GULL user guide
Internalizing and Localizing the GULL action learning system:
<u>A resource for organizations that use the GULL system in multiple locations</u>

About this resource

This resource is provided to organizations that use the GULL system in multiple locations. Prior to distribution of this guide, a lead representative from your organization will have affiliated with GULL on behalf of the entire organization. The aim here is to enable local representatives to familiarize themselves with the general requirements, responsibilities and options for using the GULL action learning system. Your own organization will augment this guide with specific policies and procedures for local operations.

Online briefing for local teams

Please familiarize yourself with GULL's mission, mandate and on-going work by reading or viewing the online briefing resources at: <u>http://www.gullonline.org/affiliate/</u>

	Section:	Resource:	Purpose:
1	About	The GULL story (parts 1-3)	Provides an overview of GULL's mission.
2	News	News Archives	Illustrates GULL's work. Read 'Annual News Highlights – 2010' (or later) and then browse through the archive.
3	Media	Press & TV – Television	View 'Beaches Employees Graduation', 4 News, 10 March, 2009 for a concise overview of GULL's offer to the community and the workplace.
4	Media	Press & TV – Press & Newspapers	Browse the press and newspaper archive.
5	Media	Briefings & Events – Briefings	View 'Changing education paradigms'. Sir Ken Robinson talks about the need for alternative approaches to learning.
6	Media	Briefings & Events – Briefings	View: 'Reg Revans, USA' and read 'A profile of Reg Revans' for a background briefing on the process of action learning.
7	Case Studies	Community & Workplace	Read and view at least one of the example case study applications to learn more about the many ways in which the GULL system can be utilized.
8	Recognition	Statement of Recognition Status of GULL Endorsements	Carefully review these documents. GULL is recognized in perpetuity by one Government (via a Statement of Recognition) and endorsed by other Governments, Leaders and Institutions.
9	Officers	Honorary Officers Executive Officers	GULL is led by regional, national and user organization-based honorary officers so as to ensure that local needs are identified and met in accordance with local traditions, culture and languages.
10	F.A.Q	Frequently Asked Questions	Conclude your review by reading the FAQ resource so as to ensure that you understand what GULL is – and isn't!

Thank you for taking the time to complete the online briefing.

Contents

The GULL user guide outlines and expands on the resources that are provided in the 'Affiliate' section at the GULL website. As noted above, a lead representative from your organization has already completed the affiliation process, but local representatives must also familiarize themselves with the following:

Section 1: Affiliate with GULL – outlines GULL's ten point code of practice, the basis of the affiliation process.

Section 2: Getting started - outlines how to link the expected outcomes of your training and other kinds of development activity to GULL's professional certification system.

Section 3: Impact tracking – GULL provides an online tracking, review and corrective action (TRACA) system with reporting formats that are easy to follow and use. TRACA uses a quarterly self-review format so that GULL system users can track their own progress and identify their own variances for corrective action.

Section 4: Localizing GULL – outlines the key issues relating to local use and ownership of the GULL system.

GULL

Section 1: Affiliate with GULL

Organizations affiliate with GULL by completing the online GULL affiliation form (outlined below) or alternatively, via written correspondence with the appropriate GULL officer (President, Regional President or National President). You can view the list of GULL affiliated organizations at: http://www.gullonline.org/affiliate/affiliate-with-GULL/

GULL affiliation form

The Global University for Lifelong Learning (GULL) aims to build and sustain network relationships founded upon shared values. To guide entrepreneurship and innovation and to assure the integrity of its work in every location, GULL's officers, affiliated organizations and their representatives must commit to and adhere by GULL's code of practice. Its purpose is to protect the integrity of GULL in all community and workplace locations. By completing the GULL affiliation form you and your organization are committing to:

1. **The vision** - GULL's statement of recognition in perpetuity is the basis of its mandate and its core mission is to enable participation by the low paid, disadvantaged groups and in economic terms, the poorest - as soon as the basis for cost recovery has been secured in any given location. Note that GULL does not seek to emulate or compete with academia. Furthermore, GULL does not claim to 'educate' – it provides a system for facilitating, recognizing and certifying practical, professional, holistic learning at work and in the community – on a lifelong basis.

2. **Accuracy** - Openness, transparency, honesty and integrity so as to represent GULL in the best possible way at all times and to uphold its status, source of recognition and endorsements. In all matters, the key reference source is the GULL website at www.gullonline.org The 'Recognition' section contains the original statement of recognition and the array of endorsements offered by Governments, Leaders and Institutions.

3. **Affordable funding** –Securing on-going contributions to meet GULL's central operating costs and to funding mutually agreed travel and other expenses (as appropriate) and/or the payment of fees, linked to each certificate produced payable prior to issue. Please note: GULL's two central companies (GULL Inc. in the USA (the university awarding body is American) and GULL Ltd. (global support from the UK)) operate on a cost recovery basis.

4. **Positioning** - The integrity of GULL's professional award system, its elements and use of the correct terminology to describe its action learning process and awards. These are 'professional' (*not academic*) and 'recognized' (*not accredited*). Note also that GULL pathways and awards are *not* designed to articulate with or provide access to academic institutions and there are no circumstances in which GULL or its representatives will enter into any form of correspondence on this matter.

5. **Professionalism** - Compliance with key operating principles of the GULL system as follows: (1) Participant entry levels to professional Bachelor, Master and Doctor pathways that are aligned with the appropriate level of seniority, maturity and experience so as to secure the expected outcomes – Master and Doctor level outcomes must be 'strategic' in nature; (2) Acceptance that certificates cannot be awarded until GULL participants have gathered sufficient, verifiable evidence of learning and application to merit any given award. See also the FAQ section (GULL website) and Appendix 1.

6. **Impact tracking** – GULL's officers and affiliated organizations (as appropriate) are responsible for tracking the impact of the GULL system on a longitudinal basis. GULL global support provides (via the website) a simple, recommended approach to tracking and quality assurance but other approaches are also valued and welcomed. Additionally, GULL affiliated organizations are asked to prepare an annual report in which the evidence of tracking is documented together with whatever corrective action is deemed necessary to ensure that any variances are fully addressed.

7. **Clarity** – GULL's officers and affiliated organizations are asked to seek prior approval (from GULL global support) for all specialist pathways offered (e.g. Bachelor of Professional Studies (Community Development)) and make any necessary arrangements to handle questions and requests from their own GULL participants. Please explain in start-up sessions that GULL does not operate a global registry and so 'transcripts' cannot be provided. Additionally, please explain that GULL global support does not have the resources to enter into any form of correspondence on behalf of individual GULL participants. All reference requests must be handled locally by the appropriate GULL representative(s).

8. **Representation** - Accuracy in the portrayal and replication of the GULL logo and GULL's official system documentation (available from the website) and in providing advance proofs of all brochures, websites, promotional and printed materials for approval prior to release.

9. **Relationships** - Consultation and agreement with all third party organizations prior to using other logos and names of organizations on printed materials (including certificates) in conjunction with the GULL logo and name. Additionally, acceptance that GULL's executive team has the right to refuse permission to use third party logos, names of organizations and other details (as appropriate) if it is not deemed to be in GULL's best interests.

10. **Support** - GULL's officers are responsible for ensuring that appropriate guidance, on-going support and other assistance (as appropriate) is provided to GULL affiliated organizations and their representatives, administrators and facilitators.

GULL

Prior to affiliation, your organization's lead representative will have confirmed that he/she has:

- The authority to represent your organization.
- Completed the online briefing and accepted the basis on which GULL operates and is offered for use by your organization.
- Agreed (on behalf of your organization) to adhere to GULL's code of practice and accepted responsibility for ensuring that the provisions of the code are met in full - as verified by your own organization's annual report to GULL.
- Accepted that if your organization does not adhere to the code of practice that GULL reserves the right to withdraw permission to use the GULL system - either temporarily (until variances have been addressed) or permanently (in the event of a serious breach of the GULL code of practice or repeated/on-going variances that have not been addressed).
- Agreed that if he/she (the organization's lead representative) resigns from your organization, that he/she will brief and re-assign the above responsibilities to a successor or another senior colleague and inform GULL of the changes prior to departure.

After completing the affiliation process, your organization's lead representative is asked to prepare and circulate organization-specific policies and procedures and initiate an internal briefing process.

Section 2: Getting started

There are many ways of using the GULL system and the 'Getting started' section outlines a recommended approach that will enable you to link the expected outcomes of your training and other kinds of development activity to GULL's professional certification system. This approach ensures that you are able to build on what is already familiar to you and your organization.

GULL's objective is to enable your organization to recognize the individual and collective efforts of those who are causing change and progressive transformation in communities or in the workplace. A change process usually requires sustained effort – sometimes over a period of many years and to secure lasting progress, it is often necessary to build momentum by harnessing the creativity and energy of large numbers of people. Here, work and community-based action learning has a significant role to play, especially if it is coupled with externally recognized professional certification. We know that self-directed action learning can be operationalized on a large scale and that by engaging entire organizations and communities in the process, significant outcomes will arise. These include growth in individual self-esteem and confidence and wider impacts as groups of action learners learn together, pass on their action learning expertise to others and in turn, help to sustain the cascading process so that all who wish to participate will have the opportunity to do so.

GULL's starting point provides a means of 'cascading' the GULL system from those in leadership roles (who serve as cascade leaders) to every community or organizational level. The objective is to enable cascade leaders to begin their own professional Master or Doctor degree journey and at the same time, cascade the GULL system to others. In so doing, cascade leaders assume a key role and make a strategic contribution by ensuring the widest possible participation. As leaders can only establish the parameters for change, the involvement of many others (via GULL's cascade process) is mandatory – it is not possible to undertake GULL's Master or Doctoral pathways solely for personal development. The recommended getting started steps are:

(1) Establish a Professional Master (M) and/or Doctor (D) cascade leadership group. This group will lead by undertaking their own M or D level pathway in order to progress their own personal and professional development and, at the same time, cascade the GULL system to others (step 2). When you have recruited your cascade leadership team, establish a timetable of face-to-face meetings (ideally weekly but at very least monthly) and ensure that this group has read and understood the briefing resources.

 (2) Prepare and implement a GULL cascade plan by integrating GULL's Professional Bachelor degree pathway with your own training, short courses and other activity (all these are 'inputs') and the intended applications and evidence of learning provided by each and every participant (termed 'outputs'). This linkage is referred to as an 'outcomes map'.

The 'Affiliate' section of the website provides all the generic resources needed to cascade the GULL system, starting with the review activities in the 'Affiliate' section (a self-directed background briefing and tour of the GULL website) followed by the 'Getting started' and 'Impact tracking' sections which host the latest links and downloadable versions of briefing resources. It is important that cascade leaders familiarize themselves with these resources prior to drafting your cascade plan. Please see: http://www.gullonline.org/affiliate/getting-started/

Prior to cascading the GULL action learning system it is important to be aware of the general entry criteria for the three pathways to professional Bachelor, Master and Doctor, the various certification options and abbreviations used, the possibilities for creating pathways with specialist designations and the progression requirements. A general overview is provided on page 4 but please note that more detailed and specific guidelines, policies and procedures will be provided by your organization's lead representative. In all cases, please refer to your organization's specific guidelines. This is because GULL affiliated organizations are encouraged to customize the GULL system so that it is fully aligned with their unique needs, objectives and operating environments.

 GULL

GULL pathways to professional Bachelor, Master and Doctor

Professional Bachelor pathway
General entry profile and criteria: 17-25 years of age and those in this age range and older with limited literacy skills.

Professional Bachelor of Management (B Mgt) / Bachelor of Professional Studies (B Prof) level (L) BL1-5 ⟶				
BL1: Entry B Entry – generic award or an approved specialism	BL2: Certificate B Cert – generic or approved specialism	BL3: Diploma B Dip – generic or approved specialism	BL4: Associate degree B Assoc – generic or approved specialism	BL5: Bachelor degree B Mgt (Generic only) or B Prof (Approved specialism)
Evidence of learning verified by a facilitator	Verified by a facilitator	Verified by a facilitator	Verified by a facilitator	Verified by an independent professional*
Minimum time: 7 wks	Min. time: 7 weeks	Min. time: 10 weeks	Min. time: 12 weeks	Min. time: 14 weeks

Professional Master pathway
Typical entry profile and criteria: 26-35 years of age holding senior work or community roles. It is also for those aged 26 and above who have completed the GULL professional Bachelor degree. Cascade leadership participants must have the authority to create and implement at least one Professional Bachelor pathway outcomes map on behalf of their organization.

Professional Master of Management (M Mgt) / Master of Professional Studies (M Prof) level (L) ML1-5 ⟶				
ML1: Entry M Entry – generic or approved specialism	ML2: Certificate M Cert - generic or approved specialism	ML3: Diploma M Dip - generic or approved specialism	ML4: Adv. Diploma M DipA - generic or approved specialism	ML5: Master degree M Mgt (Generic only) or M Prof (Approved specialism)
Evidence of learning verified by peer review or a facilitator	Verified by peer review or a facilitator	Verified by peer review or a facilitator	Verified by peer review or a facilitator	Verified by an independent professional*
Minimum time: 7 wks	Min. time: 7 weeks	Min. time: 10 weeks	Min. time: 12 weeks	Min. time: 14 weeks

Professional Doctor pathway
Typical entry profile: At least 30 years of age but normally in the 40 to mid-50s age range who hold leadership roles in the workplace or community. It is also for those aged 30 and above who have completed the GULL professional Master degree. Cascade leadership participants must have the authority to create and implement at least one Professional Bachelor pathway outcomes map on behalf of their organization.

Professional Doctor of Management (D Mgt) / Doctor of Professional Studies (D Prof) level (L) DL1-5 ⟶				
DL1: Entry D Entry – generic or approved specialism	DL2: Certificate D Cert - generic or approved specialism	DL3: Diploma D Dip - generic or approved specialism	DL4: Adv. Diploma D DipA - generic or approved specialism	DL5: Master degree D Mgt (Generic only) or D Prof (Approved specialism)
Evidence of learning verified by peer review or a facilitator	Verified by peer review or a facilitator	Verified by peer review or a facilitator	Verified by peer review or a facilitator	Verified by an independent professional*
Minimum time: 7 wks	Min. time: 7 weeks	Min. time: 10 weeks	Min. time: 12 weeks	Min. time: 14 weeks

*Notes on Level 5 awards
All level 5 awards (Bachelor, Master, Doctor) must be verified by a suitably experienced independent professional (termed an 'external reviewer') and for approved specialisms (B Prof; M Prof; D Prof) the independent verifier must possess the appropriate specialist skills and experience to verify specialist attainments. The external reviewer is expected to discuss the candidate's output work with the participant so as to ensure that the candidate is the author of the work and that the criteria for 'sufficiency' have been met. If not, the candidate does not fail but he/she must continue until any gaps have been addressed.

Approved specialisms
L1-5 pathway awards (Bachelor, Master, Doctor) can be denoted by an approved specialism e.g. Bachelor of Professional Studies (Community Development). Your lead representative will provide a list of approved specialisms that can be used. The list must avoid using academic terms (like 'Education') or technical subjects (like 'Healthcare') underline unless appropriately qualified and experienced organizational staff have designed the pathway to include technical inputs and detailed verification of the related technical outputs (e.g. new knowledge and technical skills that can be demonstrated in practice). GULL seeks to encourage the acquisition of a broad range of personal and professional skills and its professional awards do not articulate with equivalent academic awards. Please note that Bachelor, Master and Doctor of Management awards are not denoted by a specialism. Please see Appendix 1: Does GULL offcer subject-specific awards? For more details.

GULL

Using the 'Getting started' resources

(1) Establish a Professional Master (M) and/or Doctor (D) cascade leadership group
Brief: This group will lead by undertaking their own M or D level pathway in order to progress their own personal and professional development and, at the same time, cascade the GULL system to others via the creation and implementation of an outcomes map.

By getting started with a Professional Master and/or Doctor cascade leadership pathway, community or workplace leaders can sustain their own personal and professional development and at the same time, cascade the GULL system to others via the creation and implementation of a Professional Bachelor pathway outcomes map. The Professional Master and Doctor cascade leadership pathways use exactly the same GULL narrative format elements so that participants can integrate the process of reflection, action learning and collaborative working with existing roles, responsibilities and the opportunity to cascade GULL and action learning to others. Entry to the appropriate pathway is determined by the profile of the participants, as follows:

Professional Master – 26-35 years of age holding senior work or community roles. Additionally, participants must have the authority to create and implement at least one Professional Bachelor pathway outcomes map on behalf of their organization.

Professional Doctor – At least 30 years of age but normally in the 40 to mid-50s age range. Participants must hold community or workplace leadership roles and additionally, they must have the authority to create and implement at least one Professional Bachelor pathway outcomes map on behalf of their organization.

The cascade leadership pathway is self-directed and facilitated and participants are expected to organize their own resourcing (learning coaches, specialist advisers, external reviewer (level 5 only)) and support each other by peer review and by providing feedback for each other. A cascade leadership group consists of at least 3 members and ideally 5-10 members with either a mix of Master and Doctor level candidates (in one group) or if there are sufficient participants, working as two separate but inter-dependent small groups (e.g. one Master and one Doctor pathway group). Additionally, participants should lead, guide and coach their Professional Bachelor pathway participants and ensure that those who are progressing on the Professional Bachelor pathway (e.g. progressing from Level 1 to Level 2) support new Level 1 participants.

The duration of the M and/or D cascade leadership group pathway is a minimum of 12 months and a maximum of 18 months.

Prior to getting started with Professional Master and/or Doctor cascade leadership, please download and review the following resources:

Resource:	Purpose:
GULL overview	Outlines GULL's mission, mandate and role in the community and the workplace.
The concept of action learning	Explains the process of action learning.
GULL cascade leadership pathway	Outlines the objective of the GULL Professional Master and/or Doctor cascade leadership pathway and the steps involved in self-direction and facilitation.

(2) Prepare and implement a GULL cascade plan
Brief: Prepare and implement a GULL cascade plan by integrating GULL's Professional Bachelor degree pathway with your own training, short courses and other activity (all these are 'inputs') and the intended applications and evidence of learning provided by each and every participant (termed 'outputs').

Prior to drafting your cascade plan, please review the following resources:

Resource:	Purpose:
Outcomes mapping – An overview	The objective of outcomes mapping is to enable participants to convert inputs (from training, short courses and other activities) into outputs (evidence of application, change and learning). There are many ways in which participants can gather their evidence of learning and to assist with this, GULL recommends the use of its diary-based narrative format. The narrative format can be used to augment any existing methods that are used by participants to gather evidence of progress and attainment. This resource outlines the principles of outcomes mapping and introduces the various diary-based forms that can be used for this purpose.
CCMP-GULL – An outcomes mapping example	In order to recognize and certify the evidence of learning from inputs (e.g. training) practice (or 'ownership') and the attainment of outcomes (e.g. learning and change) it is necessary to gauge progress against indicative outcome indicators or criteria. The church and community mobilization process (CCMP) with GULL outcomes map example illustrates these points in relation to a professional Bachelor pathway with three certification points for CCMP facilitators and a cascade with two certification points for CCMP co-facilitators and one certification point for CCMP church & community resource persons.

GULL

CCMP-GULL cascade plan example	The CCMP-GULL cascade plan example illustrates how to compile the professional Bachelor pathway outcomes map component of your GULL cascade plan. Please refer to this example when drafting your plan.

Reflect on the cascading options by considering the range of on-going training and development activities in your organization. Consider:

- Have we established indicators or outcomes criteria for our training and development?
- What should participants be able to do and demonstrate at the end of each session?
- What is working well? What could be better?
- How might we further encourage participants to use and apply the training and capture the evidence of learning?
- If you have existing mechanisms for capturing the evidence of learning, how might these be augmented by the activities and forms outlined in the GULL cascade leadership pathway document?

Now download and complete the GULL cascade plan form.

Briefing resources and narrative format forms
Please visit: http://www.gullonline.org/affiliate/getting-started/

1 Narrative format briefing & overview

Resource:	Purpose:
Foundation levels 1 & 2 briefing	Explains the GULL narrative format process for foundation levels 1 & 2.
Foundation levels 1 & 2 overview	Provides an accompanying explanation with diagrams to illustrate the GULL narrative format process at foundation levels 1 & 2.
Progression levels 3, 4 & 5 briefing	Explains the GULL narrative format process at progression levels 3, 4 & 5. [Cascade leadership project work includes the creation and implementation of at least one Professional Bachelor pathway outcomes map.]
Progression levels 3, 4 & 5 overview	Provides an accompanying explanation with diagrams to illustrate the GULL narrative format process at progression levels 3, 4 & 5. [Cascade leadership project work includes the creation and implementation of at least one Professional Bachelor pathway outcomes map.]

2 Foundation levels 1 & 2 resources

Resource:	Purpose:
A profile of Reg Revans	The career of Reg Revans, a pioneer of action learning.
Briefing for facilitators	Guide notes on how to facilitate/self-facilitate small groups.
Briefing for learning coaches	Explains the role of the learning coach.
Briefing for specialist advisers	Explains the role of specialist advisers in providing learning support and technical expertise.
Introducing action learning	An introductory resource.

3 Progression levels 3, 4 & 5 resources

Resource:	Purpose:
Introducing the learning log	Introduces learning to learn and outlines how to start a learning log.
Planning and writing guide	Guidelines on how to plan and write-up projects.

GULL

4 Narrative format forms

Resource:	Purpose:
Personal learning statement (PLS) form [Levels 1, 2 & 3]	Use the PLS to frame a personal agenda for learning (level 1) and to review progress and update as appropriate (levels 2 & 3).
Daily summary form [Levels 1, 2 & 3]	Use for daily notes and to assist with the weekly summary form.
Weekly summary form [Levels 1, 2 & 3]	Use to summarize daily summary form entries and key points for discussion with a personal learning coach. Plan for a 10 minute face-to-face discussion with a coach each week and then add discussion outcomes to the weekly form prior to peer review (with colleagues) and sign-off by a facilitator (as appropriate).
Monthly summary form [Levels 1, 2 & 3]	Use in week five to review and summarize progress over the full cycle. Complete by obtaining a written comment from a personal learning coach and submit for written comments, feedback and sign-off by a facilitator.
Return on outputs form [Levels 1 & 2]	Use to summarize personal and organizational learning outcomes after completing four weekly summaries and one monthly summary.
Project review form [Levels 3, 4 & 5]	Use to reflect on one or more strands of project work, the process and approach deployed, its relative effectiveness, alternative courses of action and the steps required to sustain the project.
Learning summary form [Level 5]	Use to review the learning journey from the outset (at level 1) to the conclusion (at level 5).
Outcomes review form [Level 5]	Use to summarize and to quantify the outcomes, impact and benefits of your action learning journey.

Section 3: Impact tracking

GULL's code of practice specifies that GULL affiliated organizations must:

1. Check to ensure that all their participants have gathered together appropriate evidence of their learning and its application prior to each and every level of certification;
2. Track the impact of the GULL system on a longitudinal basis;
3. Prepare an annual report in which the evidence of tracking is documented together with details of corrective action (as needed) taken in response to variances.

In getting started, outcomes mapping enables GULL affiliates to integrate GULL certification with their training and other activities. In so doing, participants should be able to gather and summarize the evidence of their own learning (personal and professional) and the specific contribution they have made to community or work-based projects. Outcomes mapping draws on existing formats for documenting outcomes as well as GULL's generic forms and by requiring all GULL participants to gather the evidence of their respective contributions to change, overall impact tracking is relatively straightforward because each participant is responsible for identifying their own outcomes and evidence of learning.

Using action learning to stimulate change
The GULL learning process is based on two parallel strands of action and reflection. It begins when learners develop an outline plan for their own learning as a basis for attaining personal and organizational learning outcomes. As they progress and at the end of the formal journey, participants must reflect on what they have accomplished for themselves and for the other stakeholders involved in the process. In all cases, the outcomes should have a hard edge – in the form of practical, implementable and trackable contributions to real work/community issues. In this way learners, sponsors and others can discern a difference from their investment in action learning by monitoring or tracking the individual and collective impact of action learning.

Gathering and summarizing evidence of learning and change
The GULL system includes generic, customizable formats for individual reflection and for individual and group projects. Our goal is to enable affiliates to forge a natural form of integration between work and/or other activities and active on-going learning. It is for this reason that all our formats can be adapted to fit the circumstances, the learning objectives and the anticipated learning outcomes. Although most learners provide written evidence of learning and application in their own language, there are circumstances in which a written format may not be the best mechanism to use. Here, evidence of learning might be presented in visual format (e.g. a portfolio of photographs depicting the stages of skill acquisition or project development), video format (using a combined audio-visual approach) or using other practical methods and combinations that clearly demonstrate evidence of learning, application and change.

The GULL narrative format provides a number of forms that can be used to gather and track individual learning outcomes:

Return on outputs form	Use to summarize personal and organizational learning outcomes after completing four weekly summaries and one monthly summary. [Normally used at Levels 1 & 2]
Project review form	Use to reflect on one or more strands of project work, the process and approach deployed, its relative effectiveness, alternative courses of action and the steps required to sustain the project. [Normally used at Levels 3, 4 & 5]
Learning summary form	Use to review the learning journey from the outset (at level 1) to the conclusion (at level 5). [Normally used at Level 5]
Outcomes review form	Use to summarize and to quantify the outcomes, impact and benefits of your action learning journey. [Normally used at Level 5]

The Outcomes review form (ORF) is especially helpful in settings where affiliate organizations are able to establish a searchable intranet 'Projects' database. Here, with minor modification, the ORF can be used to enable GULL participants to add details of the ROI evidence arising from their project work. Prior to database entry, this can be verified and 'signed off' (as accurate) by an appropriate specialist or senior leader.

Tracking, review and corrective action (TRACA)

GULL provides an online tracking, review and corrective action (TRACA) system with reporting formats that are easy to follow and use. TRACA uses a quarterly self-review format so that users can track their own progress and identify their own variances for corrective action. This takes place over an annual cycle that concludes with an annual report and review meeting. The self-review reporting steps are as follows:

Step 1: Quarterly Facilitator Report (QFR)
Whenever a new action learning group starts, the facilitator uses the QFR to record what is working well / not so well together with any corrective action needed. QFR reports are due on the first day of the month – 1st March, 1st June, 1st September and 1st December and so for example, if a new group starts on 1st November, its first QFR would be due on 1st December and thereafter on a quarterly basis until the group completes.

Step 2: Quarterly Administrator Report (QAR)
If there are multiple action learning groups in progress, the affiliate must also prepare a consolidated QAR. This report is prepared by the affiliate's administrator and it summarizes the key issues arising during the past quarter. The QAR should be sent on same day each quarter (two weeks after the receipt of QFR reports – e.g. 15th March, 15th June, 15th September and 15th December) to the affiliate's representative.

Step 3: Annual Administrator Report (AAR)
Prepared by the administrator for the representative, the AAR interprets the QARs and/or other tracking data. It also provides:

(1) A strategic overview - with a concise summary of the extent to which objectives for the year have been achieved.
(2) Commentary on the QARs and/or other tracking data - highlighting variances, issues and action taken or proposed.
(3) An operational overview – outlining challenges (e.g. delivery gaps, system or procedural problems).
(4) Plans for the coming year – outlining suggestions for supporting priorities.
(5) Action – needed to implement plans for the coming year.

Summary: Annual TRACA cycle steps:

Step 1: Quarterly Facilitator Report (QFR)	The QFR is prepared by action learning group facilitators and submitted to the affiliate's designated administrator. [Requested on 1st March, 1st June, 1st September and 1st December]
Step 2: Quarterly Administrator Report (QAR)	Whenever there are multiple action learning groups in progress, the administrator prepares a consolidated quarterly report (QAR) for the representative. [Submitted two weeks after receiving the QFRs – 15th March, 15th June, 15th September and 15th December]
Step 3: Annual Administrator Report (AAR)	The AAR is prepared and submitted by the administrator to the representative. Thereafter, an annual review meeting date is scheduled. This meeting is attended by the affiliate's administrator, the representative and by the designated GULL officer.

Section 4: Localizing GULL

Prior to starting a local cascade, it is important to understand the principles of action learning, the purpose of GULL and its generic system and the specific policies and procedures that have been developed by your lead representative and his/her team. This concluding section lists the key topics to consider so as to enable your team to localize the GULL system:

1. **Cascade options** – most organizations that deploy the GULL system in multiple locations will be able to use the system in a variety of ways. The main options are: (1) Cascade leadership that links training (technical input) with personal and professional development; (2) An outcomes mapping approach that embeds the GULL system with an existing change process (Please see the CCMP-GULL outcomes mapping example) and (3) a linkage with staff performance appraisal and on-going project work. Prior to making a start, carefully consider which of these options you'd like to begin with and the various ways in which each of these options might assist you to localize and cascade the GULL system.

2. **Cascade leadership** – it is essential that senior local leaders support your cascade and ideally, participate or lead the initiative in the context of their own personal and professional development. The best way to understand the potential for action learning is to experience the process first-hand and so it is helpful to ensure that there are sufficient numbers of participating national office and field staff at the outset. The best cascade leaders are willing, enthusiastic participants, so 'hand pick' the initial cascade leadership team and others will be drawn in by their enthusiasm! Finally, if you are cascading to community volunteers, do ensure that they have adequate support from field staff during the early stages as they are unlikely to possess the self-confidence to sustain the process until they have reached BL2 or BL3 level.

3. **Cascade administration** – it is vitally important to ensure that a skilled, organized administrator is supporting the cascade leadership team. The administrator needs to gather the names of all the participants and prior to an award ceremony, ensure that the names have been correctly typed into the GULL certificate form so that names can be print-merged directly onto the certificates. [Note: the administrator should aim to ensure that the candidate's name is typed into the GULL certificate form exactly as the candidate would like their name to appear on the certificate.] In large organizations, the localization process also includes the local preparation of certificates and the lead representative will provide finalized certificate templates to use with the GULL certificate form. The certificate templates can be customized in several ways, to include the logo of the affiliated organization and a representative's digital signature.

4. **Verification** – prior to certification, it is essential to ensure that each candidate has gathered and presented the evidence of their own learning and development and second, that this material is 'sufficient' in breadth, depth and detail. As the majority of participants are likely to be experiencing GULL in the context of both training (or staff development) coupled with self-directed personal and professional development, it is relatively easy to ensure that trainers have developed appropriate outcomes indicators. Thereafter they can verify and sign-off the evidence of learning and application by reviewing the practical outcomes (e.g. can the trainee demonstrate attainment of the intended outcomes?) Second, has the trainee documented their journey (using the narrative format)? It is important that 'smart', time effective ways of verification are deployed – the trainer is NOT a teacher – he/or she is not expected to 'correct' a GULL participant's work – simply to verify 'sufficiency'. If the work is not sufficient, the participant does not fail, but must continue to gather evidence of learning and application until the local 'sufficiency' criteria have been met. Please note that GULL's generic forms can be customized to reflect local contexts and languages and all written work can be completed in the local language(s) as appropriate. As noted on page 4, the verification procedures for all level 5 work (the professional degree award) varies in that the L5 outcomes MUST be verified by an independent, suitably skilled and experienced professional. The key requirement here is that the external reviewer is not involved in supporting the participants and so the reviewer could be a staff member or someone from the community who offers to undertake this role on a voluntary basis so as to ensure that the gauge of 'sufficiency' at this level reflects an independent assessment.

5. **Sustaining momentum** – it is important to build and carefully manage the cascade by ensuring that every participant understands that they are responsible for passing on the process of action learning (by guiding two or three new participants) as soon as they have completed their pathway level 1 work. So, as they start level 2, they should be guiding two or three new level 1 participants – and one step ahead, the level 2 participant continues to guide the same small group at levels 3, 4 and 5 and thereafter until their own small group completes level 5. In so doing, it is possible to ensure that the cascading process is manageable (without overloading key individuals) and sustainable. In essence, the GULL process enables each person to develop expertise in self-directed action learning and they should do this first for themselves, and second so that they can share the process with others.

6. **Variance monitoring** – every GULL application is uniquely different because no two applications share exactly the same dynamics, context and challenge. Further, as each person should be aiming to learn what he or she needs to learn in order to advance and improve, the process is customized at both the individual level and the local level. To assist with individual customization, aim to ensure that EVERY participant has a personal learning coach (a helper). To illustrate, if the participant wants to improve his or her time management skills, they should seek a learning coach who is a good time manager. The best way to monitor this and other aspects of the process is to review progress on a quarterly basis (or more frequently at the outset) and thereafter, immediately initiate any corrective action needed so as to ensure that momentum and progress is sustained. In so doing, aim to ensure that localization is the key priority – always aim to reflect traditional knowledge and local ways of learning so that the process can be fully embedded and owned by all participating communities.

7. **Sharing and benchmarking** – in locations where several organizations are using the GULL system, it is helpful to 'share and compare' approaches and applications. However, each and every affiliate organization is encouraged to take ownership of the GULL system so that its application reflects their own issues and priorities. This means that there will always be differences of opinion and approach but it is certainly helpful to share experiences, insights and learn from one another.

8. **Impact tracking** – GULL provides its online tracking, review and corrective action (TRACA) system to enable affiliate organizations to undertake their own impact tracking. As GULL's role is to certify evidence of learning and application, it is perfectly possible to develop a 'bottom-up' approach to tracking both the qualitative and quantitative return on investment in training and other development activity. Impact tracking is not optional – the localization process must ensure that systematic evidence gathering is established in order that corrective action is identified and incremental improvements are made. Finally, as all input activities (such as training) have a monetary cost, aim to identify the return by tracking the related outputs in terms of capacity building and the wider array of other benefits arising from the process.

9. **Annual reporting, ceremonies and endorsement** – local award ceremonies are important because this is the place where the change process is publicly recognized. It is also possible to build workshop activities around certification events – usually the day before the event or during the morning, prior to an award ceremony. It is helpful to ask participants to prepare for this event by summarizing their own journey and by providing feedback on the process (e.g. by using a questionnaire). If skilfully managed, this information can be summarized and used as an input to the local annual reporting process. It is also helpful to invite local and/or national leaders (e.g. politicians) to attend and speak at local award ceremonies and by building on these relationships, it is possible to secure political endorsement. GULL uploads endorsements to the central website in a variety of formats – from formal letters of endorsement (or support) through to speeches given by politicians and other leaders in text or video format. Endorsements help us to contextualize GULL in any setting and they also help to ensure that the GULL network movement gains wider credibility. Please do all that you can to secure endorsements from local and national politicians and other leaders as soon as you are able to do so.

10. **Budgeting and finance** – as you plan to localize GULL, it is important to budget for implementation and local travel, materials (such as certificates) and other items as specified by the lead representative. GULL has no formal source of funding and so to maintain the system we ask all users (at all levels) to make an affordable (for the user) contribution to GULL's operating costs. Please consider in conjunction with your organization's lead representative how you will ensure that your cascade can be sustained locally from a financial perspective and whether or not it would be appropriate to ask for a contribution from community participants. In workplace applications (where participants have a paid role) affiliate organizations normally require a contribution from the participant, a portion of which is allocated to local costs and the balance to GULL. In general terms, if participants can afford to contribute, they should do so because they are more likely to commit to and value the process if they have made an affordable (for them) financial contribution.

Appendix 1:
Does GULL offer subject-specific awards?

GULL's approach to lifelong action learning (see: <u>Media</u> and <u>Publications</u> for more details) draws on life and work experience to enable participants to become skilled, self-directed lifelong learners. <u>This is GULL's sole purpose</u> - we do not 'teach' subject specialisms and we do not issue subject-specific awards, except in the following carefully documented circumstances.

Bachelor of Management (B Mgt) and Bachelor of Professional Studies (B Prof)

GULL's professional Bachelor pathway is intended for those with life and work experience and for those who have had limited educational opportunity. To assist participants at this level, GULL often works with affiliated organizations that provide skills and trade-related training in vocational areas like Catering, Bakery and Health and Beauty or expertise in a change process such as Church and Community Mobilization. In these circumstances, a specialism e.g. (Health and Beauty) can be denoted on B Prof pathway certificates (in brackets) providing that:

1.   A GULL honorary officer (President, Vice President, Network Leader) has approved a skills training-based pathway in conjunction with an affiliated organization.
2.   The denoted specialism is permissible if each B Prof level is supported by a related curriculum and facilitation provided by professionally qualified technicians, equivalent to 75 percent of the allocated study time for each level and with formal assessment by observation or examination (as appropriate) conducted by professionally qualified technicians.
3.   Competence in a denoted specialism (B Prof) and generic skills (B Mgt) cannot be certified at professional Bachelor degree (level 5) until candidates have met all pre-specified requirements and successfully completed an oral examination with an independent examiner who is an acknowledged expert in the specialist field.

It is <u>not</u> the role of GULL to verify competence in subject-specific areas, and abuse of this principle is a violation of the GULL code of practice that authorizes GULL's honorary officers and affiliated organizations to act on its behalf.

GULL graduates may only use the post nominal abbreviations: B Mgt – a generic award (applicable if the candidate holds a junior manager or leader role) or B Prof (Specialism) where the specialism denotes verified competence in practical, trade-related skills.

Master of Management (M Mgt) and Master of Professional Studies (M Prof)

GULL's professional Master pathway is intended for those with substantial life and work experience and for those in managerial or leadership roles. They must demonstrate that their studies have led to a broad, strategic impact in their organizational setting prior to completion of the pathway. At this level, the most relevant M Prof pathway specialism is 'Leadership Development' because GULL's purpose is to assist participants to become more effective professionals. Alternatively, if an affiliated organization focuses on a cause or change process such as 'Personal Viability' the cause or change process can be used to denote M Prof pathway certificates (in brackets).
Exceptionally, a different professional specialism may apply, providing that:

1.   A GULL honorary officer (President, Vice President, Network Leader) has approved a professional training-based pathway in conjunction with an affiliated organization.
2.   The denoted specialism is permissible if each M Prof level is supported by a related professional curriculum and facilitation, equivalent to 75 percent of the allocated study time for each level and with formal assessment by observation or examination (as appropriate) conducted by independent professionals.
3.   Competence in a denoted specialism (M Prof) and generic skills (M Mgt) cannot be certified at professional Master (level 5) until candidates have met all pre-specified requirements and successfully completed an oral examination with an independent examiner who is an acknowledged expert in the specialist field.

Graduates are not permitted to claim competence in subject-specific fields unless the stipulations relating to expert curriculum, facilitation, research (as appropriate) assessment and external examination have been met. However, it is permissible for graduates to mention in their curriculum vitae or on their website that they possess a GULL M Prof (Leadership Development) or M Mgt and that their development pathway included a professional project application in their work-related specialism. It is <u>not</u> the role of GULL to verify competence in subject-specific areas, and abuse of this principle is a violation of the GULL code of practice that authorizes GULL's honorary officers and affiliated organizations to act on its behalf.

GULL graduates may only use the post nominal abbreviations: M Mgt – a generic award (applicable if the candidate holds a managerial or leadership role) or M Prof (Specialism) where the specialism denotes verified competence in the related professional skills.

Doctor of Management (D Mgt) and Doctor of Professional Studies (D Prof)

GULL's professional Doctor pathway is intended for GULL M Mgt or M Prof graduates, aged 30 and above with substantial managerial or leadership experience. They must demonstrate that their studies have led to a broad, strategic impact in their organizational setting prior to completion of the pathway. The most relevant D Prof pathway specialism is 'Leadership Development' because GULL's purpose is to assist participants to become more effective professionals. Alternatively, if an affiliated organization focuses on a change process or cause such as 'Good Governance' the change process or cause can be used to denote D Prof pathway certificates (in brackets).

GULL has no provision for curriculum-led subject specialisms at this level and graduates are not permitted to claim competence in subject-specific fields. However, it is permissible for graduates to mention in their curriculum vitae or on their website that they possess a GULL D Prof (Leadership Development) or D Mgt and that their development pathway included a professional project application in their work-related specialism. It is not the role of GULL to verify competence in subject-specific areas, and abuse of this principle is a violation of the GULL code of practice that authorizes GULL's honorary officers and affiliated organizations to act on its behalf.

GULL's professional doctor pathway always leads to practical action and strategic change with candidate verified return on investment. Please note that GULL does not offer academic research-based pathways. Competence in leadership development, a cause or change process (D Prof) and generic skills (D Mgt) cannot be certified at professional Doctor (level 5) until candidates have met all pre-specified requirements (including evidence of the effectiveness of the change process and quantification of the return on investment) and successfully complete an oral examination with an independent examiner with prior examining experience at this level.

GULL graduates may only use the post nominal abbreviations: D Mgt – a generic award (applicable if the candidate holds a managerial or leadership role) or D Prof (Leadership Development or an approved 'cause' or 'change process' aligned with the expertise of the affiliated organization).

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