- Survey some strengths and impressive experiences that seem in place at the partner institution (via Website, conference publications, SE report etc.)
- Anticipate data collection and observations for the future visit at the partner institution in order to learn from
- Send suggestions (or requirements) for the external visit to the other coordinator for a more fruitful visit (elements to learn from).

A.2.1.4. Analysis of the partner Self Evaluation and data (to inspire the partner A!B)

As a prerequisite, data from the cross-sparring institution should have been communicated to the team (MA.1.1)

- Verify maturity dimension
 - $PC_{partner} < QC_{local}$
- Analyse data from CS partner (program presentation, self evaluation report)
- Anticipate data collection and observations for the future visit at the partner institution (e.g. interviews, visits, in class observations, in situ student project) in order to inspire





- Send suggestions (or requirements) for the external visit modes to the other coordinator for a more fruitful visit (elements to give advice on).

MA2.2 Internal Visit Preparation

Initiators: programme leaders and local coordinator

Participants: other local actors to be involved in the cross-sparring

A.2.2.1. Team composition to host the visitors

- Fix the participants for the local CS visit, in line with local strategies, internal and external QC priorities, agendas, etc.,
 - if necessary, roles are distributed within the team
 - local observers can complete the team (at partner's discretion if needed)

A.2.2.2. Agreement on tools and methods

- Receive partner suggestions for his or her expected visit the methods and tools (guidelines, templates) proposed by the partner to collate, review and analyse information are discussed by the cross-sparring team.
- Validate or discuss the partner propositions

A.2.2.3. Anticipation of advice from the visitors (to learn from the partner)

- Recall main limitations and challenges on QE in its local institution for each PC,
- Recall some strengths and impressive experiences that seem in place at the partner institution (via Website, conference publications, SE report etc.)
- Send suggestions (or requirements) to the future visitors (via coordinator) for a more fruitful visit (elements to learn from them).

A.2.2.4. Analysis of the partner Self Evaluation and data (to inspire the partner)

- Recall data from CS partner (program presentation, self evaluation report)
- Stimulate activities for the future local visit (e.g. interviews, visits, in class observations, in situ student project) in order to inspire your partner with your good practices
- Send suggestions (or requirements) for the external visit modes to the other coordinator for a more fruitful visit (elements to give advice on).

MA2.3 Production and Validation of a detailed cross-sparring Visit Plan

Initiators: cross-sparree team and local coordinator in each institution.

Participants: cross-sparring team of the other institution

Validation: programme leaders

- Develop a specific local visiting plan including roles, activities, resources and schedule
 - the plan follows **MA201-Visit_plan_template**





- the time structure is flexible and adaptable to the complexity and number of criteria selected, e.g. for 1 to 3 criteria, one day could be sufficient (depending on the sparrer and sparree skills or level, language, culture, private/public), or 2 days for 3 or more criteria.
- the plan must also include potential risks and mitigation strategies. Potential risks may include changes to the cross-sparring team, non availability of key actors at the cross-sparree institution, organisational changes in the cross-sparree institution, travel difficulties (strikes), etc.
- Discuss and validate this plan with the other coordinator
- Send the plan, including agendas, to both team members

As an example, hereafter, a typical visit structure and schedule (default agenda for one criteria):

- *arrival the day before*
- *DAY 1: A presenting to the partner B to inspire them (based on institution selected best criteria of interest for the visitors)*
 - *9:30-10:15 open meeting, introductions, selected criteria (3 to 5, no more)*
 - *10:15-11:30 selected criteria presentation, strengths, on-going and planned actions*
 - *11:30 Lunch*
 - *12:15-14:15 questions, based on the report, more detailed presentation*
 - *14:15 Tour for criteria KPIs (Key Performance Indicators, e.g. visits to shed light on local good practices, workspaces)*
 - *15:30-16:30 visitor time to brainstorm for criteria*
 - *impressive experiences*
 - *strengths*
 - *challenges*
 - *open questions*
 - *16:30-17:30 collaborative reflections (lessons learned, program, cross-sparring, future co-operation possibilities) and fill memo A!B*
- *DAY 2: Presenting to the partner to learn from them (based on institution selected criteria to be enhanced)*
 - *9:00-10:30 selected criteria presentation, strengths, on-going and planned actions*
 - *10:45-12:00 questions, based on the report, more detailed presentation*
 - *12:15-14:15 Lunch*
 - *14:15 Tour for criteria KPIs (Key Performance Indicators, e.g. visits to shed light on local good practices, workspaces)*
 - *15:30-16:30 time to brainstorm for criteria*

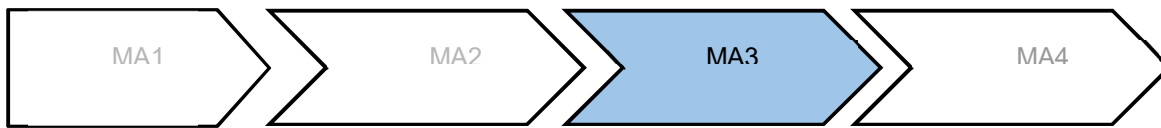




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- *impressive experiences*
- *strengths*
- *challenges*
- *open questions*
- *14:30-15:30 collaborative reflections (lessons learned, program, cross-sparring, future co-operation possibilities) and fill memo A?B*
- *15:30-16:30 present feedback to the teams*





CS-MA3: Sparring (Data Collection, Analysis, Learning and Inspiring)

Goal:

Per institution, the third step in the CS Process is to collect and analyse evidence related to selected priority criteria (PC), and to **enable identification of good practices, challenges and potential improvement actions** at the visited institution. Potential indicators associated with criteria and level are also to be identified to enrich the Market Place. Cross-sparring process includes **two site visits** to the campus of the programmes to be enhanced.

Outcomes:

The following outcomes shall be achieved at the end of this macro activity:

- Strengths, challenges, improvement opportunities and potential improvement actions have been identified in a collaborative way,
- Data related to selected priority criteria is collected and validated,
- Outputs of the cross-sparring visit are validated and recorded in memos.
- Potential indicators associated to criteria and level have been identified and recorded by the two institutions.

Outputs:

Per visit, the following outputs shall be achieved at the end of this macro activity (A visiting B):

- **MA3.O1:** Input Memo A?B (A learns from B on his PC_A) + Output Memo A!B (A to inspire B on PC_B)
- **MA3.O2:** Indicators

Recommendations and potential risks:

- have a preparatory meeting (face to face, visio or phone) before the visit

Expected workload: 70 hours per institution

Expected time frame: after MA2, 1.5 months maximum

Activities (including tasks, responsible and contributors):

MA3.1 Cross-Sparring Introduction

Initiators: cross-sparring team (institution A) and local coordinator in the host institution (institution B)

Participants: programme leader and all contributors of the host institution B.





A3.1.1. Opening meeting

- Present in an opening meeting (local coordinator)::
 - context of the cross-sparring:
 - recall the cross sparring objectives: the site visit focused on programme presentation, good practices, questions and reflections from **critical friends**.
 - the cross-sparring visit is based on QAEMP self-evaluation reports
 - selected priority criteria and needs
 - main roles and stakeholders involved
 - planning of the visit (output of MA2.4)

MA3.2 Priority criteria maturity validation and findings (A?B)

Initiators: cross-sparring team

Participants: programme leader and identified actors at the host institution B

A3.2.1: Presentation of preliminary results per priority criteria selected by the host institution

- Present and comment results and evidence identified in the self evaluation report (by programme leader or coordinator)

A3.2.2. Visit to inspire the partner

- Conduct observation on priority criteria of B, as fixed in methods and tools previously anticipated, including e.g.:
 - interviews (programme leader, teachers, students)
 - brainstorming sessions
 - presentations and questions
 - documentation review (curriculum, development plan, audit report, faculty development plan)
 - demos (on line courses, programme information system)
 - visits (e.g. workspaces, labs, course or lecture rooms, halls, FabLabs, library)
 - surveys, etc.
- Try to understand the source of potential local difficulties
- Validate or not the PC maturity levels resulting from the preliminary self evaluation
 - If, after discussion, maturity level appears to be different, the SE scoring in the MP may be updated (responsible: local host coordinator of B)
- Investigate on success factors and constraints
- Collect Findings, Impressive Experiences, and Strengths
- Prefill hints for the memo A!B





A.3.2.3. Identification of local success factors and practices (institution B) transferable to the cross-sparring partner institution A (visitor learns from the visit)

- Identify some **Strengths and Impressive Experiences** that are in place at the visited cross-sparring partner institution for your PC
- Identify **Good practices** as potential Best Practices per selected criteria to enrich the MP, including the maturity level
- Collect and clarify associated **Success Factors**
 - at least 3 success factors per criteria analysed
- Prefill hints for the memo A?B

MA3.3 Challenges for Enhancement and Open Questions (A/B)

Initiators: cross-sparring team

Participants: programme leader, identified actors of the host institution B

Analysis of local experiences and propose suggestions for enhancement (visitor gives advice to the host), in a collaborative meeting:

- Recall some **Strengths and Impressive Experiences** that are in place at the cross-sparring partner institution
- Select **Good practices as potential good practices**, if any, per selected criteria to enrich the MP, including the maturity level
- Conduct a **brainstorming session**, as collaborative reflections, based on their own experience and on findings from the visit
- Support the **visited institution** to find their own **success factors and development issues**, for each PC
- Help identify **Challenges, Restraining Forces, and Open Questions** to enhance PC maturity

MA3.4 Feedbacks and Visit Memos

Initiators: cross-sparring team

- Present feedbacks:
 - A?B: to the visitor, local good practices and success factors
 - A/B: to the visited institution (eg main findings), the assessed programme receives direct feedback from the sparring partner for future development plan
- Discuss some improvement actions:
 - for the visited institution
 - 3 to 10 **Improvement Actions** in line with criteria maturity and priority
 - potential **Future Steps** to go further
 - for the visitor





- some **Improvement Actions** thanks to the visit, transferable observations, in line with criteria maturity and priority
- Fill in the memos (the reporting process is to be compact and time-efficient)
 - memo A?B (home?local), proposed template **MA301** for sparring partner
 - memo A!B (home!local): proposed template **MA301** for visited partner

For each pair cross-sparring implementation, this memo cover page will contain:

- Institutional context
- Planning and actors
- Summary of points investigated and findings
- Proposed action plan

A visit memo contains two sheets, A?B (A learns from B) and A!B (A to inspire B).

For a pair (A,B), two visits have taken place (A visiting B and B visiting A):

- During the first visit, memos A?B and A!B have been produced,
- During the second visit, memos B?A and B!A have been produced.

Note that the order of the two visits impacts the order in which memo parts have been produced, i.e. for an institution A: (A?B temporally followed by B!A) or (B!A temporally followed by A?B). The quality of the analysis may be impacted. Each institution must finally have 2 dedicated memos for its own concerns to prepare its development plan:

1. Institution A needs A?B and B!A
2. Institution B needs B?A and A!B

- Initiate or complete template **MA302** by a list of indicators identified during the visit associated to PC or QC (Priority Criteria or Quality Criteria) and levels of the visited institution

MA3.5 Split and distribute Memos

Initiators: cross-sparring coordinators

- Split the 2 memos
- Send the 2nd part of the memo (A!B) to the other coordinator at B, at most 2 weeks after the visit.
- Receive the 2nd part of the memo (B!A) from the other coordinator at B, at most 2 weeks after the visit.





CS-MA4: Capitalisation (Development plan, capitalisation)

Goal:

The fourth and final step in the CS Process is to enrich the Market Place with **good practices** and optionally new criteria, and to produce an (internal) **development plan** in each institution.

Outputs:

The following outputs shall be achieved at the end of this macro activity:

- **MA4.O1: MP update**
- **MA4.O2: Institutional development plan**

Recommendations and potential risks:

Expected workload: 15 hours per institution for the coordinator, plus team members

Expected time frame: <2 weeks

Activities (including tasks, responsible and contributors):

The activities of MA4 are in parallel between the two institutions. They will take place only when macro activities MA3 have been completed in the two institutions.

MA4.1 Enrich the MP

Initiators: coordinator of each institution.

Participants: programme leaders, sponsor to validate

A.4.1.1. Feeding the MP with new **good practices**

- Extract Good Practices identified in the memos and prompt the sponsor for validation
 - the sponsor may update the market place with these new good practices. These good practices must be associated to a specific criteria and a maturity level (rubric).

A.4.1.2. Extend the MP model with new criteria (optional)

- Propose new criteria QC to the sponsor: when crucial criteria for QE are not sufficiently addressed in the SE model; some extension may be proposed to the QAEMP community, including maturity level definitions and rationales.
 - if validated, the sponsor will extend the MP with these new criteria.





MA4.2 Internal Feedback at Home Institution

Initiators: local coordinator in each institution.

Participants: programme leaders, every internal actor involved in the cross-sparring

- Present the results of the sparring visits (local coordinator) in its institution
- Circulate concatenated memos in his/her institution to the institutional stakeholders

MA4.3 Institutional Development Plan

Initiators: programme leader

Participants: cross-sparring team, identified internal actors involved in the cross-sparring

The institution analyses the memo feedback carefully and made necessary additions and corrections to their own analysis. Taking inspiration from the MP good practices and memos recommendations, the visited programme team refines (e.g. during a brainstorming session) the feedback and proposed actions to a development plan aimed at enhancing quality. The institution analyses the feedback memo carefully and makes necessary additions and corrections to their own analysis

- Investigate the transferability of the **B success factors at home institution**

A.4.3.1. Development Plan Production

The development plan consists of a list of actions following MA4O1 template:

- Define their SMART profile for each action (eg. specific/clear qualitative description, measurability-quantitative, achievable, realistic endeavour, and timeliness), including
 - related criteria, current maturity level, target maturity level
 - associated objectives
 - necessary resources (human, financial, infrastructure)
 - delay and period, actions are set at
 - short term
 - medium term
 - long term
 - priority
- Select actions depending on priority and achievability, including expected success indicators. The sparring partner can give advice under request (non-compulsory).

A.4.3.2. Consider a new Self-evaluation or another CS

- Optionally, plan for new QAEMP SE and CS (and inform the sponsor)

MA4.4 Cross-sparring Closure

Initiators: cross-sparring team leader and local coordinator in each institution.





Participants: every internal actor involved in the cross-sparring

A.4.4.1. Reflection, Feedback on the process

- Respond to qualitative and quantitative feedbacks on the process instance are conducted (resources, time, and property alignment). Quizzes are available online on request (compulsory for the QAEMP project partners during the development phase 2015-2016)

A.4.4.2. Unfreeze institutional availabilities on the MP

- Revise the priority criteria (PC) in the SE when necessary for expected QE
- Unfreeze the MP with availability of the institution for subsequent future cross-sparrings.





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