

STEP-BY-STEP PROCEDURE VERSION FOR PROCESSES WITH AN EXTERNAL EXPERT

Below we list a number of points to take into account when organising a **COMMIT** self-assessment process in your institution. Points to be undertaken by the person initiating this process, the **ORGANISER**, are marked in green. Points to be undertaken by his/her colleagues who have accepted to attend and contribute in the process, the **PARTICIPANTS**, are marked in brown. Points to be undertaken by the person nominated by **eucen** as **EXTERNAL EXPERT** are marked in purple. Any actions for **eucen** are marked in blue. Points for **everyone to undertake** are left in black. We recommend you to read all the document carefully, take notice of your actions and when they are needed to be done in order to facilitate the next steps to take place

This list has a chronological order. Do not move to the next step until the previous points have been done. This list can be used as a check list – you can use the boxes to tick “things done”. If the **ORGANISER** has doubts about this procedure, the **COMMIT** consortium recommends him/her to please contact **eucen** by email office@eucen.eu. **Participants**, please liaise with your **organiser** in case of doubts (see details below). Thank you.

Name SURNAME of the **ORGANISER**

Email Telephone

Procedure

- The **organiser** will get in touch with the **participants** and agree on a date for the visit – keeping in mind that two full days will be needed for this activity. The aim is to obtain agreement from 10-12 members of staff from different managerial levels and different areas. The type of participants recommended to include in the process are:
 - University leader (Rector, Vice-Rector, Registrar...)
 - Faculty/Department
 - Students/Union
 - Counsellors/Career advisers
 - Adult Education/LLL/CE
- The **organiser** will write an email to all the **participants** confirming the agreed date(s) of the activity as soon as the dates have been fixed and will include in this email the following materials:
 - Short Information for participants
 - Executive Summary of **COMMIT**
 - Policy Reminders of **COMMIT**
 - Filled in Fact Sheet
- **Participants** will block their agendas for the dates/times agreed and will respect them
- **Participants** will read all the materials received and make a note if there is anything they do not understand or want to discuss
- The **organiser** will get in touch with **eucen** and request to appoint an external expert for their internal process. The **organiser** needs to have available at this point the following information and materials that will be passed onto **eucen**:
 - Exact dates of the activity
 - Exact location of the activity (full address)

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- Full details of a contact person apart from the organiser him/herself
 - Tool(s) to be used
 - Filled in Fact Sheet
 - If there is any documents or links that would be useful to read in advance, these should be available at this point too
- Provided the **organiser** supplies all the points listed above, **euken** will contact the organiser *within 15 days* and provide the name and details of the **External Expert** nominated for this activity together with this person's CV for information so the **organiser** can contact this expert directly
- **euken** will send an invoice to the **organiser** for the consulting services that will be provided
- The **organiser** will get in touch with the **External Expert** nominated by **euken** and help him/her with the travelling and accommodation arrangements. The bookings will be done by the **organiser** who will also cover the costs of travel, subsistence and accommodation directly
- The **organiser** will book a room for the working sessions. **COMMIT** strongly recommends that the room has the following characteristics:
- Size: it must be big enough for all the potential participants
 - Disposition of table: it should be set up in a "u shape" form, which is more friendly, inclusive and allows participants to see all the other participants
 - Windows: the room must have natural light and must be possible to be aired
 - Temperature: it must have air conditioning (if the activity is organised in summer) or turn on central heating (if the activity is organised in winter)
 - Technology: it must have a computer, a screen and a projector
 - Tools: one or two flip charts (preferable to white board) should be available
 - Reproduction: easy access to printing/copying should be possible
 - Catering: water must be provided; coffee/tea and some small biscuits or sandwiches could be available too if long sessions are planned
 - Other: the room should be located with easy access to lavatories
- The **organiser** will book a restaurant for each meal (or will organise catering to be delivered) and cover the costs of the **External Expert**
- The **organiser** will send to the **External Expert** the flight booking and the hotel reservation including directions for reaching the hotel. **COMMIT** strongly recommends that the accommodation booked is in a hotel nearby the venue or in a location from where access to the venue is easy and quick
- The **organiser** will start planning the event within his/her team and will fill in the Template Agenda
- The **organiser** will send to the **participants** and to the **external expert** the following documents 15 days before the visit:
- Template Agenda
 - The tools that have been selected to be used during this activity with notes and comments from the **organiser**, if possible
- The **organiser** will phone the internal participants and will briefly explain the documents and the activity
- The **external expert** will read all the materials received and be ready to discuss it with the organiser before the activity takes place

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- The **organiser** will contact the **external expert** in video conference (Skype or similar) 5 days before the **external expert** starts to travel and discuss the materials sent: the filled in forms, need for further information/documentation, etc, and finalise the logistics of his/her trip (e.g. where to meet and how to contact on arrival)
- **Participants** will read all the materials received from the **organiser**
- The **organiser** will read the feedback report template which will have to fill in after the activity, so he/she knows the scope of the questions to answer
- The **external expert** will prepare questions and discussion points for the visit
- **The visit takes place.** The **organiser**, the **participants** and the **external expert** take notes and make a record of all the sessions, interviews and discussions
- The **organiser** distributes a copy of the feedback template to all the **participants** and ask them to filled it in within 10 days after the activity takes place
- The **organiser** fills in the Feedback Report template and, once the feedback forms from the participants are collected, collates all the information with his/hers in order to prepare a final Feedback Report *within 30 days after the activity*
- The **external expert** prepares a report about the attended activity *within 20 days* after his/her participation and sends it to **euцен** that will keep in custody until payment of the invoice by the **organiser** is made effective. This report will highlight the observed obstacles and recommend potential solutions
- The **organiser** contacts the Executive Director of **euцен** (office@euцен.eu) and sends confirmation of the payment of the invoice received
- **euцен** sends to the **organiser** the final report from the **external expert** on receipt of the payment
- The **organiser** sends to **euцен** the final version of their internal Feedback Report for benefit and knowledge of the **COMMIT** consortium that will be kept totally confidential for strictly internal use only
- The **external expert** and the **organiser** have a video conference to exchange impressions on their reports once both final versions have been prepared and the financial issues are settled. Both discuss possibilities of future actions and strategies for implementing them