

USER MANUAL

A measurement and related organizational development tool to assess and elevate engagement in education

Engagement & Beyond

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Engagement and Beyond

User Manual

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1. Objectives of the tool

The User Manual will provide guideline for using the questionnaire and all related tools to be developed in this project. It will include several elements of importance supporting the use of the toolkit in a professional and ethical way.

There will be a part describing the interpretation of data gained and ways to transform them into practice. After responses arrive to the database, results will be interpreted. Mere data, and their visualization by using different kinds of charts, is only one aspect of interpretation. This method can only be good to demonstrate distribution of data, however, it does not help decision makers directly to prepare an action plan.

All conclusions to be drawn from the database, will concentrate on the practical level, namely to provide tools for leaders to improve their performance by developing their organization through increasing engagement. Based on the results of the questionnaire, a scheduled workshop with the aim of setting up actions, will be held. The next part of the guide will give a detailed description of the steps of the whole process. It will include preparation for the workshop, questions and documents needed, and also guidelines for facilitators of the event. It will also provide a detailed description of the technical background of the event, including all elements necessary for enhancing the participants' creativity.

Detailed guidelines will also be provided on:

- methods of facilitation,
- methods of collecting opinions, suggestions and results of team work,
- method of wrapping up the event and closing it.

Special attention will be paid to decide on the exact actions that are to be made by the participants. Related to this the follow-up methods will also be provided in order to motivate participants to carry out the agreed actions and report back on their achievement. Descriptions of the documents to be prepared and necessary to progress will also be provided. Also, ways and channels of communicating the results will be advised on.

There are certain principles governing the ethical behaviour of all participants and stakeholders. These principles have two sides: one is related to the participating institutions (respondents) and the second one to those parties (researchers) who collect, analyse, present and archive data, and also those who do the administrative backup work. Therefore, there will be a part in the Manual which describes ethical rules of working with data together with a sample agreement for future users also.

1.1 Organization objectives

1.1.1 Evaluation of current (recent) status

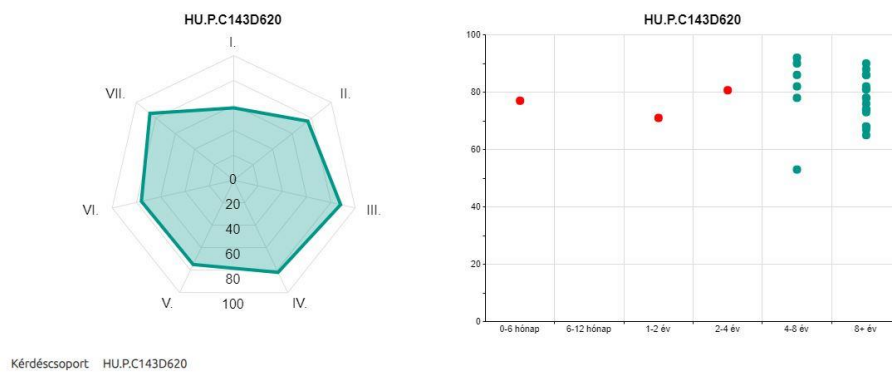
At an organizational level, leaders of organizations will understand that engagement is a key factor of the success of their organization and that they can influence engagement by making and accomplishing an action plan based on the results of a diagnostic tool.

By completing the questionnaire (see Appendix 1.), the management of the institution receives aggregated information about the engagement level of the organization.

Showing results:

a./ According to predefined question groups (categories) expressing engagement, the average values by categories will be presented (see below the radar chart on the left hand side) .

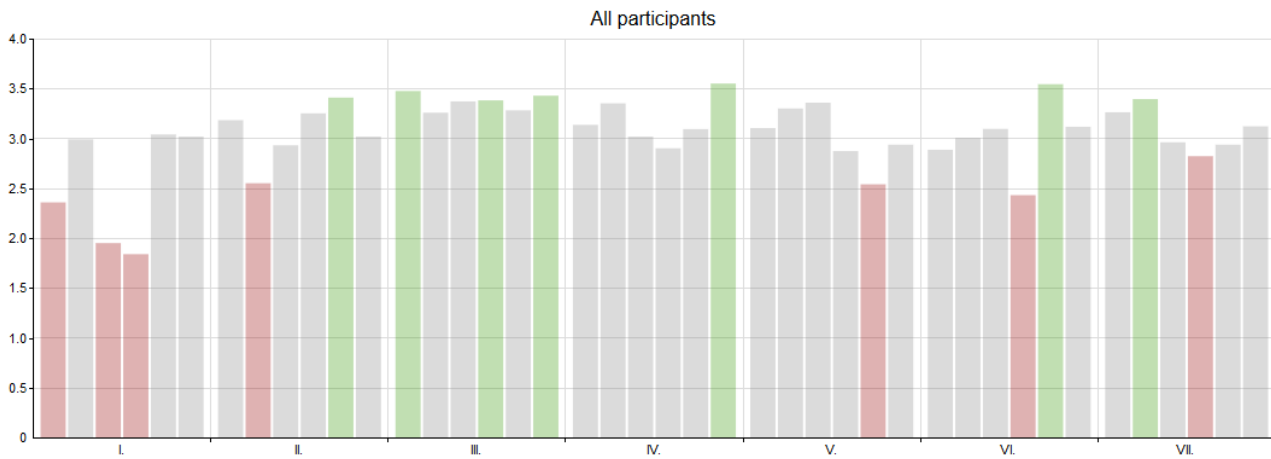
b./ Engagement Map (see below the chart on the right hand side): Participants are displayed along their score by 2 dimensions. One dimension is the score achieved within the Questionnaire, the second dimension is the time of employment in their current position.



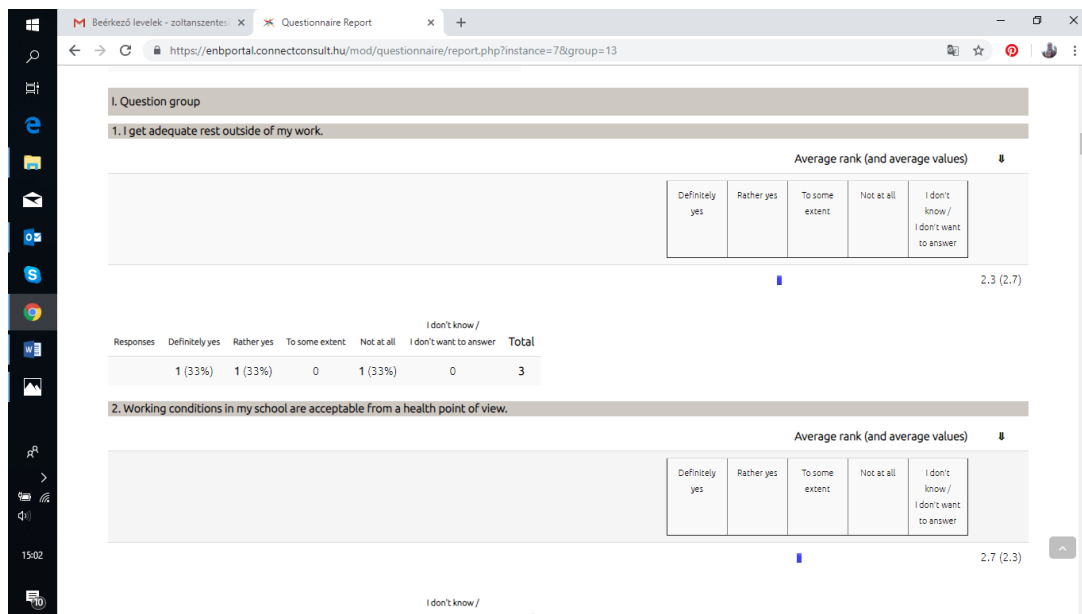
Note that there are green and red dots on the chart. Green dots represent individuals, while – in case when there are only three or less individuals in a given time-period (e.g. there are only three individuals working in the organization for, say, 1-2 years) the average of the answers is shown in red in order to avoid the potential identification of individuals.

In case you can see a grey column only within the chart it means that there are less than three answers available, this is why we will not show individual results – in order to preserve anonymity.

c./ Bar chart below shows the results question-by-question. This way evaluator can see which answers have received low, middle or high values. Low values are highlighted in red, close to average values are shown in grey, while above average values are shown in green. During Action planning workshops we advise to concentrate on those points that are shown in red – so a tangible development can be achieved this way.



d./ The average results by questions are also available, which can be analysed by questions and groups of questions also.



1.1.2 Diagnostics: what areas are to be improved

Based on the above results, the followings can be determined:

The average results by question group can be compared to each other. This helps decision makers to identify the areas, which need actions at the first step.

Grouping of employees is possible by engagement level and by the duration they work within the organization. This way 4 main categories emerge, these are:

- Orientating
- Enthusiastic
- Engaged
- Exhausted

NOTE that these categories are virtual only and will not be shown on the chart! Rule of thumb: if you divide the chart into four equal quadrants you will have an impression on the distribution of individuals. The point is not to categorize people, but to improve them, this is why we avoided strict categorization of them.

The average of the answers to each question is also shown. From these, specific strengths and areas to be developed can be defined. You can also see what percentage of the possible answers to each question were given. The results per question will help to understand what is behind the averages.

Action plan: steps for improvement

An action plan can be developed with or without an external consultant.

1. Based on the results, management determines which areas are critical to engagement.
2. The results are shared with the whole organization.
3. Action Planning Workshop

Participants, nominated by the leader/employer/headmaster will discuss the opportunities and resources available for the required change for improvement. During the workshop specific actions, responsibilities, deadlines, and resources are determined.

4. Management will provide information about specific and accepted actions for the entire organization
5. Implementation and follow-up of actions.

Evaluation of the improved status

After an appropriate time interval, 6 months or 1 year later, completing and evaluating the questionnaire again will make it possible to see if there has been a change in the level of engagement.

1.2 Individual objectives

At an individual level, we expect that participating teachers, especially those who will be included in the personal development program, will experience that they have the power to influence their own level of engagement, and thus, influence their own career and the quality of their work.

1.2.1 Evaluation of individual status

By filling out the questionnaire, the person completing the questionnaire receives information about their own level of personal engagement. **Individual results will only be available to the individual, and will not be visible to anyone else without his or her approval.**

Showing results:

1. According to predefined question groups (categories) expressing engagement, the individual values by categories will be displayed.
2. Individuals can see their answers question by question, too. This help them to get a feedback where are the points that can be developed further. This function serves as a mirror for the individual.

1.2.2 Action plan for the individual

On the basis of the score achieved and their length of employment, the individual can be virtually classified as one of the four engagement levels. As:

- ☐ Orientating
- ☐ Enthusiastic
- ☐ Engaged
- ☐ Exhausted

Since every participant will know their own results (that can only be seen by themselves), they will have a clue which category they belong to. This acts like a mirror in which the current situation of the individual can be seen more clearly.

1.2.3 Performing the action plan

- Based on the classification, the individual will receive cyclical developmental content specific to the classified category through the E&B portal.
- Studying these motivational contents will help individuals to increase their level of engagement.
- Motivational contents can be viewed several times.
- Feedback to the individuals

Feedback to the individual about the change in the level of engagement will be available and evaluated after a further completed survey.

2. Code of ethics, data protection

Basic principles of personal integrity and mutual respect

- o The user names required for logging in are distributed by people with portal administrator privileges during the project, ensuring the anonymity of the participants.
- o Individual responses are only visible to the individual. The Head teacher will not see any individual result! Individuals cannot be identified.
- o Answers will be presented in groups, without the possibility of individual identification. They will be used by the leaders of the organization to better understand the needs of the organization and to improve its processes.

Data usage restrictions, anonymity of participants

- o Data security and handling are based on GDPR regulations.
- o Every institution individually decides how to communicate with their participants to ensure full anonymity
 - ☐ create e-mail accounts for the project – different from the known ones - that don't contain personal information
 - ☐ the way of login and completion of the questionnaire
 - ☐ the way of sending motivational contents or links to participants.

Administrators of the project have to sign a written statement about their duty to comply with all GDPR regulations and to keep any known personal data of participants confidential.

NOTE that in every countries there should be national level coordinators who coordinate the activities within the given country, provide guidance answer questions etc.

Their names and level of access to data are as follows:

EN.Superleader

DE.Superleader

HU.Superleader

PL.Superleader

These persons can see all results of their countries, but not the ones of other countries!

Ethical issues

Results of a survey - along with other criteria - can be considered reliable if it is done voluntarily and without a person's name. However, after evaluation of the survey, it is recommended that management share the overall results with all participants. A decision on this depends on the organizational culture, but it is worth considering that a move in the right direction – more openness and transparency - has a positive effect on staff and increases involvement in itself. This openness

is the basis for future communication, actions and periodic repetition of the questionnaire to see how engagement is evolving, both on an individual and school level.

Code of conduct

This code is meant for using E&B project tools and they are valid for all participants

- Reliability— Participants can trust there is maximum protection of their private data
- Transparency — Objectives and processes are communicated in a transparent way
- Trust — Confidence in the ability to improve personally and as a whole institution is based on the knowledge of transparent processes and clear communication.

Management and staff have to agree on following principles:

- Every person has value and can contribute and will be acknowledged
- Open communication ensures the best results through continuous improvement
- There is confidence in the ability to improve personally
- There is confidence in the ability to improve as a whole institution
- Processes and communication are clearly stated for all participants
- Professional respect and courtesy reigns, regardless of position or title
- Every constructive discussion helps to achieve the overall goals.

3. Questionnaire

3.1 Description of questions and answers

- o The questionnaire contains 42 questions
- o There are 7 different question groups.

Content and description of question groups:

Basic needs

These needs are those that are essential, without which one cannot work.

- a. One is salary, without which nobody works in his/her professional life. (Voluntary work exists, but this is another issue.)
- b. Other compensations like bonus, cafeteria etc.
- c. Basic working environment, like heating, lighting without which one cannot work or it is highly uncomfortable
- d. Rest – if one cannot rest it leads to exhaustion – life threatening situation.

Safety needs

- a. that the job provides stability in the longer term; if not, one cannot be sure whether to stay or not; whether the first basic need is not in danger.
- b. life is not threatened by e.g. bullying people (it can be a problem in certain regions).
- c. if a person is threatened or humiliated by his/her boss this is an aggressive behaviour that is a continuous stress.

Affiliation (Belonging)

It is the feeling that one belongs to a team, a group, or at least feels bound to one person e.g. a mentor. Humans are social beings and do not like separation – therefore belonging is important.

Recognition (Esteem)

It improves our self-esteem, when others (peers, superior, society, pupils) appreciate what one does. It contributes to self-confidence, strengthens the ego, justifies that what we do is right. (We are part of the tribe – a very ancient need from the dawn of mankind.)

Cognition

A personal need for professional development in his/her professional life, understanding where the profession as such is heading –e.g. new principles in teaching like reform pedagogy pros-cons. New teaching techniques etc. Part of it is professional advancement (not the career, this is the next level).

Self-actualization

It is different from person to person. For one it is to be the best teacher, for another it is to advance in one's career, or to serve pupils and make them the best in town. It relates to one's dream: what is the self-image.

Higher good (Social contribution)

The activity one does serves a higher purpose: advances the society, contributes to the development of the profession (writing a book) saving gorillas (it is not a typical teacher activity) so his/her activity serves the society/planet/ higher power, you name it.

- Possible answers are:
- Definitely yes
- Rather yes
- Rather no
- Not at all
- I don't know / I don't want to answer

3.2 Description of categories

3.2.1 Orientating

The Orientating colleague has entered the organization freshly or a few months before and has a low degree of involvement. Because she/he doesn't know the job in details, the employee has a lot of uncertainty, has many more questions than answers. This is reflected in her/his behaviour and speech. Regular help and encouragement are required from the organization. Usually, the impression of the first few weeks determines whether the new colleague stays or not in the organization in the long run. Therefore, the first impressions made by the organization are decisive. Because she/he is not always aware of the expectations new colleagues are rarely good team players and typically perform only the required standard. When making a mistake, she/he seldom notices it, so more frequent supervision is needed.

Threat / Opportunity

If she/he does not get clear guidance, they may become uncertain and easily change jobs as soon as an opportunity emerges. If clear guidance is given, she/he can move into the upper (Enthusiastic) category.

What do we want to achieve?

Our goal is to provide information, encouragement, positive feedback, engage her/him in less complex tasks to unlock a positive sense of achievement. Accurate assignment of tasks and step-by-step explanations are required.

3.2.2 Enthusiastic

The Enthusiastic colleague enters the organization freshly and has a high degree of involvement. She/he is full of plans, suggestions, participates in organizational initiatives, works more than expected. She/he is the one who is asking less (vs. Orientating colleague), tends to encourage others, has new ideas, new suggestions, wants to use her/his own potential to the maximum. She/he is a good team player, strives to be one, and launches new initiatives. This colleague typically performs above the standard. If a mistake is made, she/he rarely notices it, so regular supervision is advised.

Threat / Opportunity:

If she/he does not get tasks proportional to her/his talent, does not get satisfactory answers, or her/his initiatives are rejected, that may lead to uncertainty and years may pass without moving up to the Engaged level and they may slip into the Exhausted category. If too many opportunities are given, she/he will not integrate into the organization, but rather move in completely new directions that are not necessarily beneficial for the organization, and can even be detrimental. If we can nurture her/his enthusiasm and help to get engaged in meaningful activities she/he will stay in the organization for a longer period and will be able to move into the Engaged category. Choosing a mentor can be of help in the personal development process.

What do we want to achieve?

Provide sufficient space if she/he has good idea and to make it happen, but at the same time it is advised to equip her/him with step-by-step explanations that fits into the practice of the organization.

3.2.3 Engaged

The Engaged colleague has been working for the organization typically for several years and has a high degree of involvement. She/he is the one who, after years of committed work still has new plans and suggestions for improvement. She/he does every day work reliably. Management and peers can count on her/his well-established routine and helpful attitude. Her/his speech and motion is dynamic, seldom hesitating, does the job precisely, observes deadlines. If mistaken, takes responsibility, performs reliably, above the standard.

Threat / Opportunity:

If she/he does not have enough variation in her/his work or does not get the deserved respect, can gradually slip into the Exhausted category.

Opportunity: in fact, if we can keep her/him in this category, she/he is the best workforce. If possible, and especially if she/he seems to need it, enrich her/his job so that she/he will feel appreciated and important. She/he is generally suitable for leadership (e.g. as team leader) position.

What do we want to achieve?

The goal is to keep the level of engagement. Make clear that management counts on her/his 'core member' status. We can set her/him as a role model for newcomers, though over praising may lead to adverse feelings among colleagues.

3.2.4 Exhausted

The Exhausted Worker has been working in the organization (we use intentionally the preposition 'in' and not 'for') for ages and has a low involvement rate. Enervated, and this is reflected in her/his motion and speech. She/he does the job slowly, performs below the standard, performs unreliably, misses deadlines regularly, and looks for excuses when making mistakes.

Threat / Opportunity

The danger is that she/he will remain in this state permanently and pull back the others. Opportunity: encouraging out of this state e.g. by providing a coach or mentor for this task.

What do we want to achieve?

If she/he was a well-performing colleague earlier, try to bring her/him back to the right track. Make clear for her/him that this attitude is unacceptable for everybody, so a significant improvement is needed.

4. Consequences

The project has a lot of implications that may differ depending on institutions and participants, but can be roughly grouped and outlined as follows.

4.1 Personal consequences for teachers

After years – sometimes decades – of teachers' lives being focused on students, a new point of view will be introduced: well-being, personal growth and development, integration, communication for the common goal becomes the new focus:

- Teachers feel accepted and cared for by the school
- They feel cherished, to be considered and that his/her well-being is important
- Responsibility for the individual and personal well-being will be awakened.
- Monitoring the process of the teacher's own engagement to work will help to design an individual career path.

4.2 Group consequences

As part of a school staff, teachers got used to working independently, in some cases dialogue and discussion occurs rarely – separation and fragmentation can occur.

- Communication within the group will improve
- Mutual knowledge about each other will improve the understanding of colleagues
- Better understanding can promote mutual helpfulness
- More time spent together during activities can boost the well-being of teachers.

4.3 Consequences for the leader

Through clear communication using the tools and cooperation during the project, leaders and staff have more occasions for talking about more than obligatory school issues.

- Less conflicts within the staff
- Openness and transparency grow
- Stronger attachment and loyalty of the staff to the school/institution.

4.4 Consequences for the institution (school)

As teachers feel much more cared for, they take on more responsibility for their health, and as a result the school

- Suffers less staff illness
- The risk of total fall-out by burn-out reduces
- Fluctuation of staff can be minimized.
- Constant self-monitoring of the teachers' involvement process is an important tool in designing their own path of professional promotion at school (e.g. for the need of pedagogical supervision from the school board).

5. Case study

The objective of a Case Study:

By using concrete cases, this shows how an entire E&B engagement assessment looks from the emerging need, through the execution, until the changes and follow up. The Case Study cannot contain personal information which could make the individuals or the institution identifiable.

The questions under each sections help to compile the Case Study.

The structure of the Case Study:

1. The data of the institution in the Case Study
 - Type of institution
 - Alias name
 - Country
 - Number of employees
 - Number of participants in the engagement survey
 - The mission of the institution
2. Events – to detail the steps of the engagement assessment process in an essay
 - Decision making about the engagement assessment
 - Who initiated it?
 - The objective of the engagement assessment
 - The preparation for the assessment
 - What kind of preliminary steps preceded the assessment?
 - Who were involved in the decision making?
 - What type of communication was used during the decision phase?
3. Preparation
 - What type of concrete cases occurred during the preparation?
 - How many people were involved in the preparation and what were their tasks?
 - What was the selection criteria for the participants in the preparation?
 - What type of communication was used in the preparatory phase?
 - Applying data protection individual registry number based on the requirements of GDPR.
4. Execution phase 1. – Filling in the survey
 - How did the survey reach the participants?
 - What problems, questions were raised by the participants while filling in the survey?
 - How much time was available for the participants to fill in the survey?

- What type of communication was used during the execution phase?
 - reminders
 - verifications and discussions

5. Execution phase 2. – evaluation of the results

Events after the deadline

Summary is available in the system for individuals based on their own answers for the survey

What type of questions, comments came from the participants during or after filling in the survey?

From which point in time did they receive motivational contents? (We provide motivational contents based on their individual answers in the system)

What type of individual initiatives are known for the organization?

6. Results at the level of the organization

- Who evaluated the results?
- Were external consultants involved?
- How much time was needed for the evaluation of the results? How much later was the action planning Workshop organised?
- What are the first conclusions?
- What type of communication was used in this phase?
- Communication about the preliminary results
- What was communicated and by whom?
- What deadlines were set connected to the next steps?

7. Action planning Workshop

- How much later was the Workshop organised compared to the communication of the results?
- Who were involved in the preparation of the Workshop?
- Was an external consultant involved?
- When was the Workshop held?
- Who participated in the Workshop?
- What methodology was used during the Workshop?
- What is the outcome of the Workshop?
- In which timeframe should the action points be executed?
- What communication was used and for whom in this phase?
- How transparent are the action points for the organization created on the Workshop?
- Implementation of the action points
- How much responsibility and empowerment did those assigned to the action points get for its implementation?
- How was/will be the implementation of the action points measured?
- Who and on which forum were the steps of the implementation communicated?

8. Describing the results of the implementation

- Describe the most important concrete measures and their impacts
- Describe the methods of the follow up activities

9. Describing the participants' feedback

- The methods of collecting feedback on the entire project
- Project evaluation based on the feedback

10.. Summary/ Feedback

- The head of the institution's summary of the entire project
- What are the benefits for the organization and the individuals?
- How can this E&B tool be integrated into the processes of the institution?

11. Follow

up

After a certain period the whole exercise described above can be repeated to see the advancement of the organization. This is supported by the Report generator program (see later).

6. Processes

In order to achieve the goal of the project there is a chain of connected processes to perform entirely and completely. For a profound understanding the detailed description of the processes can be studied in the following steps.

6.1 Data acquisition

6.1.1 Available data in the system

Basic structure contains primary data of participants – pseudonym, role(s) and answers to the questionnaire(s).

Evaluation provides results as secondary data that can be visualized and will be saved. A second questionnaire compilation – at a later time – provides similar data, so the outcomes can be compared in order to see the effectiveness of the performed actions.

After evaluation a list of motivational contents supports the personal development of participants according to their scores.

6.1.2 Description of different measures

The following figures show the outcomes of the evaluation of the overall answers to the questionnaire. (Endpoints are measured within the system.)

a.) Radar diagram:

shows the summarized scores of all answers per dimension /category

b.) Scattergram:

maps the organization on two axes. Y is the engagement score of the respondent in %, X the period the given colleague has been working in the organization.

c.) Barchart:

is the summarized score per question, where the maximum values is 4. Note that the seven lowest bars are highlighted in pale red, while the upper 7 bars in green. This makes it easier to plan and to run an Action planning workshop.

d.) Below these are the results per dimension/category, expressed in % - this correlates with the Radar diagram.

e.) The next figure is the distribution of the period for which respondents have been working for the organization. Note that this chart shows how balanced the organization is in terms of the maturity of colleagues.

f.) The next figure shows the detailed results question-by-question. The name of the question group is shown in grey, the average of the answers is represented by a blue dot, while the actual value of it is shown on the right-hand side. Note that the higher the score the better the result is, with 4 as the maximum score.

g.) The last figure/index is the total number of answers per options from "definitely yes" to "not at all". "Not applicable" refers to the answers, where the respondents did not want to or could not answer the given question.

6.1.3 How to use the results?

Individual results show participants their score in 7 different domains and their overall score. Each participant can only see their own outcomes and following this will receive tailor-made motivational content. Participants can also talk about different activities they prefer to perform for a higher level of engagement.

Institutional results show the entire school-staff their summarized status – in a Workshop (next process) including activities to boost engagement respectively and how to get rid of institutional obstacles.

6.2. Workshop

Workshop is the core process towards increasing good communication, openness, acknowledgement etc. that finally lead to more engaged and more contented staff.

6.2.1 Goal of the Workshop – defining scope

Based on the outcomes of the questionnaire and its discussion with the staff, an action plan for the institution has to be unanimously decided.

6.2.2 Proposed agenda of Workshop

Information and discussion about the general outcome – positive aspects first.

Brainstorming on possible changes – collecting all proposals. Sequencing of proposals due to feasibility, urgency, costs and prospective outcomes. Decision about the selected proposals and definition of their measurability. Assigning milestones to each proposal.

6.2.3 Preparation of Workshop

- Team setup
- Communication
- Determination of required tools

The key to a successful Workshop is careful preparation: choosing the right moderator acceptable to the majority of the staff supports a smooth process. A well-prepared leader will have a presentation of the outcomes which emphasize positive outcomes and with initial suggestions to improve weaknesses. Defining the main communication guidelines assures transparency and goal-oriented discussions.

6.2.4 Required skills for Workshop moderator

The moderator should be able to focus on keeping the communication flow clear and accessible to all participants during the Workshop. As an information manager, they should be able to summarize an address in own words, to clear up misunderstandings etc. It is also crucial to involve all participants at least at the level of being involved and feeling part of the process.

6.2.5 How to run an efficient Workshop

A schedule, for when most participants can take part, is the initial requirement.

The invitation should express the appreciation of the leader for the participants and the hope of making a good institution even better. The goal of the workshop has to be stated at the beginning (also written). Short introductions leave more time for brainstorming and discussion. Small groups can help to increase efficiency of brainstorming and action planning. In the ideal situation, decisions about actions will be made unanimously. It is better to have some powerful actions instead of many less influencing ones. Have a definition for each action as the way of measuring its success and its milestones.

6.2.6 Determining actions as a result of Workshop

After discussing the impacts of suggested actions on the common goal, their feasibility, measurability, funding etc., an action plan will be prepared of the selected actions. It has to be

clear, comprehensive and if possible, unanimously decided. A responsible person will be assigned to each action.

6.2.7 Follow up of actions

Actions are monitored by the responsible person: milestones on schedule, palpable outcomes, in case of obstacles communication with the leader of the institution. At the end of an action an evaluation meeting is recommended and the sharing of the experiences of the action with the staff.

6.3 Outcomes

The diagnosis of the organization according to the results of the questionnaire is based on the four categories that are assigned to participants.

6.3.1 Explanation of the Categories

According to the given answers each person's profile can be virtually summarized in one of the following categories:

1. Orientating
2. Enthusiastic
3. Engaged
4. Exhausted

See detailed description in 3.2.

6.3.2 Possible hypothesis by the 7 aspects of engagement

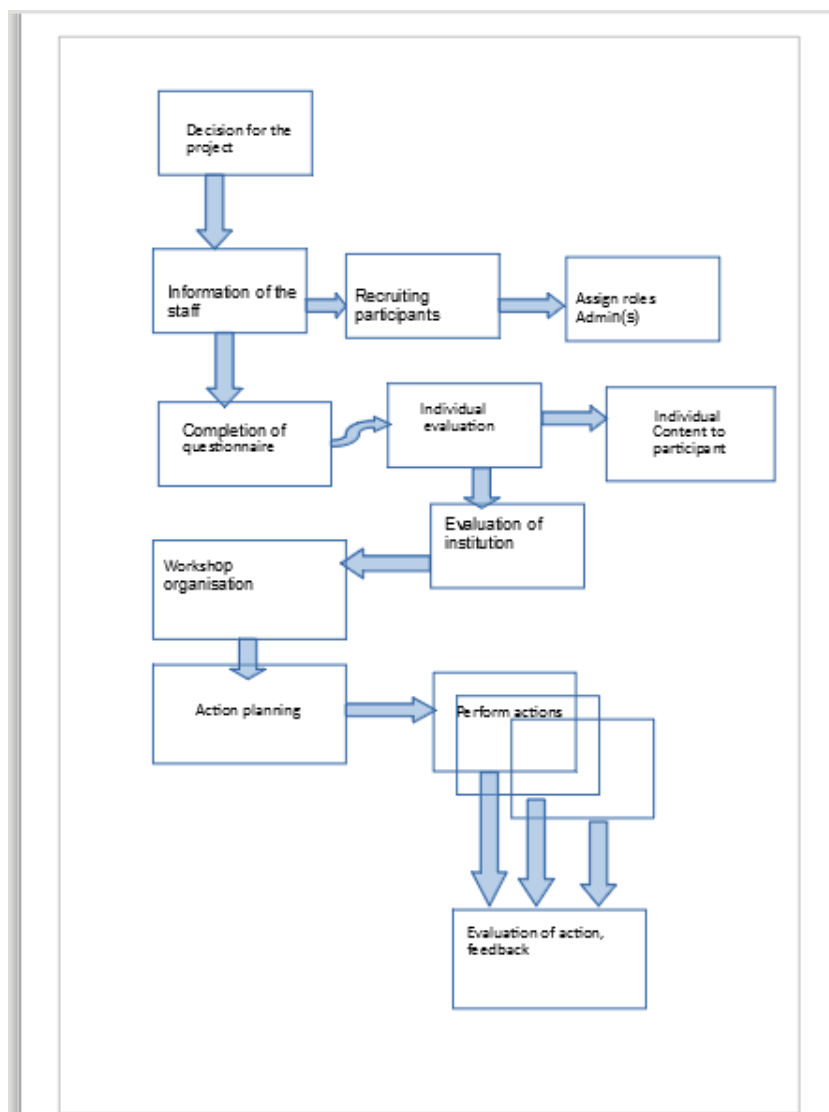
These aspects are an approach to describe the main needs of people – an extended version of the well-known Maslow's pyramid that contains the following 5: physiological needs, safety and security, love and belonging, esteem and self-actualization.

The additions to these 5 are cognitive needs and higher (social) good.

As described in point 3, within the Questionnaire all 7 aspects are checked, so it is a useful tool for individual personality development by improving one's self-knowledge.

Note that: even though Maslow's theory has been criticized, the needs described by the theory are well aligned with the practice.

6.4 Process description: process flow chart



6.5 Motivational Contents

- These contents will be available under the Self Development Tools menu point. This will be unlocked only if the Questionnaire has been completed.
- When a given content is proposed, please add a Topic and a Teaser: this will be the trigger for colleagues to watch/read/complete a content.
- Motivational contents should be nation specific.
- Examples are available at Appendix.

6.6 Gamification

After the survey, the total scores given by each respondent are formed. (Total score: the sum of the points obtained from the answers to each question). With this in mind, four categories emerge. (Remember, these categories are: Orientating, Enthusiastic, Engaged, Exhausted.)

Each category may receive different motivational content in the weeks/months after the survey is completed. The frequency of posting can usually be weekly or fortnightly, the point being that it is neither too frequent (risk of disinterest) nor too infrequent (the degree of involvement decreases).

Some examples of postable materials are given in the Annex, but it is important to emphasize that this may vary from country/school to school, depending on local needs.

Gamification levels.

There are 7 levels in the gamification process. The participant proceeds from the entry level once he or she has completed the survey. He then enters the Enthusiastic level. At the Enthusiastic level (and so on at the next 3 levels) there are grades (1,2,3) that one attains when one has viewed a motivational content AND given feedback on its usability. So, to step further to the next level it is needed to provide feedback.

If you have viewed all three contents and provided feedback, you can move on to the next level (e.g., from Enthusiastic level to Team Member level.) The last level is the Arrival level.

Names of the levels are:

Newcomer

Enthusiastic 1,2,3

Team member 1,2,3

Expert 1,2,3

Builder 1,2,3

Committed 1,2,3

Arrival

Under each level (just under the badge icon) one can see how many points are needed to reach the next level.

It is up to schools to give each level a tangible reward, such as the opportunity to have a personal lunch with the school principal/head teacher (this can easily be inspiring for larger schools) or one year of free parking close/within the school (for example, if there are few parking spaces near the school). The point is that we can assign rewards to the levels (creative, different from the usual ones) that provide additional motivation to the participants in the survey.

In this way, interest is sustained and content that management considers important reaches teachers. We emphasize that this content should not be too didactic, as this may cause disinterest after a while. The goal is to increase engagement through involvement in the gamification process.

Each participant can see exactly what level they are at. The actual level can be seen on the left side of the entry screen. Clicking on the info button (see below) the actual badge the additional (still attainable) badges will appear.



In every case, participants have the option to provide feedback on the material they have read, this will increase the XP points and the next level can sooner be reached.

Here below, you can see some of the badges for level 1. On each level, the colour of the badges differ.



7. Evaluation and interpretation of results

Once the survey is complete, the results will be available online. The results can be viewed online. During the project, there was a need for the results to be available in a printable format as well. Because Moodle does not allow you to print results directly, we have developed an Excel-based solution. The results can be downloaded by pressing the download button, which saves the results in text format. This txt file will be processed by an Excel program developed for this purpose.

Open the Excel file. Four different language options will appear. Select the flag that represents the appropriate language. Then enter the name of the file with the 'txt' extension, this file will be processed. The program automatically performs the processing and makes it available in a printable format.

If you want to compare two results from the same institution at different times, you can do so. Following the instructions of the Excel program, comparative processing will be performed. This shows exactly what (hopefully positive) displacement occurred between the two measurement points, e.g. at the beginning of the project and, say, three months later.

Generating a report

THIS FUNCTION IS AVAILABLE ONLY FOR THE COUNTRY COORDINATORS AND NOT FOR SCHOOL PRINCIPALS!

Their names and level of access to data are as follows:

EN.Superleader

DE.Superleader

HU.Superleader

PL.Superleader

These persons can see all results of their countries, but not the other countries!

Upon completing the survey you will be interested to see the results. This can be done by using the online surface, where all results will be displayed.

If you want to get an offline report in pdf format, please follow the steps described below.

After entering the portal you can see the results of the survey. Make your choice of which organization you are interested in.

[Home](#) > [My courses](#) > [Erasmus Engagement and Beyond](#) > [Engagement level test](#) > [Engagement level test v1.5](#) > [View All Responses](#) > [View Default order](#)



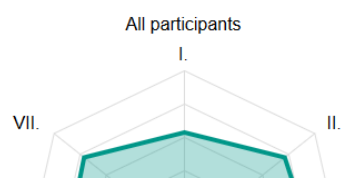
Newcomer
0thP
100th to go

[Preview](#) [View All Responses](#)
[View Default order](#) [Download in text format](#)

Separate groups

[View All Responses. All participants.](#)
[View Default order](#)
[?](#) Responses: **468**

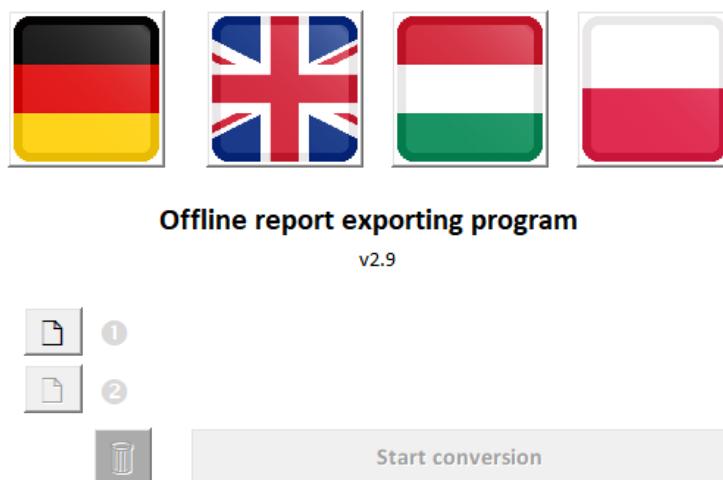
All participants



Now, choose the „Download in text format” option.

This will result in a text format report. On having this, start the „ Report generator v2.9.xlsm” program (this is an Excel macro program).

You will see the following screen:



Choose your language.

By pressing the file No. 1 icon button you can import the previously generated txt file. Now, press the „Start conversion button”. The generated pdf-form report will be saved in the same directory from where you imported the txt file.

If you have two reports to be compared, press the file No. 2 icon and press the „Start conversion button”. The generated pdf-form report will be saved in the same directory from where you imported the txt file.

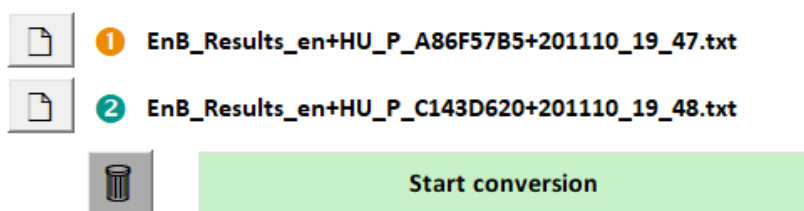
Since it is important to see the progress of an organization, i.e. the changes between two dates (say once you have run the survey at date1, then you have made actions in the given organization and want to see progress, so you run the survey again at date 2) so you can make a comparison.

For this purpose, select two files. The first file contains the starting results (date1, file No. 1 icon), the second file the results of the second (date2 file No. 2 icon). As you can see below, we compare the results of two surveys. (This can either be results of two schools, or the results of the same school from two different dates).



Offline report exporting program

v2.9



The conversion and the results will be generated automatically.

Below you can see the two results shown on the same radar diagram in different colours:

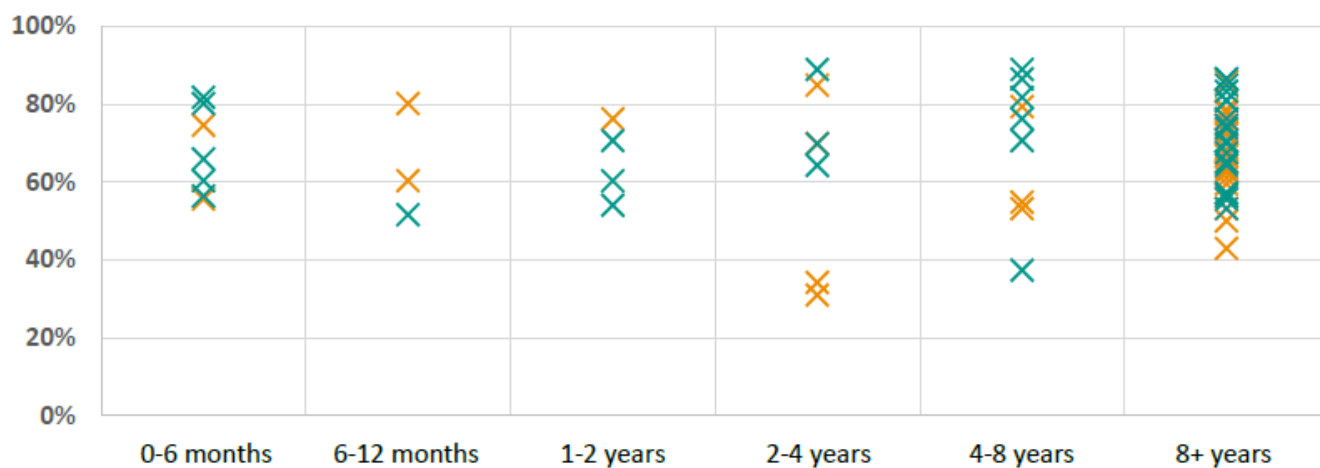
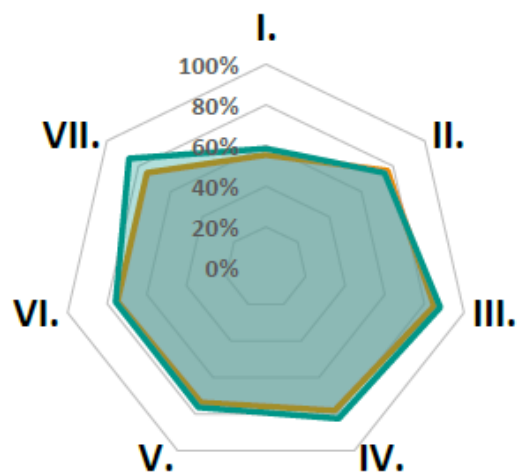
The same visualization will be shown on all of the charts presented by the report, so you can see the change (hopefully a progress) from date1 to date2.

The difference between the two data points (starting point and 3 months later) is clear. As a result of the efforts, the second measurement (green data and green line) is significantly higher versus the first data point, shown in yellow.

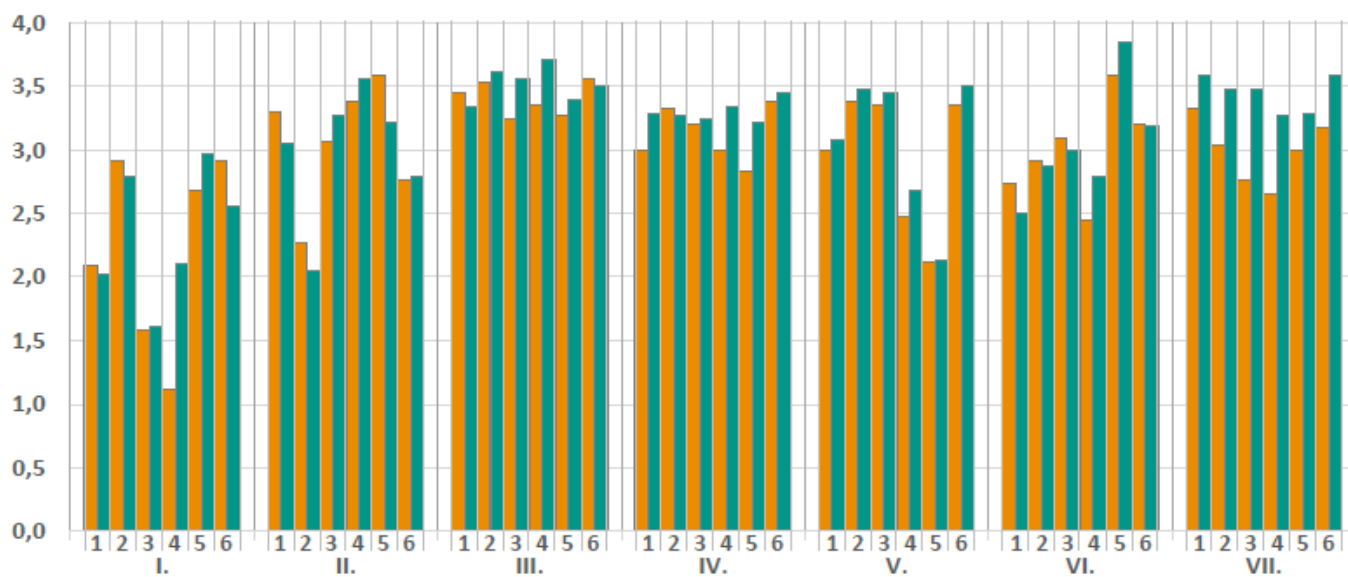
Question group

Average values

	1	2
I.	55%	59%
II.	76%	75%
III.	85%	88%
IV.	78%	82%
V.	74%	76%
VI.	75%	76%
VII.	75%	86%



Changes can also be perceived between the two data sets depicted on the barchart.



Results by questions can also be compared.

I. Question group

1. Outside of work I have adequate free time to take care of my own well-being.

definitely yes	rather yes	rather no	not at all	not applicable	Σ	$\bar{X}$
0	8	21	5	0	34	2,1
0	10	19	9	0	38	2,0

2. Working conditions in my organisation are good from a health point of view.

definitely yes	rather yes	rather no	not at all	not applicable	Σ	$\bar{X}$
5	21	8	0	0	34	2,9
7	18	11	2	0	38	2,8

8. Roles

- National coordinator
A person who is charge to coordinate all activities within the country related to the current project. He/she provides necessary information for schools running the surveys. NOTE again that, within the system, their names are as follows (by countries): EN.Superleader, DE.Superleader, HU.Superleader, PL.Superleader

These persons can see all results of their countries, but not the other countries!

- Project Initiator / Project Leader
The person responsible for the project within the organization.
- Project Members (participants)
Those teachers and technical support colleagues who are taking part in the survey.
- Workshop moderator
The person responsible for facilitating the Action planning workshop within the organization.
- Workshop team members
Those persons nominated by the project initiator who can significantly contribute to the outcome.
- External Consultant
Can be a person dedicated by the Project initiator and not working for the given organization.

9. APPENDICES

E&B Portal User Handout

Short description

EnB Portal uses Moodle 3.4 + version, which uses a uniquely modified version of the freely available "Questionnaire" module. The portal is available through ConnectConsult's leased storage via an encrypted data link (SSL). In case there would be any difficulties to enter the portal please consult your National coordinator!

Available: <https://enbportal.connectconsult.hu>

To enter it, a username is needed. The portal has no public page that can be viewed without a valid login.

The public information website on the EnB project is available at <https://engagementandbeyond.connectconsult.com>.

The user names required for signing in are distributed by members of the portal administrators during the project, which ensures the participant's anonymity. Each user is assigned to different roles, and they will see different contents according to their roles.

The portal contains only one personal e-mail address per user, which is crucial from the viewpoint of the basic functions of the system (e.g. forgotten password or sending periodic reminder messages). For full anonymity, it is recommended that the users create new e-mail addresses used exclusively for project purposes, and do not contain personal information.

User roles on the portal

The portal users are basically the members of the staff of the participating institutions, the leaders of the institutions, as well as those who are delegated by the organizations involved in the implementation with an administrative role.

Name of the roles:

- EnB Teacher (participant of the project, teacher of an institution)
- EnB Technical (participant of the project, technical staff of an institution)

- EnB Leader (participant of the project, leader of an institution)
- EnB Administrator (administrative staff from participating partner countries)

NOTE that, on national level, there can be persons nominated to coordinate several schools' activities. They are Superleaders in each countries (EN, DE, HU, PL) currently. If any other countries request such roles, please contact us.

Role assignments and user IDs encoded to users are created independently of the portal under an external procedure by ConnectConsult. To do this, ConnectConsult collects the data of the people involved in the project using a predetermined Excel format data query.

The portal automatically sends e-mails to users' registered e-mail addresses with all the information required for access (portal availability, encrypted user name, and password for first login) after the bulk creation of user accounts. After receiving the initial information letter, users log in to the portal and change their passwords. After entering, users will have access to the contents of the portal.

Structure of the portal

According to Moodle-terminology, the EnB portal stores all the information in a single course named "Erasmus Engagement and Beyond". The course is divided into several themes, and topics will be automatically accessible to the participants during the progression progress of the project.

The themes of the course are the following:

- General information
 - o A general description of the project, the importance of measuring engagement and the role of self-developing tools
- Measuring engagement
 - o This part contains the questionnaire consisting of 42 questions in 7 different question groups, where answering each question is mandatory. This part contains the following details:
 - ☐ how long does the respondent work for the institution
 - ☐ permission notice for data handling and participation in the project
 - ☐ I-VII. question groups with multiple choice questions, where each question has "I do not know / I do not want to answer" as options, as well.
 - o The engagement questionnaire can only be filled out once per participant. This is due to the fact that the questionnaire is filled in anonymously, and the answers cannot be identified with the user, so correction of the answers is not possible.
 - o The questionnaire can be completed as EnB Teacher, EnB Technical or EnB Leader, but some questions may be different in the questionnaires of the different roles.
 - o After completing the questionnaire, participants will automatically receive a score according to their answers, and their arithmetical average gives the total score for the questionnaire i.e., „engagement level".

- o EnB Teacher and EnB Technical users can see their own answers and the scores calculated from their responses by a questionnaire in a tabular and radar-graph form visualized after completing the questionnaire.
- o Users in the EnB Leader role can view their own responses as participants in EnB Teacher and EnB Technical, but they can also see statistics that include aggregate responses from their institution's participants with the following data:
 - average scores per question group in chart form,
 - average score points per questionnaire, depicted on the radar chart,
 - a scattergram describing the dispersion of the respondent's engagement level and the correlation between the time spent working in the institution, where data in each time span are depicted by the following:
 - If there is no data in a time span, it will remain blank with white background colour,
 - If there are very few (1-2) data in a time span, the time band will be slightly red in colour to indicate that there are data in that time span, but it is not shown due to anonymity,
 - If there are few (3-5) data in a time span, instead of depicting specific commitment level values in the time band to avoid the possibility of identifying the individuals, their average value is displayed as a single red average score,
 - If there is a sufficient number of data in a time span (6 or more data points), the data scores of the specific commitment level values will appear in the form of a green dot,
 - Detailed statistics on the distribution of responses and the average response value by each question.
- o If an EnB Leader user has a leading role in more than one institution, they can see separate information about each of their institutions and choose which one they want to display.
 - Self-Development Resources and Tools
- o The thematic unit of self-development resources and tools will only be visible to users who have completed the engagement questionnaire and have received an automatic score.
- o Access to individual self-development resources and tools can be defined on the basis of the level of engagement. In case of each material, it is possible to set the score-range from which participants can have access to.
 - The measurement of the change in engagement
- o As a final step of the project, the participants will once again fill out the same engagement questionnaire in order to check the change of engagement and the effectiveness of the self-development resources and tools.
- o Each participant can see his/her response to the initial and final questionnaires and evaluate their commitment level change for themselves.
- o EnB Leader users can track their institution's change in the average engagement level, but cannot see the change of each teacher's result in their institution.

9.1 List of questions of the questionnaire

Basic needs

Besides my work I can have adequate resting time.

Working conditions are acceptable in my school from health point of view.

My salary is acceptable as of today.

Besides my salary, I receive other kinds of benefits.

I get enough technical support to do my job (like equipments, projectors, internet access...).

My school provides me with the means (like acceptable building, classroom, personal area) to meet my goals

Safety needs

I feel that my job is secured in three years' time.

Personal life and professional life are adequately balanced.

Rules governing the organisation are transparent and the organisation operates accordingly.

I understand what my superiors expect from me

I was given adequate support from my colleagues in the first year of my work.

My work environment is such that I able to provide adequate support from my students.

Belonging

When I need help, there are people within the school who can help me.

My superior has an appropriate attitude when asking me to do something.

I can share my knowledge with my colleagues when appropriate.

We hold regular meetings within the group/team I am part of.

My colleagues appreciate my contribution to the work of my group/my department.

I am part of a team with whom I can perform my job to a good level.

Esteem

I regularly evaluate my own professional performance.

I am motivated whenever my colleagues appreciate my achievements.

My superior duly considers my opinion.

I get regular positive/constructive feedback from my superior(s).

My superior(s) evaluate my job according to my real performance.

With my colleagues we mutually appreciate the job we do.

Cognitive

I am able to access current research or training programs to help my professional development.

I know exactly what my professional goals are.

I can identify with the pedagogical goals of my school.

If you had the chance, I would introduce some new practices/methods at my school.

I would take part in a mentoring program (either as a mentor or as a mentee).

I receive all realistic support from my superior to achieve my professional goals.

Self actualization

By doing my job, I not only earn my living but that contributes to my higher goals, too.

I am satisfied with my decision to be a teacher.

My job offers me the opportunity of personal growth.

I have influence on the decision of the organisation.

I am motivated by the progress of my students.

I feel positively challenged during performing my job.

Higher (social) good

Generally I am proudly represent my school to the society.

The work I do, contributes to the personal advancement of my pupils.

Pupils learning in my school will be acknowledged contributors of the society.

Pupils learning in my school will spread the goodwill of my organization.

I would recommend my organisation to work at for those who are close to me.

I would recommend my school to my friends' children to learn at.

9.2 Motivational Contents – examples

These contents can be TED Talks, TEDx Talks, movies from Youtube, short readings from the internet that are relevant for the teachers and help their everyday job. These contents can be sent by mail or uploaded to a common drive. The final goal is to find any kind of contents that are relevant for a teacher and provides him/her some motivation/inspiration.

Here are some motivational content examples:

https://www.ted.com/talks/rita_pierson_every_kid_needs_a_champion?language=en

https://www.ted.com/talks/aimee_mullins_on_running

https://www.ted.com/talks/derek_sivers_how_to_start_a_movement

https://www.ted.com/talks/margaret_heffernan_why_it_s_time_to_forget_the_pecking_order_at_work

https://www.ted.com/talks/alain_de_botton_a_kinder_gentler_philosophy_of_success

https://www.ted.com/talks/sue_austin_deep_sea_diving_in_a_wheelchair

https://www.ted.com/talks/eric_whitacre_a_virtual_choir_2_000_voices_strong?language=hu#t-415111

https://www.ted.com/talks/salman_khan_let_s_use_video_to_reinvent_education

<https://www.youtube.com/watch?v=vnEf8z1aZns>

<https://www.youtube.com/watch?v=TQMbvJNRpLE>

https://www.youtube.com/watch?v=q4TJEA_ZRys

https://www.ted.com/talks/jim_hemerling_5_ways_to_lead_in_an_era_of_constant_change

https://www.fastcompany.com/90200879/creative-burnout-is-inevitable-heres-how-to-beat-it?utm_source=postup&utm_medium=email&utm_campaign=Fast%20Company%20Daily&position=6&partner=newsletter&campaign_date=07122018

<https://www.hrportal.hu/hr/tippepek-hogyan-novelje-dolgozoi-elkotelezettseget-20101111.html>

<https://www.nyest.hu/hirek/ilyen-a-jo-tanar-legalabbis-papiron>

<https://www.hrportal.hu/hr/10-tipp--hogy-a-visszajelzes-valoban-mukodjon-20180912.html>

<https://www.hrportal.hu/hr/vezetokent-szarnyalni-csak-masokat-emelve-lehet-20170726.html>

<https://www.hrportal.hu/hr/van--amikor-a-huseg-csak-kenyelmesseget-takar-20160824.html>

https://www.ted.com/talks/adam_grant_are_you_a_giver_or_a_taker#t-433799

<https://wmn.hu/ugy/49647-ha-jonak-latjak-a-gyerekeket-jok-is-lesznek--szellel-szemben-az-elmenykozpontu-oktatassal>

https://www.ted.com/talks/kelly_mcgonigal_how_to_make_stress_your_friend?language=hu

10.FAQ

1. How will data-security of the questionnaire be ensured?

After receiving a user-name at the first log-in you have to change your password. You have to keep the password in a secure place, as it is not known to anybody else. Nobody else can access your account. Your inputs will be evaluated anonymously. Your colleagues and manager will never see your answers.

You receive a user name from your leader. Once you register in the system the first action that is asked from you is to change the password. From this point your identity is secured. Remember! Keep the password in a safe place since you can not ask to reclaim a lost password! This is because neither your leader nor the system administrator will know it – so all your actions in the system remains anonymous.

2. Can I change my password?

After the first log-in when you change your password, you can change it any time again.

3. How to proceed in case of forgotten access information?

You have to ask the administrator for another user name and start the procedure again from the beginning.

4. Can I compile the questionnaire more than one time?

No. For the sake of accurate data collection it is not allowed for somebody to enter data more than once.

5. Shall I answer a question even if it doesn't apply for me?

You have an option among the answers for this case, so you choose this.
I don't know / I don't want to answer

6. How can I see the overall outcome?

You see your own outcome when you have completed the questionnaire. Nobody can see the detailed answers of others. The leader will see the overall (summarized) outcome in the report and will share it with the participants, but without personal references.

7. What happens after the compilation of the questionnaire?

For the leader the results will be available after all participants have completed the questionnaire ("View all responses" section). Based on these summarized results the action planning workshop will be organized. After performing the actions a new survey will be started with the same participants to see the impact of the actions on the overall engagement level.

From the perspective of the leader: when the survey has been completed and all respondents have submitted their responses, results will be available under the „view all responses“ section. Based on these results a workshop is advised to be run and actions be taken in order to improve engagement. After a certain period, the survey should be repeated so the changes can be seen. To assist organizations to evaluate the progress we provided a separate report generator and comparator program that helps interpretation of the results.

For the teachers it is an important aspect that they see the overall outcomes and – hopefully – experience a positive change due to the actions performed.

From the perspective of the employees/teachers: your responses, together with responses of the others will be presented by the system in a form of a report that does not allow identification of individuals. Leaders will use the results to improve the operation of the organization, so you will experience a positive change within the organization.

8. What happens to my personal outcome?

Only you can see your outcome after completed the questionnaire.

All outcomes will be summarized in the report generated, without the possibility to see the individual outcomes for anybody else.

A report from all responses will be generated. Your personal data will not be identifiable in any ways. The goal of the survey is to improve the operation of the organization.

9. Will my manager know my personal results?

No, there is no way to trace your answers. This is ensured by the above mentioned password change and also by the method of data presentation within the final report.

10. Can I quit the project after compiling the questionnaire?

You can quit any time, but it is better to make the decision for/against participation before the project starts. The evaluation is followed by a workshop to define activities that will improve the overall engagement of your institution.

11. How does the online support work on the practical level?

The motivational contents sent to you aims to help you feel better, get new information and as a consequence raise your level of engagement for the school.

12. Can I compile the questionnaire without participating in the following online support (i.e. motivational contents)?

Yes, you can. There is no obligation to proceed with any additional activity.

13. How can I stop motivational support, if I'm not interested getting it anymore?

You only have to complete the questionnaire, all additional activity is optional.

The only task you have is completing the survey. Once you have done this, there is no obligation and there is the option to continue with any additional activity.

14. If I quit, does it have any consequences? Will my manager be informed about it?

No, there are no consequences except you lose access to the motivational content. Your manager will not be informed about it.

15. Who will participate on the workshops?

The Project initiator / school leader decides – it is best to invite all participants, if possible. The “influencer” should absolutely participate.

It is up to the organiser of the workshop who is generally the leader / school principal together with those colleagues who have a say to shape the practice / processes of the given school.

16. How far is my privacy protected during evaluation and discussion of outcomes ensured?

Private data are always anonymous, during the project and after it is finished.

All private data are totally anonymous, school principal has no access to them neither during nor after the project.

17. Is it compulsory for me to participate on the workshop?

No, it is an option only. If you are the school principal it is highly recommended to participate since the goal of the whole project is to develop the organization – that can not be done without the school principal. If you are not part of the school management, it is up to your school principal and yourself whether you participate or not

18. Is my manager always present during evaluation?

The presentation of the evaluation report is the first step of the action planning workshop. Of course the school principal, as the responsible person for improvement of the organization, should be present.

Data, in an aggregated form (not individually) will be seen by the school principal. The only aim of this project is to assist the school principal to develop the organization – not the individuals. He/she does not have access to individual data in any ways.

19. How relevant are the discussed necessary handling strategies?

The relevance of them depends on the management and the participants, what weight will be assigned to the strategies agreed at the workshops.

20. Is it compulsory for my manager to follow the agreed handling strategies?

No, it is not compulsory, but highly advised since he/she is responsible for developing the organization

21. How far will the E&B team support our school in the future?

As default, this support will run automatically till the end of February, 2021. After that you can ask for such a support on a case-by-case basis from your national coordinator.

22. What about the target agreements after the end of the project?

It is highly recommended to follow them, respectively to repeat the whole procedure whenever it seems to be necessary to boost the engagement level of the school staff.

You (the school) is free to do or do not follow the agreed action points. But, remember, this project is about improvement. Why wouldn't you use the agreed points that may help improving the organization. It is your interest in the first place not others. An improved organization is superior over a static one.

23. Whom can we contact after the end of the project?

You can contact your national coordinator who will provide support or suggest other alternatives. Rest assured, you will get support after the project is officially terminated.