



PROLEARN

European Commission Sixth Framework Project (IST-507310)

Deliverable 7.9 Learning Performance Management Portal

This report reports on the development of a portal supporting learning performance assessment processes including the selection of Edumetrics, validated scales, executions of an online surveys, and the interpretation of results.

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Executive Summary

The Prolearn Learning Performance Management (LPM) Portal integrates and enhances different outcomes and methods of other international research projects, such as ELENA, Prolearn, and Prolix. The LPM portal incorporates state of the art research on the field of learning process monitoring into one platform.

The portal is implemented as a web-accessible platform, which provides organizations with a broad range of shareable (and collaboratively editable) learning performance metrics, ready-to-use for online-surveying and benchmarking. Beyond that, the platform also will support the management of learning performance projects and guide through the creation of such projects via wizards.

The Prolearn LPM Portal provides knowledge-driven organizations with the following services:

- *Metrics Management*
 - Repository consisting of shareable high quality metrics for at least three different Learning Processes
 - Learning Environment Assessment
 - Course Evaluation
 - 360° - Feedback
 - Creating (or modifying) existing metrics (this activity can be shared between different people in sc. "Collaboration Groups")
 - "One-Click" Survey-Generator
 - Online Surveys are generated out of selected metrics
 - Online Survey Rollout Management
 - Survey Report Generator
- *Benchmarking*
 - Aggregated Data of different surveys measuring the same Metrics allow comparable indicators and benchmarking
 - Internal Benchmarking
 - Different organizational units can be compared
 - External Benchmarking
 - Different organizations can be compared
 - Mechanisms of protecting internal data
- *Monitoring Projects*: Instead of selecting metrics and creating surveys manually, predefined learning monitoring processes (like 360° Feedback or Learning Environment Assessments) with validated, ready-to-go metrics, can be created and managed using easy-to-use Monitoring Wizards. The workflow of those specific monitoring processes will be guided by the portal to provide an easy overall handling (step-by-step assistance).

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1 Prolearn LPM Portal: Core Activities Supported

Figure 1 describes the main activities supported by the Prolearn Learning Performance Management (LPM). On a more abstract level users can choose or create metrics, combine them to online or offline surveys, distribute those surveys, choose benchmark data and analyze the results.

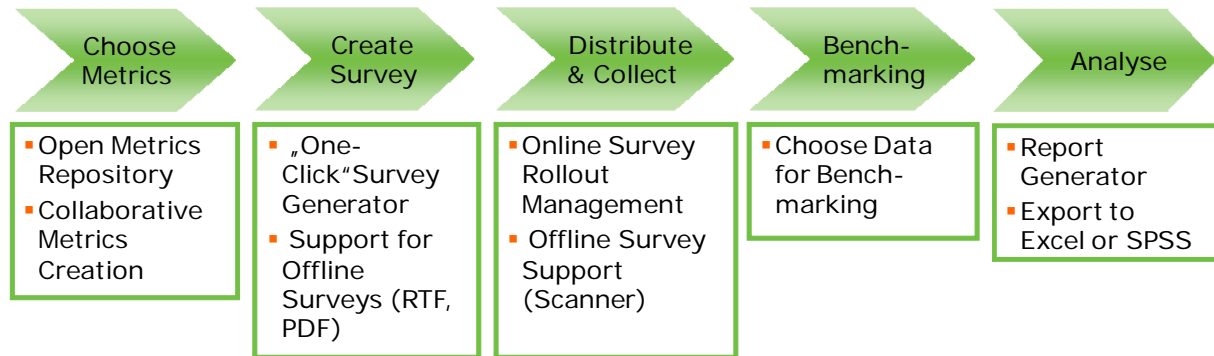


Figure 1: Prolearn LPM Portal Core Components

The portal allows organizations to choose out of a pool of different valid and reusable metrics supporting different survey-based learning management processes:

- Learning Environment Assessments,
- 360° Feedbacks,
- Course Evaluation

The users usually are members of public or private organizations (mostly members of a human-resources department or C-level management). The main activities could be classified in the following core activities:

- Metrics Management
- Survey Management with Monitoring Projects
- Benchmarking

1.1 Metrics Management

Users – looking for adequate metrics for a specific learning management process – browse the existing public metrics. Appropriate metrics can be imported into a “My Metrics” space, from where further processing is possible. Many features support the user to find ideal metrics:

- Process-Categories like “Learning Environment Assessment”, “360° Feedback” or “Course Evaluation” clearly arrange and classify the different metrics available
- Metadata Entries provide needed information for every metric
- Sorting by Creation Date shows the newest available metrics

- “Popularity” of each metric shows how many other organizations already used a metric (an important criteria, when benchmarking is intended)¹
- A Project Management feature will help to implement specific monitoring processes

Users can also create their own metrics and share them with others. However, the Prolearn LPM Portal also supports collaborative authoring. Here, different users (of different companies or of different business units of one company) aim to monitor a similar learning processes and come together to create appropriate metrics. This is done to be able to perform a follow-up benchmarking. In creating a “Monitoring Group” and becoming a member, one is able to edit shared metrics. These metrics can be used for survey rollout, reporting and benchmarking.

A user, who created a new metric by himself or in a “Monitoring Group”, publishes this metric to the “Public Metrics” space. This makes the metrics accessible to all other users, leading to the possibility, that other organizations use the metric and increase the number of benchmark-able partners.

1.2 Survey Management and Reporting with “Monitoring Projects”

Users create online-surveys out of dedicated metrics, they want to use for learning performance management. This survey may be distributed to a number of people and after a certain time the survey is closed. After that, a report is generated, showing the aggregated results obtained.

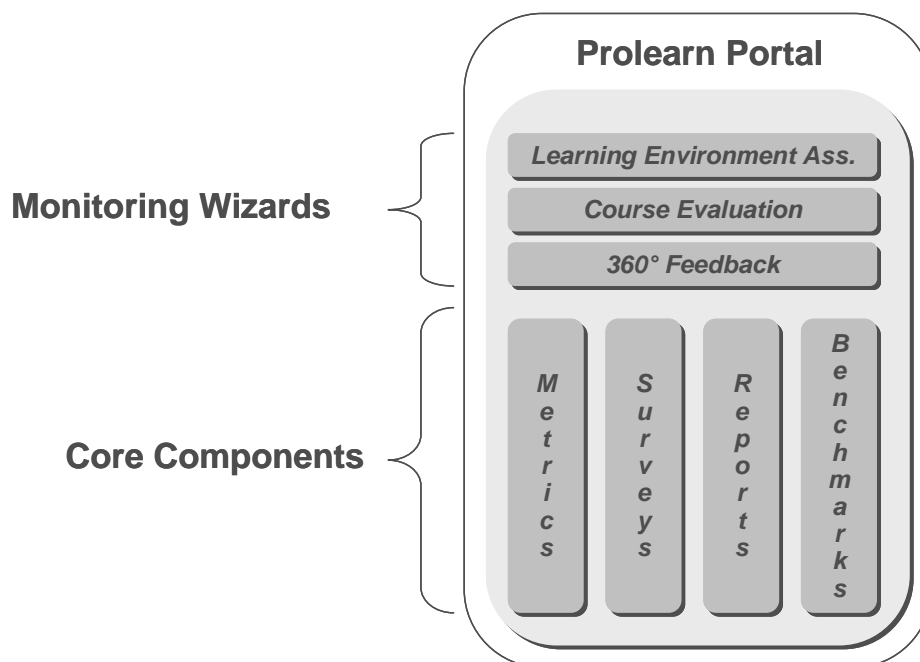


Figure 2: Prolearn LPM Portal - Architecture

¹ An interesting extension, based on this principle, would be to have at the start the “My Metrics” space prefilled with some metrics based on the organizational profile (area of business, company size etc) and other criteria (e.g. type of learning monitoring project), leaving it to the person responsible for learning monitoring to accept, modify and/or enhance them.

Specific “Monitoring Projects” will use “Wizards” to guide users through standardized and validated learning performance monitoring processes. As there are many such learning performance monitoring processes, we have to decide which of them are applicable to be supported by a survey-based IT-tool like the “Prolearn LPM Portal”. When thinking about learning monitoring there are different approaches applied to different levels of an organization. It is not only possible to measure specific learning activities (Course Evaluation), but also to monitor whole learning environments (Learning Environment Assessment), to monitor competences of employees (360° Feedback, Learning Contracts, Performance Appraisals), or to measure the effects of learning activities on process or business performance level². The Prolearn LPM Portal will support three monitoring processes, which data collection phase is survey-based and therefore ideally could be supported with the Prolearn LPM:

- Learning Environment Assessment
- Course Evaluation
- 360° Feedback

Learning Environment Assessments (LEAs) take an overall look on the companies learning environment measuring things like learning culture, motivation of employees for learning activities, general satisfaction with instructors, and many more. Metrics, scales and outcomes of a large LEA implemented in 25 companies (~ 10.000 Surveys) in Austria and Greece (Simon 2006) will be put on the Prolearn Platform.

Course Evaluation will allow companies to implement monitoring processes evaluating relevant information about internal or external courses and seminars. This method uses three steps in monitoring learning activities (Simon 2007):

- Expectation Analysis
- Satisfaction Analysis
- Transfer Analysis

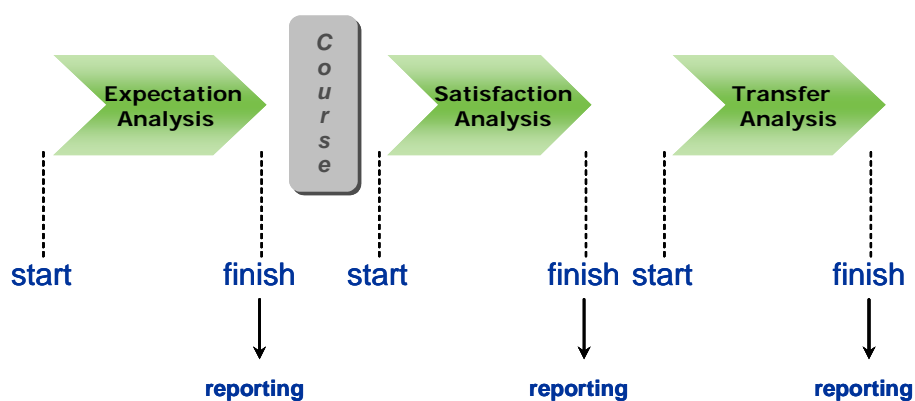


Figure 3: Course Evaluation LMP

² A well defined overview of the scope is defined by (Simon 2007)

360° Feedback will allow to create a detailed evaluation of specific individuals in a company (especially managers). Different surveys will be distributed to managers, peers, and employees of a person in the company (Edwards/Ewen 1996).

1.3 Benchmarking

The LPM Portal is also a powerful tool for automatically generating benchmarks. The idea behind that is to utilize the collaborative use of metrics, which generates the groundwork for effective benchmarking. *Collaborative use of metrics* means, that the same metrics are reused in different organizations (or in different parts of organizations), which generates a useful data pool, allowing comparison and benchmarking between different organizations.

At the LPM Portal, data of different surveys that used the same metric can be used for benchmarking. Here the following application scenarios are supported:

- **Internal Benchmarking:** An organization performs a survey measuring the same metric in different departments. After the survey is finished, (1) the departments can be compared and benchmarked with the average overall result of the organization and (2) the best performing department(s) may be determined for best practice analyzing.
- **External Benchmarking:** An organization performs a survey measuring a metric, which was already measured in other organizations via the Prolearn LPM Portal. After the survey is finished, (1) the result can be compared to other organizations and benchmarked with the overall average result of all other organizations of the sector and/or of the size of the users' organization. (2) The result may also determine the top performers of a sector and/or a company size, so best practice analyzing gets possible.

As the portal stores information like sector and company size, applicable benchmark partners will dynamically be determined. Another issue is a flexible Benchmark-Generator GUI, which allows high adaptable benchmark reports.

The Prolearn LPM Portal will support the benchmarking process as follows:

1. Metrics and Scales will become comparable, because of the collaborative use of the same metrics in different surveys.
2. Empirical data is easily collected using automatically generated online surveys
3. Different benchmark partners are available on the platform, while at the same time the visibility of our own data is adjustable by the user³
4. Dynamic Benchmarking automatically determines and suggests different benchmarking participants
5. Collection and comparison of data is provided by the Prolearn LPM Portal via Online Surveys and a Report-Generator
6. Benchmark reports are dynamically generated via an easy-to-use GUI

³ e.g. there will be privacy-options like "will my company-name be shown in benchmarking reports?" or "show my company-name only when I am one of the top 10% performers"

2 Use Cases of the Prolearn LPM Portal

2.1 Learning Environment Assessment at C Software Corp.

The C Software Corp., an SME that produces software for electronic devices in cars, is depended on a high competency of its employees to remain competitive in a globalized market. As continuing education and training is an essential and strategic company value, which is being communicated heavily in the past years, the CEO and the Director of Human Resources are both very interested, how the company's training investments influenced employees and how they perform in relation to other software companies.

After defining the aims of the planned performance measuring process, a person is defined, who will be responsible for the execution of the learning monitoring project. As the company only consists of 70 employees, the HR Director herself takes over this role.

After logging into the LPM portal she browses through the Public Metrics Space to find an adequate metric concerning her topics. Navigating in the categories, she is looking in the "Learning Environment Assessment" section, where she finds two metrics called "Motivation for learning" (consisting of 5 questions) and "Transparency of development goals" (consisting of 4 questions). Through reading the metrics description, she is informed, that they were developed at the Vienna University of Economics and Business Administration in scope of an EC-funded research project called PROLIX. From "metrics popularity" she identifies, that those metrics already have been used in other organizations. For example, the "Motivation" metric was used in 23 other companies (9 of them of companies in the software sector; 18 of the companies are SMBs). By this, she knows that there is data available for benchmarking.

In a next step she generates an online-survey out of those two metrics, which then consists of 5+4 questions, being emailed to all 70 employees. After finishing the survey, the Prolearn LPM Portal generates Reports helping her to analyze the results.

In the benchmarking report, the HR Director is able to benchmark outcomes of the survey with other companies. Here she looks first at how the motivation of employees concerning learning is situated in SMEs of the software sector. Second, she is also interested in the comparison with large companies. By this she not only provides her CEO and forthcoming strategy decisions with interesting and meaningful numbers, but also is able to contact the top performers in the software sector (as those companies agreed on being named in the Prolearn LPM Portal), to learn from the best companies concerning motivation of employees for learning.

2.2 Collaborative Performance Monitoring in the Real Estate Sector

A group of companies in the real estate sector come together with the aim to monitor and benchmark sector-specific competencies of their employees. They decide to use the Prolearn LPM Portal as new media support for their benchmark process. They create a "Monitoring Group" and design the metrics required with appropriate questions (maybe based on an existing public metric out of the portal). After finishing metric creation, a 360° feedback survey is performed in every company using the online-survey generator. After that the Portal generates the desired benchmark reports.

After the benchmarking process the metrics are published into the public space, so other companies are able to use it and more data for real estate companies will be produced.

3 Description of Core Functionalities

3.1 Feature “Metrics Management”

Overview:	Metrics should be shareable and (collaboratively) editable
Motivation:	High quality Metrics should be reused by a maximum number of organizations to provide compatible performance indicators for benchmarking
Detailed Description:	<p>Generally sc. “Spaces” contain metrics, which are organized in lists.</p> <p><i>(a) Metric representation</i></p> <p>A metric space contains different metrics. Those metrics contain 3 types of information, which are represented to the user:</p> <ul style="list-style-type: none"> • Metric-Name and Metainformation <ul style="list-style-type: none"> ○ Metric-Name: Key in the list-entry ○ Metainformation <ul style="list-style-type: none"> ▪ the most important things via mouse-over ▪ complete (edit-) view via a double click • Items of a metric <ul style="list-style-type: none"> ○ Usually scaled questions • Relations to other objects (surveys, departments, benchmarks) <ul style="list-style-type: none"> ○ Popularity/Usage: the number of surveys, in which the metric already was measured; number of people ever participated on a survey measuring the metric ○ Benchmark: is this metric “benchmarkable”⁴? J/N → graphical symbol (click or mouse-over on the symbol shows more detailed benchmark information: with how many surveys/companies in my sector or in my company size is a benchmark possible?) ○ Was this metric ever used in my company? <p><i>(b) Categories</i></p> <p>Metrics are categorized by the different measurable learning processes.</p> <p>Such categories are</p> <ul style="list-style-type: none"> • “Learning Environment Assesment”

⁴ A Metric is *benchmarkable*, if it was used and evaluated in other surveys before.

	<ul style="list-style-type: none"> • “360° Feedback” or • “Course Evaluation” <p>The default space view should provide a list, which is ordered by those collapsible categories, containing the dedicated metrics.</p> <p>(c) Order</p> <p>Metrics should be sortable by different attributes.</p>
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3.1.1 Component “Metrics Space”

Overview:	<p>Users are able to <i>import</i> Public Metrics into their “My Metrics” Space. From there those metrics can be edited (see 3.1.3), transformed into surveys (see 3.2), and benchmarked (see 3.3). On the other side, new created or edited metrics can be <i>published</i> into the “Public Metrics” Space, so they are available for others.</p>
Detailed Description	<p>User view and processes:</p> <ul style="list-style-type: none"> • Public “Metric Browsing”: users are looking for adaptable metrics applying to their needs. To support this process, the rendering of metrics has to be well arranged and adaptable. Finally the Public Space view should provide enough information for a user to choose the right metrics for his/her specific purpose. • Every User (= typically an organization) is able to import metrics from the Public Metric Space to his/her “My Metrics” Space. • Metrics in “My Metrics” Space can be used to generate and roll-out online-surveys. <p>Link to other components:</p> <ul style="list-style-type: none"> • Outcomes of these surveys are anonymously stored, so a comparison (benchmarking) between surveys (containing the same metrics) is possible.



Figure 4: Screenshot Public Metrics

3.1.2 Component “Metrics creation and editing”

Overview:	Metrics are created and edited in the “My Metrics” space of a user. Items (mostly scaled questions) can be added, edited and deleted.
Detailed Description	<p>User view and processes:</p> <ul style="list-style-type: none"> • A detailed view of a metric offers the possibility to change its attributes and linked items. • The sequence of items is adjustable (this is important, because it is exactly this sequence, which is then displayed on the online-survey)

3.1.3 Component “Collaborative Metrics creation and editing”

Overview:	Groups can be managed, to provide the basis for collaborative metrics creation and development. Members of such a „Monitoring Groups” then can be assigned to specific metrics, getting the allowance to enter a collaborative editing process.
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3.2 Feature “Survey Management”

Overview:	Metrics can be put together to online surveys. Those surveys then are distributed to dedicated participants. When a survey is finished a report can be generated.
Motivation:	A reliable survey engine is important to ensure data collection for many kinds of possible learning monitoring processes. This feature will provide the Prolearn LPM with the functionality to automate the data collection process.
Detailed Description:	<p>The Survey Management should be able to assist and automate a survey and data collection workflow:</p> <ul style="list-style-type: none"> • Creation of surveys as an aggregation of different metrics • Distribution of the survey to dedicated participants via email notification • Management of Survey Begin- and End-Time <p>User Views:</p> <ul style="list-style-type: none"> • Users should be able to track the developing status of a survey • Following information should be provided concerning a specific survey <ul style="list-style-type: none"> ○ Is the survey already finished, is it in progress or will it start in the future ○ If in progress or finished: how many participants (already) finished the survey

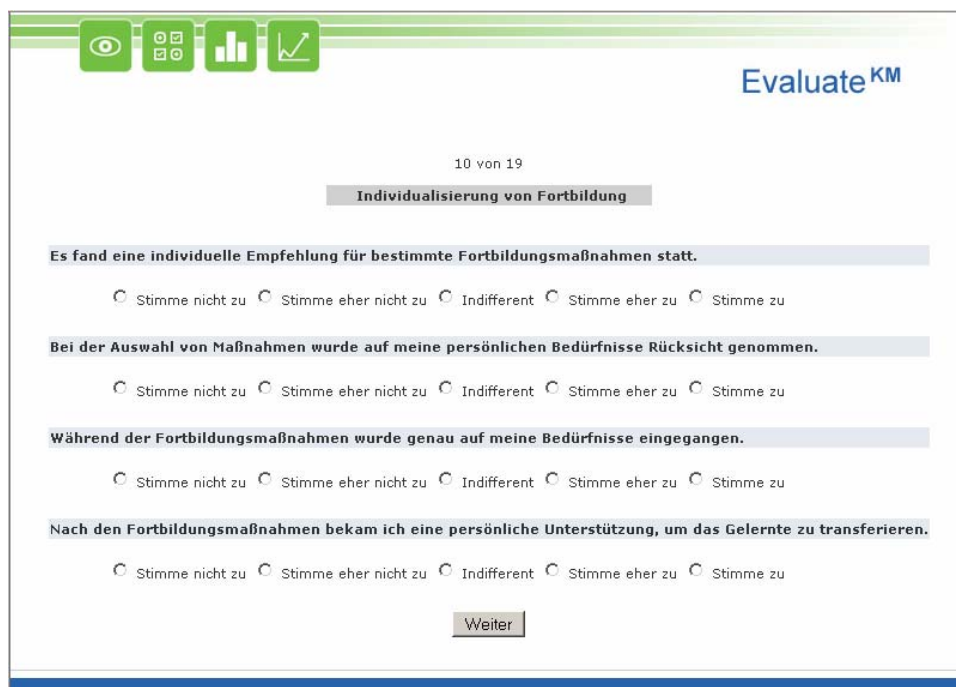


Figure 5: Screenshot Survey

3.3 Feature “Dynamic Benchmarking”

Overview:	Metrics, which have been measured via surveys, can be benchmarked. Internal benchmarking is possible if the survey was distributed in more than one department of the company. External benchmarking is possible if other companies also finished surveys measuring the metric.
Detailed Description	<p>The Benchmarking workflow will be implemented as follows:</p> <ol style="list-style-type: none">(1) The user selects a finished survey(2) The user selects one metric, which was measured in this survey(3) The user selects the type of benchmarking<ul style="list-style-type: none">o Internal Benchmarking: if the survey was rolled out in different departments of the company, those departments can be comparedo External Benchmarking: if the metric also was measured in other companies, the user can benchmark the own results with those external companies. If desired, the group of companies for benchmarking can be filtered. It will be possible to filter through the criteria “sector” (compare my results only with other companies of my sector) or “size” (compare my results only with companies, which do have the same size as I have). <p>Benchmark Output:</p> <ul style="list-style-type: none">• Benchmark data can be exported as CSV-File, so it can be imported into ex. Microsoft Excel or SPSS• Additionally a graphical representation will be provided (see figures below)



Figure 6: Screenshot External Benchmarking

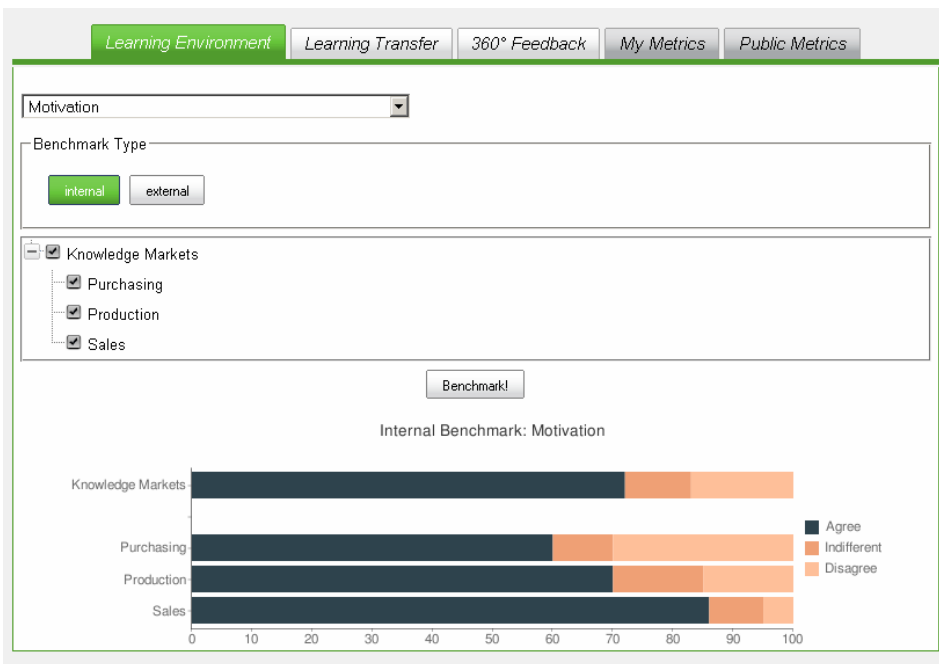


Figure 7: Screenshot Internal Benchmarking

3.4 Feature “Monitoring Project Management”

Overview:	<p>Instead of selecting metrics and creating surveys manually, predefined “Learning Monitoring Projects” can be created and managed using Monitoring Wizards.</p> <p>Three learning monitoring processes will be implemented in the Prolearn LPM as “Monitoring Project-Types”:</p> <ul style="list-style-type: none">• 360° Feedback• Learning Environment Assessments• Course Evaluation <p>Every “Project-Type” has got specific features in the creation of a new project or the survey management. The project-type “LEAs” contains just one survey, “Course Evaluation” uses up to three, which are scheduled in specific time periods (see chapter 1.2 and the component-descriptions below).</p> <p>User view:</p> <ul style="list-style-type: none">• Every project type has got its own accessible section in the Prolearn LPM tool.• “Creation Wizards” guide the user through the process of creating new projects.• In every view a structured outline shows all projects, which already were created.• For finished surveys of projects, reports (see 3.2) and benchmarks (see 3.3) can be compiled.• Projects can be deleted.
Motivation:	<p>One motivation of the Prolearn LPM is to offer valuable it-support for typical learning monitoring use-cases in company structures. To implement this we need to go beyond a mere survey tool. What is needed is an easy to use and automated workflow management for the realization of useful learning monitoring processes.</p>

3.4.1 Component “Monitoring Project Type: Learning Environment Assessment”

Overview / Description:	<p>For a company to implement a Learning Environment Assessments (LEA, see chapter 1.2), the Prolearn LPM provides users with following features:</p> <ul style="list-style-type: none">• Creation Wizard<ul style="list-style-type: none">○ The participants of a new LEA can easily be picked out of a view of the company structure (of course the company, its structure and employee data has to be deployed first). The advantage of this is, that whole departments (or the company as a whole) easily can be addressed to participate in the LEA. Additionally it will also be possible to invite dedicated participants, which are not part of the company structure map.○ Out of a pool of excellent predefined metrics, which where especially developed and already used for LEAs (see chapter 1.2 and Simon 2006, 2007) the user selects those, which should be measured in the new LEA.○ After the input of other survey-attributes like Begin- and End-Time (see 3.2) a new LEA-project is created and the survey distributed to the dedicated participants.• Projects View<ul style="list-style-type: none">○ All created and/or finished LEAs are listed in chronological order in the LEA section○ If a LEA was rolled out in different departments, the list entry is expandable, so reporting or benchmarking can be executed on department level.
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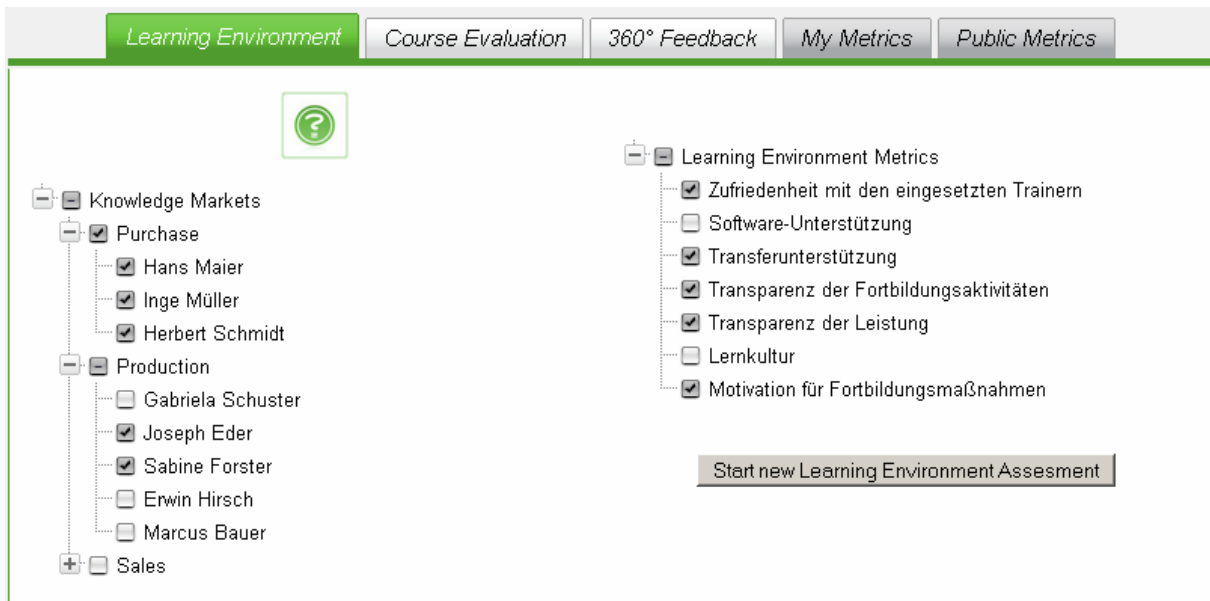


Figure 8: Screenshot Monitoring Project
“Learning Environment Assessment” / Creating a new LEA

3.4.2 Component “Monitoring Project: Course Evaluation”

<p>Overview / Description:</p>	<p>For a company to implement a Course Evaluation (see chapter 1.2), the Prolearn LPM provides users with following features:</p> <ul style="list-style-type: none"> • Creation Wizard <ul style="list-style-type: none"> ○ Course Management: To evaluate courses, those have to be created first. Typical course attributes are: <ul style="list-style-type: none"> ▪ Title ▪ Description ▪ Instructor ▪ Location ▪ Begin- and End-Time ○ The participants of a Course Evaluation can easily be picked out of a view of the company structure (of course the company, its structure and employee data has to be deployed first). Additionally it will also be possible to invite dedicated participants, which are not part of the company structure map. ○ The user decides if all or just some of the 3 steps of the course evaluation process should be accomplished (see chapter 1.2):
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	<ul style="list-style-type: none"> ▪ Expectation Analysis ▪ Satisfaction Analysis ▪ Transfer Analysis <ul style="list-style-type: none"> ○ Out of a pool of excellent predefined metrics, which were especially developed and already used for course evaluation, the user selects those, which should be measured. ○ After that, the wizard automatically calculates the Begin- and End-Times of the surveys, so the different distribution processes are scheduled correctly. <ul style="list-style-type: none"> • Projects View <ul style="list-style-type: none"> ○ All created and/or finished Course Evaluations are grouped by courses in the Course Evaluation section. ○ Every Course-Entry in the List is expandable to the 3 different surveys.
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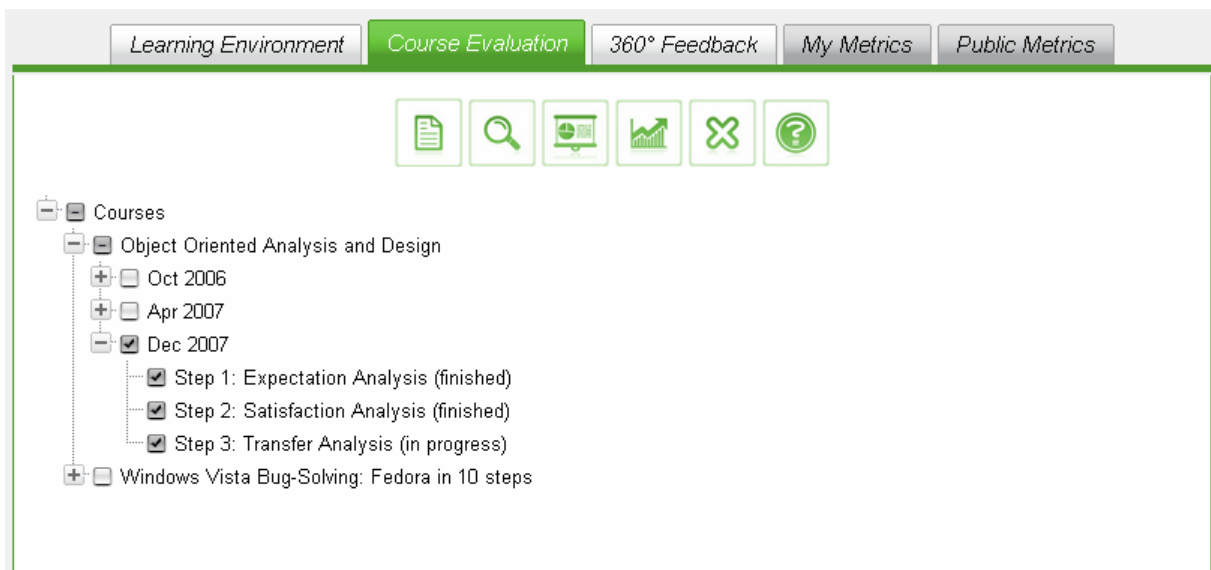


Figure 9: Screenshot Monitoring Project „Course Evaluation“ / View of existing Course Evaluation monitoring projects

3.4.3 Component “Monitoring Project 360° Feedback”

Overview / Description:	<p>For a company to implement a 360° Feedback process (see chapter 1.2), the Prolearn LPM provides users with following features:</p> <ul style="list-style-type: none"> • Creation Wizard <ul style="list-style-type: none"> ○ The employee, which is monitored, as well as the feedback providers, can easily be picked out of a view of the company
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structure (of course the company, its structure and employee data has to be deployed first). Additionally it will also be possible to invite dedicated participants, which are not part of the company structure map (in this case this sometimes may be necessary, because feedback provider can be external persons, ex. from customers or suppliers)

- Out of a pool of excellent predefined metrics, which were especially developed and already used for 360° feedback monitoring processes the user selects those, which should be measured in the new 360° feedback project.
 - As in the Course Evaluation project-type, there is more than just one possible survey. This is because metrics and items may alternate in respect to the feedback providers: the manager of the employee may be asked other questions than a peer or a customer.
 - After the input of other survey-attributes like Begin- and End-Time (see 3.2) a new 360° Feedback project is created and the survey distributed to the participants.
- Projects View
 - All created and/or finished 360° Feedbacks are listed in chronological order in the 360° Feedback section
 - The list entry of a 360° Feedback project is expandable to a list of the different surveys of the different feedback providers, so reporting can be executed for every survey.

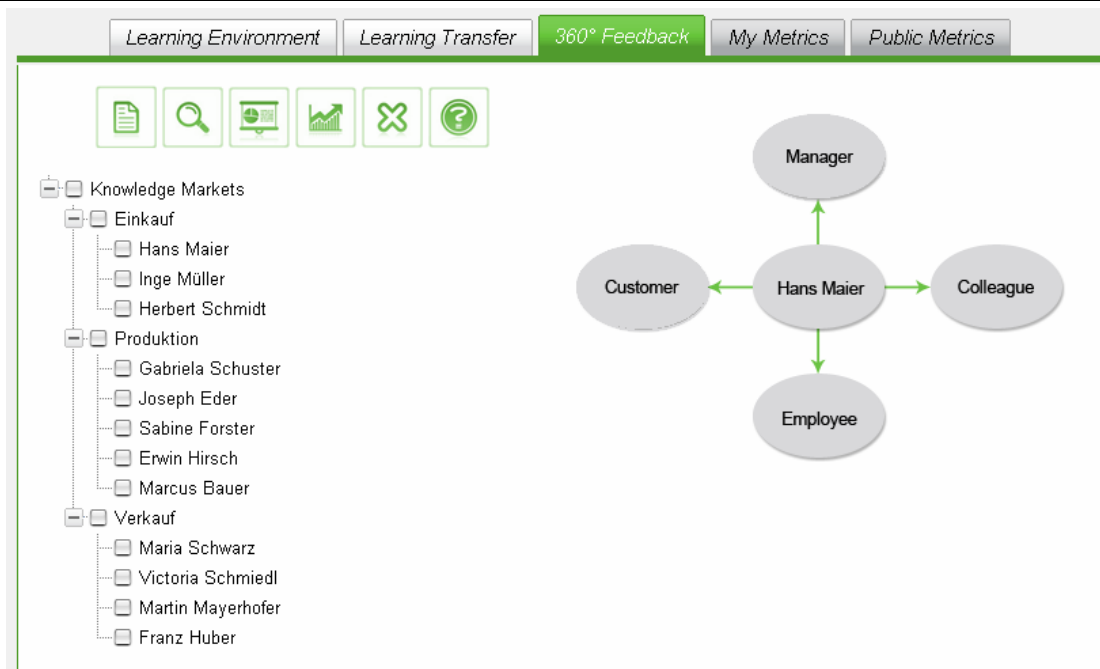


Figure 10: Screenshot Monitoring Project “360° Feedback”

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