

## The Eaquals Academic Management Competency Framework





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### **About Eaquals**

Eaquals (Evaluation & Accreditation of Quality in Language Services) is an international association of institutions and organisation involved in education founded in 1991.

Its aim is to promote and guarantee high quality in language teaching and learning.

For more information about Eaquals see [www.eaquals.org](http://www.eaquals.org)

### **Acknowledgements**

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## Introduction

The main mission of Eaquals ([www.eaquals.org](http://www.eaquals.org)) is to contribute to the enhancement of quality in language teaching and learning. In line with this mission, the Eaquals Framework for Language Teacher Training & Development (Eaquals TD Framework) was designed to provide guiding principles and tools. Building on this mission, the Eaquals Academic Management Competency Framework (AMCF) was then designed to provide similar guiding principles and tools for managers.

## The Eaquals Academic Management Competency Framework Overview

### What is the aim of the Academic Management Competency Framework?

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The Academic Management Competency Framework, or AMCF, comprises descriptors spanning four development levels to represent the range of competences that might be required across an academic manager's role.

The AMCF is not a definitive statement on the competences required by the academic manager role but is intended as a tool to support managers in the awareness raising of their own strengths and possible development paths.

The AMCF is a **working document**. The academic manager role has many variations depending on the context in which it operates, and these contexts themselves evolve over time. The framework will, therefore, be subject to cyclical review based on feedback from its users, and the changing professional environment.

### What does the Academic Management Competency Framework contain?

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The descriptors within the Academic Management Competency Framework cover eight key categories:

- Managing self
- People systems and processes
- Professional development
- Course and assessment design
- Planning and administration
- Managing resources
- Change management
- Quality and customer service, marketing

The key categories are further divided into sub-categories which focus on the component competences in further detail of each key category.



## What do we mean by 'level'?

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For most of the key categories the four development levels contain descriptors based on the following general competences:

Level 1: I can deliver existing systems and processes

Level 2: I can evaluate what I do and can try different things

Level 3: I can create new systems and assess at an institutional level

Level 4: I can facilitate the development of people and processes in order to raise organisational capacity

**Managing self:** This category is different from other categories in that it deals with competences focused on the self, rather than the role in the context of an organisation. Therefore, the levels for this category are not defined as above, but simply as numbers 1-4.

## What are the underlying principles of the AMCF structure?

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1. The 'can-do' principle: A competence may include both theoretical and experiential knowledge but is most importantly evidenced in the professional context by a practical ability to do something effectively.

2. The 'differentiation principle': Although there may be many areas of overlap, each academic manager role will have a different focus of responsibility and priority. This has two implications:

- i) Some categories may not be applicable to a specific role.
- ii) Different development levels within a category may be required for a specific role.

For a manager to operate effectively in their current role and within their own context, therefore, there is no assumption that the competences in level 4 are necessary.

3. The need for common standards

## The aims of the Academic Management Competency Framework

The wider aims of the AMCF:

- To support the professionalisation of management in the language teaching sector through increasing the shared perceptions of its functions.
- To recognise the importance of the role of management in the provision of quality education.
- To clarify possible manager roles.
- To further enable the assessment of the quality of management.
- To promote managers' lifelong learning and engagement in continuing professional development.
- To make management more attractive and provide for career progression.

*Adapted from Supporting teacher competence development for better learning outcomes (European Commission 2013)*



## **The qualities and values of management which underlie the Academic Management Competency Framework content**

The AMCF does not advocate a particular approach to management, as we recognise that appropriateness here may be context-based. We do, however, identify the following qualities and values as underlying the AMCF construct of managerial professionalism:

1. *A manager makes decisions based on evidence and critical analysis. The approach or course of action in any situation therefore, will be a principled selection rather than a purely habitual or subjective response.*
2. *A manager recognises diversity and is inclusive in their practice, and challenges behaviours contrary to this.*
3. *A manager reflects on their practice and actively pursues an inquiry-based approach to their tasks.*
4. *A manager seeks to improve the well-being of their staff and seeks to support the meeting of organisational demands without negative impact in this area.*
5. *A manager takes ownership of their actions and accepts responsibility for their impact.*

## **Who would benefit from using the Academic Management Competency Framework?**

Anyone who has a role in the achievement of organisational outcomes including, but not confined to:

Academic managers  
General managers  
Manager trainers

Organisations  
Project leaders  
School owners

Directors  
Senior teachers  
Future managers



## Uses of the Academic Management Competency Framework

Use	Examples (for specific case studies see below)
<b>Self-awareness</b>	<ul style="list-style-type: none"><li>• I want to gain a greater understanding of the management role</li><li>• I want to identify my strengths and areas for development</li><li>• I want to develop a certain competence area</li><li>• I've just been given a manager role</li><li>• I am considering a management role</li><li>• I need to become more effective in how I use my time</li></ul>
<b>Line-management</b>	<ul style="list-style-type: none"><li>• I need to review a manager's performance</li><li>• I have to conduct staff appraisals in 3 months' time</li><li>• I want to improve how my team works together</li></ul>
<b>Training</b>	<ul style="list-style-type: none"><li>• I want to choose a management course</li><li>• I want to support middle managers in change management</li><li>• I want to set a training budget for next year</li></ul>
<b>Recruitment</b>	<ul style="list-style-type: none"><li>• I want to apply for a manager position</li><li>• I want to write a job description</li><li>• I need to recruit a manager</li><li>• I want to do succession planning</li></ul>
<b>Organisational development</b>	<ul style="list-style-type: none"><li>• I want to monitor and evaluate the introduction of a new pay structure</li><li>• I want to review our operational processes</li><li>• I want to improve the way we measure our effectiveness</li><li>• I need to pass an accreditation inspection</li></ul>
<b>Project management</b>	<ul style="list-style-type: none"><li>• I want to create a project team</li><li>• I need to write a project plan</li></ul>





**Nina** is the Director of a group of language schools. She wants to understand more about the capacity of her management team, so she asks each of her managers to conduct a self-analysis using the AMCF and its support guidance. Then they work together to identify how the existing expertise that has been identified within the team can be shared where it is most needed across the organisation, and those competences that require external training interventions. She also uses the audit outcomes when identifying balanced project teams when the need arises.

**Penelope** is considering applying for a job as a DoS for a summer school. She wants to prepare for the interview. She identifies on the AMCF which competences are mentioned in the job documentation and notes examples of when she has evidenced these in her professional career.

**Iman**, a Managing Director, is preparing for performance review of the DoS, who has had some issues with his time management over the past 6 months. Iman asks the DoS to carry out self-analysis using the time management sub-category in the AMCF, and carries out the same for the DoS herself, with the aim of comparing the two and raising the DoS's awareness of areas to work on. She uses the AMCF to help the DoS set developmental objectives for the following 6 months.

**Phouthavong** is a Director and is opening a new, smaller branch of his school specialising in EYL in another town. Phouthavong uses the AMCF to identify the categories and levels of competences which will be needed by a new branch manager to successfully manage the branch, and which areas of competence can be located within the existing HQ management.

**Lech** is the Academic Manager of a school applying for Eequals accreditation and is in the process of completing the Self-Assessment form. He first refers to the sub-category on Reflection on Own Performance to help him understand where he needs support to complete a self-assessment form. He then uses this knowledge when referring to the category on People Systems and Processes and Managing Resources to help him analyse the performance in his team and their processes to complete the section: *“There is an academic management and coordination structure, with supporting systems, which ensure the implementation of the institution's educational philosophy.”* (Eequals Advisory Guide to Accreditation, p.4)

**Bahar** is a Director of a school which is looking to develop a new curriculum to extend the school's reach in the market. Bahar refers to the AMCF areas of Course and Assessment Design and Managing Resources to assess the level of skill in her team and identify those most ready to collaborate on the project. She also refers to the Project Management skills area to self-assess her own competences to run a project and to identify areas she needs to develop in order to manage the project effectively.



## The Eaquals Academic Management Competency Framework Assessment Grid

Category	Level 1	Level 2	Level 3	Level 4
<b>Managing self</b>				
Reflection on own performance and impact on others				
Time management				
Stress management				
Decision making				
Professional development				
<b>People systems and processes</b>				
Recruitment and selection				
Induction				
Performance review				
Conflict management				
Objective setting and achieving				
<b>Professional development</b>				
Assessing staff needs				
Observations				
Feedback				
Staff training and development				
Coaching and mentoring				
Career development				



<b>Course and assessment design</b>				
Needs analysis				
Structuring a course				
Tech support for teaching				
Student academic support				
Course review				
Assessment				
<b>Planning and administration</b>				
Timetabling				
Meetings				
Strategy and planning				
Creating and maintaining effective admin systems				
<b>Managing resources</b>				
Finance (costing and budgeting)				
Facilities management				
Management of hardware and software				
Resources for staffroom and students				
<b>Change management</b>				
Change management planning				
Change management implementation				
Change management evaluation				



Project management				
<b>Quality and customer service, marketing</b>				
Feedback systems (quality cycle)				
Quality assurance				
Institutional self-assessment				
Internal customer care				
External customer care				
Marketing				



## The Equals Academic Management Competency Framework Descriptors

MANAGING SELF	1	2	3	4
<b>Reflection on own performance and impact on others</b>	Understands the importance of reflection and can engage in supported review of their own performance as a manager against defined organisational standards when required.	Can independently review their own performance against the organisational standards using relevant techniques.	Has a critically reflective approach to their role and can explore and question their own beliefs about management and the requirements of the organisation and responds in a constructive way.	Can support the development of reflective professional approaches across the organisation through personal example and working processes.
<b>Time management</b>	Can allocate sufficient time to complete managerial tasks as directed.	Can prioritise managerial tasks and identify ways of working in order to make effective use of time including planning, delegation, exploiting IT resources, etc.	Can review processes and make recommendations and implement changes for improving time management within a work unit.	Can support the development of time effective and efficient approaches to operations across the organisation.
<b>Stress management</b>	Understands the possible causes and symptoms of stress in themselves and is able to seek help where necessary.	Can diagnose the causes of stress and respond in appropriate ways either in their own behaviours or the management of the environment.	Takes active approaches to the managerial role which minimise stress for themselves and their colleagues.	Can support the development of a working culture which is stress-aware and supportive of the well-being of all colleagues.
<b>Decision making</b>	Can make decisions based on evidence provided following organisation's practices.	Can identify and gain appropriate data to make evidence-based decisions following the organisation's practices.	Can make decisions based on an awareness and critical analysis of own perspectives and can make effective decisions on the basis of incomplete/complex evidence.	Can support the development of a working environment that values and fosters the evidence-based decision-making capacity of all members of staff.
<b>Professional development</b>	Understands their own needs and looks for the necessary means to meet these needs.	Regularly reflects on own needs and has developed appropriate objectives and activities to achieve and evaluate them.	Can plan and evaluate effectively a range of opportunities to further develop herself/himself professionally and align these with the needs of the organisation.	Acts as an example regarding continuing development and can train and develop others to work on their professional development needs.



<b>PEOPLE SYSTEMS AND PROCESSES</b>	<b>1</b> I can deliver existing systems and processes	<b>2</b> I can evaluate what I do and can try different things	<b>3</b> I can create new systems and assess at an institutional level	<b>4</b> I can facilitate the development of people and processes in order to raise organisational capacity
<b>Recruitment and selection (R&amp;C)</b>	Understands the existing policies and procedures of R&C and can implement them.	Has a greater awareness of the theory behind the R&C and can evaluate current practices.	Can plan, implement processes to improve current practices and evaluate their effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in recruitment and selection
<b>Induction (I)</b>	Understands existing induction policies and procedures and can implement them.	Has a greater awareness of the purposes of induction. Can use a range of induction techniques and evaluate current practices.	Can plan, implement and evaluate an effective induction programme in a variety of contexts and can assess their effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in effective induction.
<b>Performance review (PR)</b>	Understands of the existing policies and procedures of PR and can implement them.	Has an awareness of a range of PR techniques and the theory behind them and can evaluate current practices.	Can plan, execute and evaluate a PR system. Customise the PR strategies to meet the needs of the individuals and institutions.	Can facilitate the development of people and processes in order to raise the organisational capacity in performance review.
<b>Conflict management (CM)</b>	Understands conflict and the principles of CM; can recognise when these principles should be applied.	Has a greater awareness of the range of factors that contribute to successfully managing conflicts; can manage conflict in specific (familiar) situations.	Can build and implement conflict management processes at individual, team and institutional level.	Can facilitate the development of people and processes in order to raise the organisational capacity in conflict management processes.
<b>Objective setting and achieving (OSA)</b>	Can set objectives.	Has an awareness of the range of factors involved in setting objectives and evaluating their achievement.	Can effectively plan, implement and monitor an OSA system which meets both individual and organisational needs.	Can facilitate the development of people and processes in order to raise the organisational capacity in setting, achieving and evaluating objectives.



<b>PROFESSIONAL DEVELOPMENT</b>	<b>1</b> I can deliver existing systems and processes	<b>2</b> I evaluate what I do and can try different things	<b>3</b> I can create new systems and assess at an institutional level	<b>4</b> I can facilitate the development of people and processes in order to raise organisational capacity
<b>Assessing staff needs</b>	Can use the established processes to assess the needs of the staff.	Has a greater awareness of the theory behind the needs assessment and can evaluate current practices.	Can develop a process to assess the needs of staff and evaluate its effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in assessing staff needs
<b>Observations</b>	Can use the established observation tools to conduct observations and provide feedback to help staff develop.	Has a greater awareness of the practical application of observation. Can use a range of observation schemes and evaluate current observation practices.	Can design an effective institutional observation scheme, for a variety of contexts, that promotes staff development and effective feedback and can assess effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in observation practices
<b>Feedback</b>	Can give feedback to staff based on the tools and systems in place.	Has an awareness of a range of feedback techniques and the theory behind them and can evaluate current practices.	Can customise the feedback strategies involving or referring to the institutional requirements and evaluate the effectiveness of the customisation.	Can facilitate the development of people and processes in order to raise the organisational capacity in different feedback approaches and when and how to apply them.
<b>Staff training and development (T&amp;D)</b>	Understands professional development processes and can deliver staff training as it exists within the context.	Has an awareness of the range of elements that contribute to T&D and the ability to incorporate the needs of individuals as well as the group.	Can design, plan and execute a coherent staff T&D programme based on the needs of the teaching team that can be delivered in different contexts.	Can facilitate the development of people and processes in order to raise the organisational capacity in designing, planning and executing a coherent and appropriate T&D programme.
<b>Coaching and mentoring</b>	Understands the difference between coaching and mentoring and can apply a limited range of techniques.	Has an awareness of a wider range of coaching / mentoring techniques and can make informed decisions on the appropriate use depending on the context.	Can design and implement a coaching and /or mentoring system that meets the needs of the individual and the organisational culture.	Can facilitate the development of people and processes in order to raise the organisational capacity in mentoring and coaching systems.
<b>Career development (CD)</b>	Understands career development principles and can implement current organisational systems where available.	Has a developed awareness of career development options available to staff and how to implement them.	Has a sophisticated awareness of CD, and can plan, implement, evaluate and improve the range of opportunities available to staff.	Can facilitate the development of people and processes in order to raise the organisational capacity in supporting CD.



<b>COURSE AND ASSESSMENT DESIGN</b>	<b>1</b> I can deliver existing systems and processes	<b>2</b> I can evaluate what I do and can try different things	<b>3</b> I can create new systems and assess at an institutional level	<b>4</b> I can facilitate the development of people and processes in order raise organisational capacity
<b>Needs analysis</b>	Understands and can use the existing needs analysis for tools / systems / procedures.	Can evaluate the effectiveness of a needs analysis and trial alternative questions / methods or tools.	Can create new needs analyses for different learning contexts and assess their effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in creating and assessing needs analysis for various learning contexts.
<b>Structuring a course</b>	Understands the fundamentals of course design and how it is applied in the current structure of courses in own organisation.	Understands and is competent in research and can apply and assess changes to current courses.	Can create a course structure that delivers the required objectives and evaluate its effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in the process of course creation.
<b>Tech support for teaching</b>	Understands how existing technology supports the delivery of current courses.	Can assess the effectiveness of current technology and research alternatives and their impact on learning.	Can implement new academic technology and assess its impact on learning.	Can facilitate the development of people and processes in order to raise the organisational capacity in the process of testing and assessing new tech solutions.
<b>Student academic support</b>	Can work with the current system to support students academically.	Understands the role of academic support for students and can evaluate the effectiveness of the current range of interventions.	Can create a regime of academic support for students that has a positive effect on student learning outcomes.	Can facilitate the development of people and processes in order to raise the organisational capacity in effective student support and how to assess its impact.
<b>Course review</b>	Can use existing processes to review courses and assess their impact on learner progress.	Has a good knowledge of different methods and processes for reviewing courses.	Can create a review process for courses that effectively measures the impact of the course.	Can facilitate the development of people and processes in order to raise the organisational capacity in course review processes.
<b>Assessment</b>	Understands the current LTO assessment requirements / needs and principles and how they apply to the context.	Has a good knowledge of the latest research into assessment and can evaluate the effectiveness of the current assessment regime based on that research.	Can research and create assessment procedures for a new course or context and evaluate their effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in the theories of assessment and how to apply them.





<b>PLANNING AND ADMINISTRATION</b>	<b>1</b> I can deliver existing systems and processes	<b>2</b> I can evaluate what I do and can try different things	<b>3</b> I can create new systems and assess at an institutional level	<b>4</b> I can facilitate the development of people and processes in order to raise organisational capacity
<b>Timetabling (TT)</b>	Can implement an existing TT system.	Understands the principles behind TT and can adapt existing systems appropriately.	Can develop and implement TT systems to meet the needs of all stakeholders.	Can facilitate the development of people and processes in order to raise the organisational capacity in the use TT systems.
<b>Meetings</b>	Understands the purposes of meetings and how to implement them.	Has a greater awareness of the principles of meetings and how to plan, chair, contribute to and follow up effectively.	Can design an effective system of meetings or a variety of contexts and can assess their effectiveness.	Can facilitate the development of people and processes in order to raise the organisational capacity in the effective use of meetings.
<b>Strategy and planning</b>	Can carry out basic planning and admin tasks competently in line with unit priorities.	Can lead the planning and achievement of unit priorities and wider strategic aims.	Has a good understanding of overall organisational strategy and can contribute to the internal and external steps necessary to achieve it.	Can facilitate the development of people and processes in order to raise the organisational capacity in achieving strategic alignment at the unit and whole organisation level.
<b>Creating and maintaining effective admin systems</b>	Can implement the existing systems.	Has a greater awareness and can make some improvements to current systems.	Can evaluate and develop admin processes more systematically.	Can facilitate the development of people and processes in order to raise the organisational capacity to integrate systems effectively.



<b>MANAGING RESOURCES</b>	<b>1</b> I can deliver existing systems and processes	<b>2</b> I can evaluate what I do and can try different things	<b>3</b> I can create new systems and assess at an institutional level	<b>4</b> I can facilitate the development of people and processes in order raise organisational capacity
<b>Finance (costing and budgeting)</b>	Understands how to distribute the existing resources & budget that they are responsible for	Has a greater awareness of how to prioritise expenditure they are responsible for to meet the LTO's strategic objectives.	Has a good awareness of a range of financial systems and processes such as costing, writing a tender, etc. and how to use these systems and processes appropriately and effectively.	Has oversight of the total budget and can facilitate the development of people and processes in order to raise the organisational capacity in financial management.
<b>Facilities management</b>	Understands what facilities management involves and can action the existing procedures to maintain the quality of the facilities.	Has a good awareness of the range and scope of facilities management and can make improvements at a basic level to enhance the quality of the facilities	Has a greater awareness of needs and requests relating to facilities and can manage and budget for these efficiently & effectively.	Can facilitate the development of people and processes in order to raise the organisational capacity in exploiting all aspects of facilities and using them effectively.
<b>Management of hardware &amp; software</b>	Understands existing hardware and software in use and can support staff in their use at a basic level.	Understands systems which improve efficiency and effectiveness in all aspects of the LTO and is able to use these and critically evaluate them.	Can conduct a systems audit [hardware and software], analyse the data and make recommendations for changes or improvements based on budget, data and their own wider knowledge.	Maintains oversight of effectiveness and reliability of all hardware and software systems and can facilitate the development of people and processes in order to raise the organisational capacity in IT management.
<b>Resources for staffroom and students</b>	Can source relevant and useful resources for staff and student use and can organise and maintain resources to a good standard.	Has a greater awareness of the range of staff and student needs regarding resources and provides a balanced and developmental range of resources.	Can evaluate resources to ensure that they remain up-to-date and relevant to the needs of staff and students.	Can facilitate the development of people and processes in order to raise the organisational capacity in maintaining appropriate resources for staffroom and students.



<b>MANAGING CHANGE</b>	<b>1</b> I can deliver existing systems and processes	<b>2</b> I can evaluate what I do and can try different things	<b>3</b> I can create new systems and assess at an institutional level	<b>4</b> I can facilitate the development of people and processes in order raise organisational capacity
<b>Change management – planning</b>	Understands stakeholder needs and capacity and can plan simple activities to achieve stated objectives.	Can design a multi-activity action plan which could contribute to a larger-scale change initiative.	Can design a change action plan at LTO level underpinned by a principled approach.	Can facilitate the development of people and processes in order to raise the organisational capacity in planning change.
<b>Change management – implementation</b>	Can implement or support others in the implementation of a single activity action plan to achieve stated objectives.	Can implement or support others in the implementation of a multi-activity action plan which can align with a larger-scale change initiative.	Can implement or support others in the implementation of a change action plan at LTO level.	Can facilitate the development of people and processes in order to raise the organisational capacity to implement change action plans at all levels of operation and from single to multi activity initiatives.
<b>Change management - evaluation</b>	Can monitor and evaluate the effectiveness of the change activities to achieve their objectives and the immediate impact of change activities on the stakeholders.	Can monitor and evaluate the impact of change activities on LTO practice longer term and use the data for further planning.	Can monitor and evaluate how change activities impact on the defined outcomes of LTO practice and use the data for further planning.	Can facilitate the development of people and processes in order to raise the organisational capacity in evaluation of practice.
<b>Project management</b>	Understands the principles of project management and applies them when carrying out actions in a project.	Can plan, lead, implement and evaluate the effectiveness of basic projects.	Can plan, lead, implement and evaluate complex projects in different contexts.	Can facilitate the development of people and processes in order to raise the organisational capacity to plan, lead, implement and evaluate projects.



<b>QUALITY AND CUSTOMER SERVICE, MARKETING</b>	<b>1</b> I can deliver existing systems and processes	<b>2</b> I can evaluate what I do and can try different things	<b>3</b> I can create new systems and assess at an institutional level	<b>4</b> I can facilitate the development of people and processes in order raise organisational capacity
<b>Feedback systems (quality cycle)</b>	Understands feedback systems, such as surveys, focus groups and knows how to conduct them.	Can design, distribute, analyse feedback and identify and take appropriate actions on the basis of issues raised.	Can analyse feedback, relate it to institutional aims and objectives and take actions for improvements.	Can facilitate the development of people and processes in order to raise the organisational capacity in design, implementation and evaluation of feedback systems.
<b>Quality assurance (QA)</b>	Understands the principles of quality assurance and how to apply them.	Can plan, review and improve the QA systems of the unit.	Can integrate the QA systems and findings of the unit into the LTO wide QA mechanisms and meet the requirements of external bodies.	Can facilitate the development of people and processes in order to raise the organisational capacity to plan and implement the relevant QA systems.
<b>Institutional self-assessment (ISA)</b>	Understands the main principles of ISA and how to apply them.	Can use the existing ISA tools and evaluate and refine them where necessary.	Can integrate the unit's ISA into the wider LTO ISA and meet the requirements of external bodies.	Can facilitate the development of people and processes in order to raise the organisational capacity to conduct institutional self-assessments.
<b>Internal customer care</b>	Understands the principles of internal customer care and how to implement existing systems.	Can use the existing systems to identify the expectations and needs of internal customers and review them to make improvements in customer journeys.	Can improve internal customer care systems and better meet the needs of internal customers based on institutional aims and objectives.	Can facilitate the development of people and processes in order to raise the organisational capacity to design, evaluate and improve internal customer care systems.
<b>External customer care</b>	Understands the principles of internal customer care and how to implement existing systems.	Can use the existing systems to identify the expectations and needs of external customers and review them to improve customer journeys.	Can improve external customer care systems and better meet the needs of external customers based on the institutional aims and objectives.	Can facilitate the development of people and processes in order to raise the organisational capacity to design, evaluate and improve external customer care systems.
<b>Marketing</b>	Understands the principles of marketing and how to apply them.	Can understand and contribute to the creation of marketing plans with objectives based on internal and external audits.	Can link effectively the marketing of the unit with LTO wide marketing initiatives and contribute effectively to marketing decisions.	Can facilitate the development of people and processes to raise the organisational capacity to understand and participate in relevant marketing activities effectively.



## Spidergram and profiling tools: instructions for use

There are two excel files attached to the AMCF document:

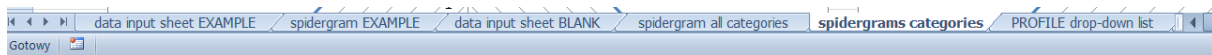
1. spidergram and profiling tool for individual managers
2. spidergram tool for teams

**These files should be used together with the full set of AMCF categories, sub-categories and level descriptors.**

### Spidergram and profiling tool for individual managers

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In the file "**AMCF\_spidergram\_and\_profile\_tool**" you will find the following sheets (at the bottom of the screen):



The first two sheets (data input sheet EXAMPLE; spidergram EXAMPLE) show an example of a spidergram created for all AMCF categories.

If you would like to see how the example spidergram changes, change the values in the highlighted column. Remember that the maximum value is 4, and the minimum value is 1.

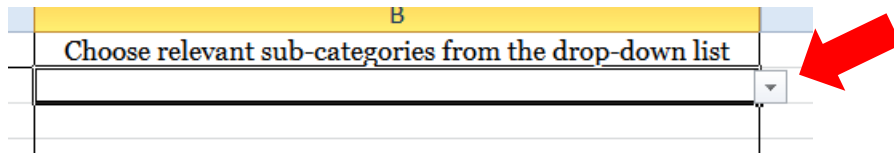
In order to create your own spidergram for all AMCF categories, as well as spidergrams for each separate category, do the following:

1. go to the "data input sheet BLANK"
2. input your assessment of level for each of the sub-categories (the column highlighted in yellow)
3. then go to "spidergram all categories" to see your spidergram for all AMCF categories, and to "spidergram categories" to see separate spidergrams for each of the 8 AMCF categories. Your ratings will be represented by a brown line.
4. the only cells you can edit are those highlighted in yellow, all other cells are blocked.



The "PROFILE drop-down list" sheet on the right can be used to create a job profile, or choose sub-categories within each AMCF category which are most relevant in a given context. To create such a profile, do the following:

1. click on the first cell under "Choose relevant sub-categories from the drop-down list" – you will see a small arrow appearing on the right



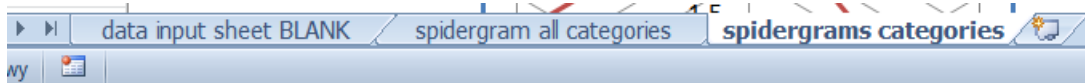
2. click on the small arrow to access a drop-down list
3. choose one relevant sub-category
4. go to the next row, click on the cell to access a drop-down list and choose another relevant sub-category
5. the drop-down list for each of the 8 AMCF categories is different, and it contains the sub-categories for this given category
6. once you have chosen relevant sub-categories for each AMCF category, a specific profile is ready – you can print it out, save as a pdf or copy into a Word document.

### Spidergram tool for teams

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This file allows to create spidergram profiles of teams of up to 20 members.

In the " AMCF\_spidergram\_TEAMS" file you will find the following sheets (at the bottom of the screen):



In order to create a spidergram profile of your team, do the following:

1. in the "data input sheet BLANK" input each team member's assessment for each sub-category in the yellow fields; P(erson) 1-20 are your team members and you can insert their names instead of P1, P2, etc
2. input the number of members in your team – if you don't, you will not be able to see the averages for your team per category or sub-category, and spidergrams will not be generated
3. once all data has been input, you will be able to see the team spidergram for all categories, as well as spidergrams for each category separately
4. you will only be able to input data into yellow cells – all other cells have been blocked



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