**GRID 3 - MONITORING AND EVALUATION OF PROGRESS**

**IN THE PROFESSIONALIZATION PATHWAY**

*The following grid is designed to monitor and evaluate a learner's progress in achieving a personalised training plan.*

**MONITORING DETAILS:**

|  |  |  |  |
| --- | --- | --- | --- |
| Date |  | Assessor’s Name |  |

**LEARNER’S DATA:**

|  |  |  |  |
| --- | --- | --- | --- |
| Learner’s name |  | ID |  |
| Phone number(s) contact |  | **email contact** |  |
| Company name |  | **Company ID** |  |
| Company address |  | | |
| Site address |  | **Professional category** |  |
| Type of work in progress |  | | |

**COMPANY TUTOR:**

|  |  |  |  |
| --- | --- | --- | --- |
| Tutor’s name |  | ID |  |
| Phone number(s) contact |  | **email contact** |  |

**GUIDELINES FOR MONITORING SESSIONS:**

**Monitoring sessions can take place either directly in company, by observing work situations, which is particularly ambitious and not always feasible, or as interviews, which is more based on declarations than observations. Nevertheless, this second solution seems more realistic considering real possibilities that any trainer or evaluator possesses.**

If they are experienced and/or professionally trained, the site managers and team leaders must be able to "see far" by foreseeing the evolution of the production processes at renovation worksite, by controlling and organizing work, as well as dealing with real and potential difficulties, including health and safety on renovation sites, as well as unforeseen events that occur during the work.

The proposed concept for monitoring and evaluating individual progress is NOT based on the evaluation of TRAINING MODULE OUTCOMES, but on the FOUR MAIN FUNCTIONS (**Provide, Plan, Control & Organise**) that structure the activities entrusted to site managers and team leaders on the renovation sites

After using ***Grid 1 for the Observation of activities of worksite managers and team leaders in a renovation company***, as well as after the identifying of the individual needs with ***Grid 2 for the Positioning of the learner in the learning pathway***, it is possible to make a link between these two first steps of the preparation of learning process and the further monitoring phases.

The advice we offer must be adapted to the contexts of each partner organisation, as it is not intended to be applied as is. For example, each organisation must decide how many evaluation phases it plans, depending on the length of the training process, the degree to which the process is broken down into partial objectives, the availability of the trainers assigned to follow-up, etc.

THE PROCESS

The learner (site manager or team leader) is evaluated by asking questions and the form is filled in (one or several times) by attributing a number value to the activities reporting within the same and take as good what the site manager / team leader (on duty or future) tells the assessor (or what the assessor observes if (s)he goes to the worksite/workplace. It must not seem like an exam, and the assessor must complete the grid below by searching a consensus, which will also help the trainers to adjust the training. Thus, the grid should not be filled in completely together with the learner, but it also can be complemented after the interview.

***Evaluation scale:*** If (s)he performs such an activity with autonomy and competence, the assessor ticks 4, if he does it little or in any case in subordinate collaboration, the assessor ticks 1, if he does not do it at all or has no competence in this activity, nothing is ticked.

***In other terms,*** If the site manager / team leader performs them well and autonomously we assign the value 4, if he does it well but not independently we assign the value 3, if he does it not well we assign the value 2, if he has only little knowledge and does it poorly we assign the value 1, if he does not have competence in those tasks and does not carry them out, no evaluation should be reported.

It is advised to repeat this process several times during the training period, either by asking questions or by observing the way of working. Depending on the training length, it could be repeated 2 or 3 times, each time with a new grid, which will allow the trainer to measure the progress made by the learner. The goals of this process are:

* Induce in the site manager / team leader the mental habit of thinking first in analytical terms and only at the end start doing, showing the benefits that are gained, also as satisfaction in ORGANIZING THE WORK
* Identify in the planning the fundamental tool of the manager / team leader's activity, which arises from predicting and reflecting on all known working variables, while remaining attentive to possible news and unforeseen events. PLANNING THE WORK
* Making it explicit that a good organization is such only if it crosses security, there is no "good manager / team leader" if the dimension of doing is not doing it safely. FORESEEING RISKS
* Make it explicit that the correct implementation of planning is the only guarantee of achieving the optimal result, build in quality, on time and with pre-established costs without accidents and above all without damage to workers. ENSURE FEEDBACK AND PERFORMANCE.
* Identify the usefulness of Checkings, as a tool for the successful implementation of a work process, (quality + safety). CHECKING THE WORKING PROCESS

Grid 3 is split into 4 macro-field corresponding to specific skills and activities at renovation sites. There is a correspondence between them, and the chronological activities identified within Grids 1 &2. These macro-fields are:

* MONITORING THE WORK PROCESS
* ENSURING RESPONSIBILITY AND PERFORMANCE
* FORESEEING AND PLANNING
* ORGANIZING WORK AND MANAGING HUMAN RELATIONS

Each area has been divided into tasks that the site manager / team leader must be able to do, which are also coherent with Grids 1 & 2.

Tasks mentioned in black inside the grid below derive from the pedagogical objectives reported in the IO1-A3 document (See Appendix).

Tasks mentioned in green tasks, are additional ones that can also be evaluated. Their list is not exhaustive and can be modified according to specific contexts, learner profile and needs.

***All partners are free to modify or add other tasks leaving unchanged the black ones that have already been shared and validated in the previous project phases.***

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| 1 2 3 4 |
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|  |
| Determine / select appropriate diagnostic method(s) (**1.2 B)**  1 2 3 4 |

Identifying specific situations critical to workers' health and safety

**(3.2 A)**

1 2 3 4

**PRODUCTION COSTS**

|  |
| --- |
| Identifying the critical points to be taken  into account for quality of intermediate phases and quality of finished works  **(3.5 A+ 4.1 A)**  1 2 3 4 |
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| Checking the productivity of workers and teams  1 2 3 4 |
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| Checking periodically the work schedule  and prepare «short term activity planning  1 2 3 4 |
|  |
| Identifying and collect documents specifically related to renovation projects **(1.1 A)**  1 2 3 4 |

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| Identifying quality criteria and develop specific control procedures for quality of intermediate phases and quality of  finished works **(3.5 B)**  1 2 3 4 |
|  |
| Checking the qualitative and quantitative  congruence of incoming materials with order/delivery documents  1 2 3 4 |
|  |
| Monitoring deviations from the work schedule and reviewing time and resources  1 2 3 4 |
|  |
| Analysing data and identifying critical points of the site (**1.1 B)**  1 2 3 4 |

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| Checking for works not included in the contract  1 2 3 4 |
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| Identifying Collect and Integrate administrative, financial, and legal documents specifically related to renovation projects (**3.1A + 3.1 B)**  1 2 3 4 |

**M ONITORING THE WORK PROCESS**

**TIME**

**DOCUMENTS AND STATUS OF PLANNED SECURITY**

|  |
| --- |
| Ensuring that the work carried out  corresponds to that provided for in the descriptive documents: terms of reference guideline  1 2 3 4 |
|  |
| Identifying specific situations for the  energy efficiency **(3.4 A)**  1 2 3 4 |
|  |
| Ensuring incoming quantity correspondence with orders and activity programme |
|  |
| Identifying the current standards or regulations for the Waste Management **(3.3 B)**  1 2 3 4 |

**PROJECT**

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| Determine / select appropriate diagnostic method(s) (**1.2 B)**  1 2 3 4 |
|  |
| Identifying specific situations for the Waste  Management **(3.3 A)**  1 2 3 4 |
|  |
| Ensuring that the work carried out corresponds to that provided for in the reference documents  1 2 3 4 |
|  |
| Ensuring compliance with current rules or regulations for the health and  safety of workers (**3.2 B)**  1 2 3 4 |

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| Develop the necessary control procedures for quality control of renovation results **(4.1B)** |
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| Identifying the current standards or regulations for the energy efficiency **(3.4 B)**  1 2 3 4 |

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| Ensuring that the work carried out corresponds to that provided for in the descriptive documents: terms of reference guidelines |
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| Ensuring that the performance of the executed  to what is foreseen in the contract  1 2 3 4 |

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**SPECIFICS**

**ENSURING**

**COMPLIANCE AND PERFORMANCE**

**PROCESS**/

**SPECIFICS**

**MATERIALS AND**

**COMPONENTS**

**PERFORMANCES**

**WORKS**

|  |
| --- |
| Identifying the different diagnostic procedures/methods/techniques possible in renovation projects (**1.2 A)**  1 2 3 4 |
|  |
| Determine the diagnostic methods to be used and the possible materials  required **(1.3 B)**  1 2 3 4 |
|  |
| Identifying and quantifying the tools and the machinery to be used, by analysing the graphic and descriptive drawings of the work  1 2 3 4 |
|  |
| Determine the diagnostic methods to be used and the possible contributors required (**1.3 B)**  1 2 3 4 |
|  |
| Integrate the specific elements of  renovation into the design and layout of intervention sites. **(1.4 B)**  1 2 3 4 |

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| Analysing the critical points and propose the necessary solutions or adjustments **(1.3 D)**  1 2 3 4 |
|  |
| Quantifying the various materials needed according to the planned activities  1 2 3 4 |
|  |
| Defining the time and manner of supply of means  1 2 3 4 |
|  |
| Quantifying the workforce to be employed, by means of analysis of graphic and descriptive drawings of the work. of the work.  1 2 3 4 |
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| Providing for the deployment and distribution over time of teams and their coordination  1 2 3 4 |

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| Anticipating possible interferences/critical issues in the carrying out several activities simultaneously  1 2 3 4 |
|  |
| Identifying the materials to be used, by analysing graphic and descriptive drawings of the work  1 2 3 4 |
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| Assigning, distributing and coordinating work, setting objectives compatible with the skills and job profiles  1 2 3 4 |
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| Identifying possible interferences/ criticalities when carrying out several activities simultaneously  1 2 3 4 |

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| Examining a work schedule to set out the activities to be carried out  1 2 3 4 |
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**RESOURCES (MATERIALS)**

**FFORECASTING**

**AND PLANNING**

**RESOURCES (MECHANICAL**

**MEANS)**

**RESOURCES (SPECIALIST SUPPLIES AND WASTE)**

|  |
| --- |
| Defining how to manage and dispose of waste materials  1 2 3 4 |
|  |
| Scheduling and carrying out periodic routine maintenance  1 2 3 4 |
|  |
| Recording hours worked for 'economies'.  1 2 3 4 |
|  |
| Develop resolution strategies and implement appropriate techniques for the energy efficiency **(3.3 C)** |
|  |
| communicating with top management to define objectives, needs/ availability, and limits of competence  1 2 3 4 |
|  |
| Evaluate the final deliverables and processes implemented and Valuing work with team leaders and teams **(4.2 A+B)**  1 2 3 4 |

**USE OF RESOURCES (MATERIALS)**

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| Requesting supplies reasonably in advance of use  1 2 3 4 |
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| Choosing, during the course of the various choosing the most suitable means of work and defining their use  1 2 3 4 |
|  |
| Checking scheduling for interferences  1 2 3 4 |
|  |
| Identifying/characterise specific elements of renovation sites **(1.5 A)**  1 2 3 4 |
|  |
| Characterise the specificities of the different protagonists of a renovation project **(2.3 A)**  1 2 3 4 |
|  |
| Identifying and characterise critical situations or problems specific to renovation sites **(2.1 A + 2.2 A)**  1 2 3 4 |

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| Defining storage and handling within the site  1 2 3 4 |
|  |
| Defining storage and handling within the construction site  1 2 3 4 |
|  |
| Assessing work productivity (employees and teams)  1 2 3 4 |
|  |
| Integrate the specific elements of renovation into the planning, procedures and phasing of interventions **(1.5 B)**  1 2 3 4 |
|  |
| Integrate these specificities in the exchanges/procedures between stakeholders **(2.1 B)**  1 2 3 4 |
|  |
| Anticipate, develop, and propose solutions  **(2.1 B)**  1 2 3 4 |

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| Applying the necessary quantitative and qualitative checking on incoming  materials  1 2 3 4 |
|  |
| Recording the quantities of use  (Hours worked)  1 2 3 4 |
|  |
| Recording hours worked in relation to individual jobs  1 2 3 4 |
|  |
| Develop resolution strategies and implement appropriate techniques for the Waste Management **(3.3 C)**  1 2 3 4 |
|  |
| Identifyinging and characterise points of attention to be considered for client approval **(4.1 A)**  1 2 3 4 |
|  |
| Informing team leaders **(2.1 C + 2.2 B +**  **3.2 D + 3.3D+3.3D+3.4D)**  1 2 3 4 |

**USE OF RESOURCES (MECHANICAL MEANS)**

**ORGANISING**

**WORK AND MANAGING RELATIONSHIPS**

**USE OF RESOURCES (MANPOWER)**

**COORDINATION OF RESOURCES (SPECIALIST SUPPLIES)**

**MANAGING EXTERNAL STAKEHOLDERS**

**LEADERSHIP MANAGEMENT**