Corporate Learning Improvement Process
The EFMD Accreditation for Corporate Learning Organisations & Universities

CLIP PROCESS MANUAL
THE CLIP PROCESS MANUAL
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Phase O: Enquiry

The CLIP team will take the time to answer all the initial questions that arise when companies are considering an application for accreditation. Exploratory meetings can be organised in the EFMD’s Brussels premises or on-site within the company itself.

1: The Accreditation Process

Stage 1: Application to enter the CLIP Accreditation Process

Formal entry into the CLIP Accreditation process requires the submission of the following documents:

- A Letter of Application (annex 1)
- A Datasheet providing summary information and statistical data about the Learning Organisation’s positioning within the company, internal organisation, available resources and portfolio of activities (annex 2)
- A brief SWOT analysis of the Learning Organisation’s assessment of its current situation

Stage 2: Eligibility

The purpose of this stage is to provide an initial screening of all applications to ensure that the Learning Organisation falls within the scope of the CLIP accreditation scheme and that there is a strong probability that it will achieve accreditation at the end of the process.

The Eligibility Criteria

The decision on Eligibility is taken by the CLIP Accreditation Committee based on the following criteria:

- The Learning Organisation to be assessed is an identifiable, separate unit within the company, under the management of an appointed Learning Officer and with its own staff.
- The Learning Organisation to be reviewed is more than just a sub-unit of a wider training organisation.
• The Learning Organisation has a clearly defined mandate to pursue objectives that are linked to the strategy of the company or operational unit.

• The Learning Organisation is positioned at corporate level within the company or within a major geographical division or business unit.

• The Learning Organisation is providing more than just highly specialised technical training. Its offer should include executive and management development and strategic change objectives.

• The scope of the Learning Organisation’s activities must not be so small that the assessment only focuses on one or two programmes.

• The Learning Organisation is able to go through the process in English.

The Accreditation Committee will take its decision in the light of the Eligibility Visit report and the Datasheet together with the supporting documents submitted by the Learning Organisation.

The Eligibility Visit

The Eligibility Visit will take the form of a one-day on-site visit to the company carried out by one or two persons (usually a member of the EFMD CLIP team and/or an experienced member of the CLIP Steering Committee).

The objectives of the Eligibility Visit

1. Brief the Learning Organisation staff on the CLIP process

   a) Clarify the Learning Organisation’s objectives and motivations in going through the CLIP process
   b) Explain the CLIP standards and assessment criteria
   c) Explain in detail the subsequent stages of the CLIP process (Self-Assessment, the Self-Assessment Report and the Peer Review Visit)

2. Clarify the scope of the subsequent assessment

   a) Define the scope of what is to be assessed in the accreditation process in terms of the types of L&D interventions offered by the Learning Organisation and the target audiences covered.
   b) Determine the boundaries of the Learning Organisation that is to be assessed
3. **Make a recommendation to the Quality Assurance Committee regarding Eligibility**

   a) Identify any problems that may render the Learning Organisation ineligible for entry into the process or make ultimate accreditation unlikely

   b) Make a recommendation to the CLIP Accreditation Committee with regard to the Eligibility of the Learning Organisation to enter the CLIP process

   c) Flag up areas of concern that are likely to require particular attention in the Self-Assessment and Peer Review stages

**Defining the Scope of the CLIP Assessment**

As indicated above an important function of the Eligibility Visit is to determine the scope of the upcoming CLIP assessment. It is essential to make very clear at the Eligibility stage exactly what is in scope and what is out of scope for the Learning Organisation that is to be assessed. This does not mean that the company can choose to submit only part of its portfolio of activities for CLIP accreditation. On the contrary the CLIP assessment will cover all programmes, services and coordinating activities that fall within its mandate.

When considering the types of L&D interventions distinctions should be made between the main areas, for instance:

- Executive Development (which may or may not include Talent Management) for the top echelons of the company’s management structure
- Management Development (for junior and middle managers)
- Professional Development (e.g. finance, sales and marketing, project management, etc.)
- Organisation Development (which may include change management)
- Technical Training

In most cases the central, corporate Learning Organisation will not be responsible for all L&D in the company. Technical training, which usually remains the responsibility of the business units, is often out of scope. In large companies, there may be other providers in the divisions and regions with which the corporate Learning Organisation will interface. In these cases, the CLIP assessment would only extend to the Learning Organisation’s role in coordinating the L&D agenda across the company.

It is also necessary at this stage to define the boundaries of the learning organisation itself, especially when the learning function is part of a complex corporate HR structure. It is often necessary to explain the interface with other Corporate HR units such as Talent Management or Executive Development.
The Eligibility Visit Report (annex 3)

The person conducting the Eligibility visit will draft a report with a recommendation on the Learning Organisation’s readiness to enter the CLIP process for consideration by the CLIP Accreditation Committee.

A copy of the report will be sent to the company following the decision by the QAC.

Validity of the Eligibility decision

Eligibility is normally valid for one year before the end of which the company is expected to have gone through the Self-Assessment and Peer Review process.

It may be agreed by mutual consent between the company and the Accreditation Committee that the validity of the eligibility is extended beyond the one-year period in exceptional cases where it can be demonstrated that there are good reasons to allow more time. In the case of such an extension, a formal one-day on-site visit will be organised one year after the eligibility decision in order to monitor progress within the company.

Stage 3: Preparing the Self-Assessment

Once the company has been declared eligible, it enters the crucial Self-Assessment phase. The Learning Organisation embarks on a self-critical analysis of its standing with respect to the nine chapters in the CLIP Criteria Framework. It must assemble the information necessary to understand its situation with respect to the different areas to be assessed and it must work out its own evaluation of its strengths and weaknesses in each area. Experience has shown that this process, if assiduously carried out with the extensive involvement of the Learning Organisation’s staff, clients and stakeholders, will in itself deliver great value.

Nominating a Project Leader

It is important to designate a project leader to organise the Self-Assessment phase, to supervise the drafting of the Self-Assessment Report and to coordinate the subsequent on-site Peer Review visit. This person is usually not the Head of Learning. In the CLIP experience to date, many companies have given this responsibility to a junior member of the Learning Organisation’s staff or to a trainee doctoral student.

Defining the Methodology

At the beginning of the Self-Assessment phase, careful thought should be given to the methodology for gathering the necessary data, for collecting stakeholder input and constructing the report. It
should be clear from the start what is expected of each of the Learning Organisation’s staff members and who will be responsible for the drafting of the different sections in the report.

Gathering the Material

The challenge of aligning the required facts and figures is often revealing of the shortcomings in the Learning Organisation’s internal information systems. The process of gathering and structuring the input for the future Self-Assessment report will be of great value in clarifying where the Learning Organisation stands in its current stage of development.

Producing a Strategic Self-Audit and a SWOT Analysis

An essential outcome of this Self-Assessment phase will be a better understanding of the effectiveness of the Learning Organisation’s strategic positioning within the company and a comprehensive SWOT analysis for each of the areas covered by the CLIP standards and criteria.

Mobilising the Principal Stakeholders

The Self-Assessment phase provides an opportunity for the Learning Organisation to engage in a constructive dialogue with the decision-makers in the company who are its principal stakeholders. Opinions, judgements and suggestions from across the company can be brought to bear on the Learning Organisation’s portfolio of activities in a structured, focused and non-adversarial manner.

Stage 4: Drafting of a Self-Assessment Report

The report will provide a description of the Learning Organisation’s mission, positioning, strategic objectives, governance and management systems, programme portfolio, etc. It should, however, be more than just a descriptive document and should include:

- A short history of the Learning Organisation
- A Strategic Self-Audit
- A SWOT analysis of the Learning Organisation’s present situation within the company. In addition to an overall statement, a SWOT analysis should be provided for each chapter
- An assessment of its on-going quality improvement agenda

The Self-Assessment Report will usually be between 40-60 pages. It should not take the form of PowerPoint slides but should be written out fully. PowerPoint presentations may, however, be added as appendices

The main purpose of the report is to provide the Peer Reviewers with a complete understanding of the Learning Organisation and its role within the company. It should provide sufficient information so that the reviewers have the essential information about the Learning Organisation before they begin the series of meetings and interviews during the on-site visit.
Moreover, a well-constructed and thoughtful Self-Assessment Report will also serve as an important internal document for all those involved in the activities of the Learning Organisation.

**Stage 5: The On-Site Peer Review** *(annex 4)*

The Peer Review is a two-and-a-half day on-site visit conducted by a four-person team.

The review is at the heart of the CLIP assessment and accreditation system. It is the central event during which experts and practitioners from the corporate learning profession give their undivided attention during more than two full days to a company's learning function in order to provide an unbiased, challenging and constructive evaluation of what they have observed. They bring to the exercise their best individual and collective judgement within an extensive framework of standards and criteria, guided by a highly structured process that leads them as a team to reach a carefully substantiated assessment.

The success of the Peer Review process depends on two key elements: the composition of the review teams and the construction of the review schedule.

**The Composition of the Peer Review teams**

A typical Peer Review team is composed of one member of the EFMD or an experienced former CLO, two practising CLOs from the CLIP Steering Committee and one Head of Executive Education from a major business school. The reviewer pool also includes a certain number of former CLOs who have deep familiarity with CLIP and who remain close to the learning profession. In all cases, the company has the right to veto a proposed member of the review team if there are valid issues of conflict of interest or incompatibility. One of the members of the team is designated to act as Chair of the Peer Review event and to write the final report.

**The Peer Review Schedule** *(annex 5)*

During the visit, the Peer Review team will meet with a large cross-section of the Learning Organisation’s staff and its stakeholders across the company. These will include Executive Committee members, senior managers in the corporate headquarters, division and business unit heads, the head of Corporate HR, current and former participants in the Learning Organisation’s programmes, programme designers and other Learning Organisation staff, line managers responsible for nominating their subordinates to participate in the programmes, internal and external facilitators, external suppliers such as consulting companies and universities.

In many cases, an interview has also been scheduled with the company’s CEO.

Many of the interviews are conducted by telephone or video conference when face-to-face meetings are not feasible.
The Base Room

A designated room should be assigned to the Peer Review team as their ‘home’ base for the duration of the visit. Additional supporting documents that were not included in the Self-Assessment material can be laid out in the room for examination by the reviewers. Access to the on-line learning environment should also be made available. Normally the Base Room is not used for interview purposes, but as a work room for the Peer Review Team.

The Assessment Process

The team begins its work on the evening prior to the first day of meetings with a preliminary assessment based on its reading of the Self-Assessment report and the supporting documents.

During the interviews the team members take notes and build up their individual assessment using the Criteria Checklist which sets out item by item the criteria in the 9 chapters (see attached document).

At the end of the second day the reviewers meet to make their final assessment as a team. The Chair invites each member of the team to fill in the Evaluation Sheet with his or her own individual assessment. For each item the reviewers choose Above Standard, Meets Standard or Area for Development.

The reviewers then confront their opinions and agree on a single group assessment for each item, thus constructing a profile of the points of excellence, the strengths and the areas for development of the Learning Organisation under review. This assessment process is not intended to be a scoring system, since the weighting of the dimensions under consideration will vary in accordance with the specific circumstances of each company.

During the final meeting on the third morning, the Chair brings the Peer Review to a close in a formal debriefing session in which the team communicates its main conclusions. It will be made clear that the Peer Review team does not take the final decision concerning accreditation. It makes a recommendation to the CLIP Accreditation Committee, which makes the final decision.

The Peer Review Report

The Peer Review Report is a major output of the CLIP process and is intended not only to summarise the team’s assessment of the quality of the Learning Organisation but also to provide significant benchmarking and continuous development guidance to the company. It has been current practice within the CLIP community to share these reports among Steering Committee members.

The Report will cover the following points:
- Detailed assessment against the CLIP criteria
- Identification of the points of excellence and the strengths observed during the review
- Identification of key issues and challenges
• Recommendations and suggestions for future development
• Recommendation to the CLIP Accreditation Committee concerning the award of the Quality Label. The Peer Review team can recommend:
  o Full accreditation for five years
  o Conditional accreditation for three years with the indication of specific development objectives to be met in order for the accreditation to be maintained
  o Deferral for a period of not more than one year in cases where clearly identified corrective measures can be taken to make accreditation possible
  o Non accreditation

**Stage 6: Awarding of the CLIP Quality Label**

Decision by the CLIP Accreditation Committee to validate the recommendation of the Peer Review team regarding the award

Criteria for the award

• Satisfactory completion of the CLIP quality assurance process
• Evidence that the Learning Organisation broadly meets the CLIP standards
• Evidence that the Learning Organisation is committed to continuous improvement and that it has an agenda for future development

**Nature of the accreditation decision**

• *Accreditation for five years*. The Learning Organisation is required to inform the EFMD of any major changes in its organisation or in the scope of its activities that occur during the five-year period. Maintenance of accreditation may then depend on a new assessment of the circumstances.

• *Accreditation for three years* with a requirement to make progress in certain specified areas. In these cases, the Learning Organisation will be expected to demonstrate that it has successfully addressed the issues of concern identified by the Accreditation Committee.

• *Deferral* for a period of not more than one year, during which the Learning Organisation must demonstrate that it has successfully addressed certain areas of concern that preclude immediate accreditation. If it fails to satisfy this requirement, the final decision will be Non-Accreditation. The Accreditation Committee may decide that a one-day visit by a two-person team is necessary before a positive accreditation decision can be confirmed.

• Non-accreditation.
2: Maintenance of Accreditation

One of the founding principles of CLIP is that a company’s engagement in the process does not end with successful accreditation. Rather this should be seen as opening up full access to the CLIP community, membership of which is governed by certain rights and duties.

Among the former, there is the right to full membership of the CLIP Steering Committee, the right to serve as a Peer Reviewer for the accreditation of other companies, the right to participate in Steering Committee Task Forces and Sub-Committees such as the CAC, the right to host Sharing Best Practice workshops.

Among the latter, there is the duty to participate regularly in Steering Committee meetings and activities, the duty to share experience with other members, and the duty to commit to continuous development following accreditation.

It is also expected that accredited companies will make the Peer Review reports on their Learning Organisation available to the CLIP community at large, thus contributing to the shared learning experience.

Follow-up after the Accreditation Decision: Five-year Accreditation

The Learning Organisation is required to make a formal presentation to the Steering Committee of its experience in going through the CLIP process (to be scheduled during the meeting following the accreditation decision).

Following the official awarding of CLIP accreditation, the Learning Organisation should draft a written Continuous Development Plan setting out its principal development objectives for the coming years. The plan should be based to a large extent on the recommendations of the Peer Review report.

As evidence that the Learning Organisation is actively working towards the realisation of its Continuous Development Plan it will submit an Interim Report to the Accreditation Committee after two and a half years.

The Interim Report will provide:

- Progress feedback to the CLIP community at the mid-point of the five-year period of accreditation
- Evidence that the Learning Organisation is actively working towards the realisation of its Continuous Development Plan
- Evidence that the Learning Organisation’s circumstances and level of quality are still in conformity with the standards
The main conclusions of the Interim Report will be presented by the Learning Organisation to the Steering Committee for discussion in one of its meetings.

The achievements within the Continuous Development Plan over the five-year period will be assessed during the next Re-Accreditation visit.

**Follow-up after the Accreditation Decision: Three-year Accreditation**

The Learning Organisation is required to make a formal presentation to the Steering Committee of its experience in going through the CLIP process (to be scheduled during the meeting following the accreditation decision).

The Learning Organisation will submit a short annual report to the Accreditation Committee on actions taken and progress made in addressing the specified areas of concern. Feedback will be given by the Accreditation Committee and the EFMD CLIP team.

The Learning Organisation’s success in addressing the specified areas of concern will be assessed in the Re-Accreditation visit at the end of the three-year period.

**Maintenance of Accreditation**

During the period for which CLIP accreditation is awarded – either three years or five years – it is the responsibility of the company to inform the CLIP Steering Committee of any major change in the Learning Organisation’s circumstances that may affect its structure and positioning in the company, the scope of its activities or the quality of its L&D provision.

If such changes occur to the extent that the Learning Organisation no longer conforms to the CLIP standards, the company has one year in which to address the issues to the satisfaction of the Accreditation Committee. Failure to provide evidence that the Learning Organisation still merits the CLIP quality label will lead to discontinuance of the accreditation.

*Nota Bene: The Learning Organisation may request support from the EFMD CLIP team and from the CLIP community of certified companies in pursuing its development objectives.*

**3: The Re-Accreditation Process** ([annex 6])

Periodic re-accreditation is an important part of the continuous development process that inspires the CLIP system. It is an occasion to stand back from everyday operations and take stock of the progress that has been made since the previous review. Above all, it is an opportunity to assess the challenges for the future in a constructive dialogue with peers in the profession.
The re-accreditation process should normally be completed at the end of the three-year or the five-year period following the date of the previous accreditation decision by the Accreditation Committee. Companies may request an extension of the period within which the Peer Review visit must be completed if the circumstances justify the delay. However, the grace period cannot be longer than 12 months beyond the normal 5- or 3-year deadline. Acceptable reasons for such an extension would include a change of leadership in the Learning Organisation or a situation of particular turbulence in the company.

The Self-Assessment Report

In preparation for the on-site visit, the Learning Organisation is required to submit an updated version of the Datasheet and a 15-20 page Self-Assessment report covering the following areas:

1: Major changes since the previous Peer Review
   - Changes in the positioning and strategic mandate of the Learning Organisation within the company
   - Changes in the governance of the Learning Organisation
   - Changes in the scope of the Learning Organisation’s activities (categories of intervention, target markets and audiences)
   - Changes in the portfolio of programmes and activities
   - Changes in the funding model
   - Changes in the internal structure and staffing of the Learning Organisation

2: Quality Improvement and Development since the previous Peer Review
   - Summarise the measures that have been taken to address the issues raised as “Areas for development” in the previous Peer Review Report
   - Companies awarded five-year accreditation should:
     - Report on progress achieved towards meeting the objectives set out in the Continuous Development Plan
   - Companies awarded three-year accreditation should:
     - Explain how they have addressed the areas of concern specified in the previous assessment
   - Summarise other significant quality improvement and development measures that have been taken

3: The current situation
   - Summarise the current situation of the Learning Organisation
   - Present a current SWOT analysis

4: Key challenges for the future
   - Explain the strategic agenda of the Learning Organisation for the coming years
   - Describe the development priorities for the future
The Peer Review Visit (annex 4)

A confirmation visit by a two- or three-person Peer Review team will be organised to validate the Self-Assessment update and to examine the Learning Organisation’s case for renewal of accreditation. The confirmation visit will be scheduled to allow not less than one and a half days of meetings and interviews. This is to be considered a minimum requirement for the on-site visit. In cases where very substantial changes have occurred since the previous visit, a longer time may be necessary. And of course the Learning Organisation itself is free to request a longer visit in order to benefit from a more thoroughgoing Peer Review.

The Base Room

The Peer Review team should be provided with a Base Room in which relevant documents can be laid out for consultation and in which the team can work alone. It should be equipped with computer access and a printer. The Base Room should not be used for interviews.

The Peer Review Schedule (annexes 4 & 5)

As in the case of initial accreditation, the schedule of meetings and interviews must be carefully constructed in advance of the visit. The selection of persons to be interviewed will depend on the context of the re-accreditation review with particular focus on the key strategic challenges faced by the Learning Organisation.

The Peer Review Report

This visit will lead to the drafting of a Peer Review report with a recommendation to the CLIP Accreditation Committee regarding the renewal of accreditation.

The Re-Accreditation Decision

Examination by the CLIP Accreditation Committee of the Learning Organisation’s case for renewal of accreditation. The Committee can decide:

- Renewal of accreditation for a period of five years
  The expectation is that companies that have previously been accredited for three years will have resolved the outstanding issues and will now qualify for five-year accreditation.

- Renewal of accreditation for a period of three years with specified development conditions.

- Deferral for a period of one year.

- Non-renewal.
THE CLIP PROCESS MANUAL

ANNEXES
Annex 1

CLIP Application Form
Application Form
To EFMD CLIP - Corporate Learning Improvement Process

I, the undersigned ____________________________________________ (name)
_________________________________________________________ (position)
representative of ___________________________________________ (name of organisation)
confirm the application of my organisation to go through the EFMD CLIP - Corporate Learning Improvement Process.

We note that the cost of this review process to my organisation will be €40,000. The direct travel and accommodation costs of the peer review team will also be charged to my organisation. We also confirm that we will accept the accreditation process, the results of this process and the decisions of EFMD aisbl respect to the accreditation. EFMD aisbl, its directors, employees and consultants, dependent or independent, voluntary or not, shall not be liable on a tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the accreditation process, the conception and implementation of the standards, systems or procedures, nor for the accreditation decision. The afore-mentioned shall also not be liable for the use by the organisation of the recommendations nor for any delay in the accreditation process.

We fully understand and agree with EFMD’s general terms and conditions below.

General Terms and Conditions
1. The signatory of this Application Form certifies he/she is a representative who is authorised to commit her/his organisation to go through the CLIP Process.
2. Fee Schedule
   The total fee for the CLIP Review is 40,000€
   - Initial payment: 4,000€, due 30 days after the Application
   - Interim payment: 4,000€, due after the onsite visit by the EFMD expert, in case the institution applying is not eligible to enter the process or 16,000€, due after the on site visit by the EFMD expert, in case the institution applying is eligible to enter the process
   - Final payment: 20,000€, due at the submission of the final report to the reviewed institution
3. The reviewed institution will be charged directly by the reviewers for their travel, accommodation and other direct expenses for the on site briefing visit, as well as the peer review visit
4. Invoices and expenses claims shall be paid preferably by bank transfer, free of any bank charges, within 30 days of presentation of the invoice
5. The fees are exempted from Belgian VAT according to art. 196 Directive 2006/112/CE if the member is liable to VAT in another country of the European Union (reverse charge), or if the member is established in a country outside the European Union.
6. In case the institution decides unilaterally to stop the process after the application, a fee of 4,000€ will be charged. Cancellation must be confirmed in writing.
7. The Belgian law shall apply to any and all disputes arising out of the process. In case of dispute, only the courts of Brussels are competent.

Signature: ____________________ Date: ________/_______/__________
Stamp of the organisation:

Organisation: .................................................................
Department: ............................................................... Address: .................................................................
City and Country: ..........................................................
Telephone: .............................. Fax: ..........................

VAT Identification Number (Please provide for invoicing purposes): ........................................
(see art. 5 of General Terms and Conditions on previous page)
Annex 2

CLIP Data Sheet
CLIP Data Sheet

Name of the Company:  

Number of employees in the company  

Name of the Learning Organisation:  

(i.e. Corporate University, Academy, Institute, etc. Where appropriate please give the name both in the language of the country and the equivalent in English)

Year of launch:

Head of the Learning Organisation (Chief Learning Officer, Director, ......):

Name:
Title:
Phone:
Email:

Contact Person if other than the Chief Learning Officer:

Name:
Title:
Tel.:
Email:
Section A
Status and Positioning of the Learning Organisation

Describe the position of the Learning Organisation in the company structure

• Brief history of the Learning Organisation

• Principal Missions of the Learning Organisation

• Position in the company’s organisational structure

• Reporting line(s)

• Interface with HR processes

• Interface with other L&D providers in the company

If necessary, please insert or attach an Organisation Chart
Section B
Governance

Provide a brief description of the structures or mechanisms in place:

1. To ensure continuing alignment with the company’s strategic priorities

2. To ensure appropriate input from key stakeholders within the company

Give details of any Governing Body, Oversight Committee, Advisory Board, or structured link to the main Board
Section C
Structure, Facilities and Resources of the Learning Organisation

- Describe the internal structure of the Learning Organisation as regards Divisions, Departments, Academies, Faculties, Units, etc. (Please attach an Organisation Chart)

- Locations and Facilities (e.g. main headquarters, central training facilities, residential facilities, decentralised training centres, etc.)

- Total Headcount of the Learning Organisation

- Management of the Learning Organisation (Number of persons with managerial responsibility, Roles, Management Committee, etc.)

- Internal Resources (Staff Breakdown)
  - Programme Directors
  - Programme Designers
  - IT Staff
  - Administrative Staff

- Company Resources available for delivery of learning interventions
  - Board members
  - Senior line managers
  - Certified Facilitators/Trainers
  - Etc

- External suppliers
  - Main partners (academic institutions, consulting companies, etc.)

- IT Resources for Training and Learning:
  - Electronic Learning Platforms (LMS):
    - Software Resources
    - Volume and Percentage of learning delivered online

- Funding Model (Cost/Profit Centre; Charges to Business Units/Central HR/Central HQ etc.):
Section D
Scope of Activities and Markets Served

Describe the scope of the Learning Organisations programmes and activities within the company

1. Coverage of the company organisation
   • Corporate level
   • Divisions
   • Business units
   • Geographical regions

For instance, is the Learning Organisation only providing cross-functional, corporate-level programmes that are delivered centrally or does it also design programmes for local delivery in the business units and regions?

2. Categories and Levels of Staff Served:

   Please indicate the principal target groups within the scope of the Learning Organisation’s mandate

   • Senior management
   • Middle management
   • First line managers
   • New recruits
   • High potentials
   • Talent pipeline
   • Functional staff (sales, HR, finance & accounting,.....)
   • Technical staff
   • Etc.

3. External Markets Served:
   • Customers
   • Suppliers

Countries in which the Learning Organisation has a formal presence or a substantial activity (please specify)

4. Principal types of L&D interventions provided for the above target groups

   (For example: change management, cultural integration, leadership development management development, functional skills, personal development, technical training, etc.)
### Section E

<table>
<thead>
<tr>
<th>Key Indicators</th>
<th>For the Learning Organisation</th>
<th>For the company as a whole (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of participants enrolled in learning initiatives per year:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of employees in learning initiatives per year:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of participant days/year:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning Spend as % of payroll:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Nota Bene: Please add any other relevant indicators to portray the volume of training provided*

**PLEASE PROVIDE SUPPORTING DOCUMENTS AS FOLLOWS:**

- A SET OF INSTITUTIONAL DOCUMENTS OR WEBSITE REFERENCES AS APPROPRIATE, IF POSSIBLE IN ENGLISH
- A LIST OF THE PRINCIPAL PROGRAMMES OFFERED (YOU MAY USE THE ATTACHED TEMPLATE)
- A SWOT ANALYSIS REFLECTING THE CURRENT SITUATION OF THE LEARNING ORGANISATION WITH AN INDICATION OF THE MAIN DEVELOPMENT CHALLENGES
Please describe your offerings in a structure you feel appropriate, using the items below as a possible guide. Please indicate target group, duration of activities, number of programmes and participants per year.

<table>
<thead>
<tr>
<th>Programme Name</th>
<th>Duration</th>
<th>Target Group</th>
<th>No. of Prog/year</th>
<th>No. of Part./year</th>
<th>Inhouse/Outsourced</th>
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</thead>
<tbody>
<tr>
<td>Qualification programmes</td>
<td></td>
<td>(e.g. high potentials, senior mgt, middle mgt, sales staff, etc.)</td>
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<tr>
<td>Consortia programmes</td>
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<td>(in collaboration with other companies)</td>
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<tr>
<td>General Management Programmes</td>
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<tr>
<td>Culture Change</td>
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<td>Project Management</td>
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<tr>
<td>Strategy Implementation</td>
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<td>Leadership</td>
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<tr>
<td>Talent Pipeline</td>
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<tr>
<td>Personal Skills</td>
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<tr>
<td>Use of new technologies and e-learning</td>
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<tr>
<td>Coaching and Mentoring</td>
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<tr>
<td>Functional programmes (Finance, Marketing, Sales etc.)</td>
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<tr>
<td>Technical Training</td>
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</table>
Annex 3

The Eligibility Visit Report
CLIP Eligibility Visit Report
Name of the Learning Organisation
Name of the visiting expert
Date of the visit

1. Meeting Schedule for the Visit
   Please include the names and titles of the participants.

2. Adequacy of the Datasheet and supporting material provided

3. Remarks concerning the Learning Organisation that may complete or facilitate the comprehension of the Datasheet.

4. The principal objectives and motivations of the Learning Organisation in applying to enter the CLIP process

5. Satisfaction of the Eligibility Criteria:
   
   5.1 Independent structure
   The Learning Organisation to be assessed is an identifiable, separate unit within the company, under the management of an appointed Learning Officer and with its own staff. The Learning Organisation to be reviewed is more than just a sub-unit of a wider training organisation.

   5.2 Strategic mandate
   The Learning Organisation has a clearly defined mandate to pursue objectives that are linked to the strategy of the company or operating unit.

   5.3 Positioning
   The Learning Organisation is positioned at corporate level within the company or within a major geographical division or business unit

   5.4 Content of the learning and training offer
   The Learning Organisation is providing more than just highly specialised technical training. Its offer should include management development and strategic change objectives. It should, therefore, have a substantial activity in at least one of the following areas;
   - Executive Development
   - Professional Development
o Organisation Development (Change management, Cultural integration)

5.5 Size and scope
The scope of the Learning Organisation’s activities must not be so small that the assessment only focuses on one or two programmes

5.6 Competence in English
Ability to go through the process in English

6. Brief definition of the scope of the Learning Organisation’s programmes and services, including its responsibilities in coordinating and federating the learning function across the overall L&D landscape within the company.

7. Summary of the principal concerns that will require particular attention in the Self-Assessment report and in the subsequent Peer Review.

8. Areas of risk in which the Learning Organisation may not meet the CLIP standards for accreditation.

Annex 4

Logistics Guidelines
CLIP Peer Review Logistics Guidelines for the Reviewed Institution

1. The reviewed institution is expected to make and cover all necessary arrangements for accommodation, local transport and meals for the members of the review team.

2. Please liaise directly with the **EFMD coordinator** (Caroline Malvaux) to confirm all logistic arrangements for the members of the team.

3. The review team will arrange their own international travel and will invoice the reviewed institution after the review unless proposed otherwise by the reviewed institution.

4. **Hotel** accommodation should ideally be arranged close to the site.

5. A **meeting room at the hotel** should be made available during the entire review visit (day 0 to day 2) from 18:00 till 23:00. In case of a social dinner, the meeting room will not be needed (see point 7).

6. The **evening dinners** should ideally be booked at the hotel for the duration of the review.

7. The schedule for the visit involving the team members will be very tight, so maximum use of time is essential. Formal presentations and social events are to be avoided. However, if the reviewed institution wishes to organise a **social dinner** this can only take place at the end of the first day of meetings (day1).

8. There should also be some free time included in the agenda to allow the review team to work alone during the review.

9. **Lunches** should be rapid, involving a minimum of disturbance. There is a definite preference for on-site buffet lunches (catering in the base room).

10. The reviewed institution should make available a ‘**Base Room’** for the duration of the visit. The room provided for the team should:
    - possess a table for laying out documents
    - be equipped with a flip chart
    - provide a telephone, a computer and internet connection
    - be free from disturbance
    - be able to be locked

    **!! This Base Room is not to be used for interviews at all !!**

11. **Interviews** should ideally take place on the same floor or same building as the base room. During the interviews, someone from the reviewed institution should be present at all time for assistance. The interview schedule should be strictly respected.
12. The final Self-Assessment Report (SAR) and the first draft of the Interview Schedule should be sent to the review Team Leader (TL) 2 weeks prior to the visit. EFMD Coordinator should be copied.

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General timing of the visit *for accreditation* review

<table>
<thead>
<tr>
<th>Day 0</th>
<th>around 18:00</th>
<th>Arrival of Peer Review Team</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>19:00 – 22:00</td>
<td>Peer Review Team meeting &amp; dinner in hotel</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 1</th>
<th>9:00 – 18:00</th>
<th>Interviews at the reviewed institution + lunch</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18:00 – 23:00</td>
<td>Peer Review Team meeting &amp; dinner in hotel or Social Dinner</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>9:00 - 18:00</th>
<th>Interviews + lunch</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18:00 – 23:00</td>
<td>Peer Review Team meeting &amp; dinner at hotel</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 3</th>
<th>11:00 – 13:00</th>
<th>Debriefing and Feedback to the reviewed institution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13:00 – 14:00</td>
<td>Optional Lunch</td>
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<tr>
<td></td>
<td>14:00</td>
<td>Leave</td>
</tr>
</tbody>
</table>

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General timing of the visit *for re-accreditation* review

<table>
<thead>
<tr>
<th>Day 0</th>
<th>around 18:00</th>
<th>Arrival of Peer Review Team(PRT).</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>19:00 – 22:00</td>
<td>Peer Review Team meeting &amp; dinner in hotel</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 1</th>
<th>9:00 – 18:00</th>
<th>Interviews at the reviewed institution + lunch</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18:00 – 23:00</td>
<td>Peer Review Team meeting &amp; dinner in hotel or Social Dinner</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>9:00 – 12:00</th>
<th>Interviews (if needed)</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>12:00 – 14:30</td>
<td>Peer Review team finalise report + lunch</td>
</tr>
<tr>
<td></td>
<td>14:30 – 15:30</td>
<td>Debriefing and Feedback to the reviewed institution</td>
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<tr>
<td></td>
<td>16:00</td>
<td>Leave</td>
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</tbody>
</table>
Annex 5

The Peer Review Interview Schedule
Interview Schedule for CLIP Peer Reviews

1. Main Categories of People to be Interviewed (with examples)

- The Reporting Line up to Board Level
  - The CEO – where possible (as has often been the case)
  - Head of Corporate HR (essential if the Corporate University is positioned in HR)
  - For example, the Head of Leadership Development or Talent Management when the Corporate University reports to another unit in Corporate HR

- Major Stakeholders in the Business who are the Corporate University’s clients and who may have been participants in the University’s executive development programmes
  - CEOs of the different Divisions and Business Units in the company
  - Members of the Corporate University’s Governing Body or Advisory Board
  - Directors of major corporate functions (Finance, Sales & Marketing, etc.)

- HR managers from the Business Units with whom the Corporate University interfaces in the management of the participant selection/nomination process
  - HR Directors from the Business Units
  - HR Training Managers
  - HR Business Partners

- Heads of other L&D organisations in the business units or regions with which the Corporate University interfaces

- Directors of other Corporate HR Departments with whom the Corporate University regularly cooperates in the area of people development but to which it does not report hierarchically
  - Talent Management
  - Executive Development

- Members of the Corporate University Staff
  - Programme Designers
  - Unit or Activity Heads (when the University is organised into Departments, Schools, Academies, etc.)
  - IT Support Staff

- Programme Facilitators
  - Line managers from the business
  - Certified Experts from the business
  - Coaches
  - External facilitators (from outside the company)

- Consulting companies, Business Schools and University Faculties to which the Corporate University outsources its programmes
2. **Guidelines for constructing the Peer Review Interview Schedule**

- The CLIP Peer Review takes place over a period of two and a half days, usually from Tuesday morning to Thursday midday. The final half-day is mainly taken up with the preparation and delivery of the concluding feedback. The interviews will, therefore, be mostly scheduled during the first two days of the visit. However, it is possible if necessary to schedule one or two meetings between 9h00 and 10h00 on the last morning.

- The first meeting with the Corporate University’s management team is designed to set the scene for the review and should be scheduled for one and a half hours. It is an opportunity for the Corporate University to set forth its current strategic situation and the principal challenges that it faces in the pursuit of its future development. The CLIP Peer Reviewers will seek clarification on major issues that have emerged from their reading of the Self-Assessment report regarding the University’s strategy, organisation, resource base and portfolio of programmes and services. To some extent this meeting sets the broad agenda for the subsequent meetings since it puts on the table the Peer Reviewers’ main concerns as they begin the assessment process.

- For the subsequent interviews a choice must be made as to whether the Peer Reviewers should all remain together or whether they can be split into two pairs allowing two parallel interview sessions within a given time slot. As a rule of thumb the four-person team should remain together when all members need to hear what is said during the meeting because of its importance in understanding key strategic issues. This will usually depend on the seniority of the persons being interviewed (CEO, Head of Corporate HR, other senior executives).

- The first day should be devoted as far as possible to a discussion of major strategic issues with top management and major stakeholders from the business units. It is also important for the Peer Reviewers to have a clear understanding of the portfolio of programmes and services before they talk to facilitators and participants. The second day will, therefore, focus more on operational issues of programme design, pedagogy, participant management, etc.

- It is usually necessary to schedule many of the interviews by telephone or video conference. In the CLIP experience the telephone option is usually sufficient and is less time consuming technically.

- Face-to-face interviews should not be scheduled for less than 45 minutes. Telephone meetings are usually scheduled for 30 minutes.

- Time must allowed in the schedule for breaks during which the Peer Reviewers take stock of their progress and for movement from room to another between interview sessions.

- The meetings for each day should begin at 8:30 or 9:00 and end no later than 17:30

- Lunch is usually an opportunity for the Peer Review team to debrief among themselves rather than to meet other people. It should last no longer than one hour, preferably with a buffet lunch or luncheon tray that require no service during the hour.

- In some cases the company may wish to organise a social event or dinner with the Peer Reviewers. This should be scheduled on the evening of the first day of interviews, usually the Tuesday evening.
The Peer Reviewers will meet alone before, during and after dinner to construct their assessment at the end of the second day of interviews, usually on the Wednesday evening.

Annex 6

Application Form for Re-Accreditation
Application Form
To EFMD CLIP - Corporate Learning Improvement Process Re-accreditation

I, the undersigned ___________________________________________ (name)
__________________________________________________________ (position)
representative of
__________________________________________________________ (name of organisation)
confirm the application of my organisation to go through the EFMD CLIP - Corporate Learning Improvement Process Re-accreditation
We note that the cost of this review process to my organisation will be €20,000. The direct travel and accommodation costs of the peer review team will also be charged to my organisation. We also confirm that we will accept the reaccreditation process, the results of this process and the decisions of EFMD aisbl respect to the reaccreditation. EFMD aisbl, its directors, employees and consultants, dependent or independent, voluntary or not, shall not be liable on a tortious or contractual basis for any direct or indirect, foreseeable or unforeseeable damages resulting from the reaccreditation process, the conception and implementation of the standards, systems or procedures, nor for the reaccreditation decision. The afore-mentioned shall also not be liable for the use by the organisation of the recommendations nor for any delay in the reaccreditation process.

We fully understand and agree with EFMD’s general terms and conditions below.

General Terms and Conditions
1. The signatory of this Application Form certifies he/she is a representative who is authorised to commit her/his organisation to go through the CLIP Process.
2. Fee Schedule
   The total fee for the CLIP Review is 20,000€
   Initial payment: 4,000€, due 30 days after the Application
   Final payment: 16,000€, due at the submission of the final report to the reviewed institution
3. The reviewed institution will be charged directly by the reviewers for their travel, accommodation and other direct expenses for the onsite briefing visit, as well as the peer review visit
4. Invoices and expenses claims shall be paid preferably by bank transfer, free of any bank charges, within 30 days of presentation of the invoice
5. The fees are exempted from Belgian VAT according to art. 196 Directive 2006/112/CE if the member is liable to VAT in another country of the European Union (reverse charge), or if the member is established in a country outside the European Union.
6. In case the institution decides unilaterally to stop the process after the application, a fee of 4,000€ will be charged. Cancellation must be confirmed in writing.
7. The Belgian law shall apply to any and all disputes arising out of the process. In case of dispute, only the courts of Brussels are competent.

Signature: ____________________ Date: ________/_______/__________

Stamp of the organisation:

Organisation: …………………………………………………………………………
Department: …………………………………………………………………………
Address: ………………………………………………………………………………
…………………………………………………………………………………………
City and Country: ……………………………………………………………………

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Telephone: .............................. Fax: .................................

VAT Identification Number (Please provide for invoicing purposes): .................................
(see art. 5 of General Terms and Conditions on previous page)