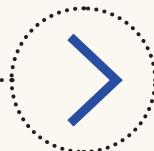# Efficacy Framework

A PRACTICAL APPROACH TO IMPROVING LEARNER OUTCOMES

PEARSON

About Pearson

Pearson is the world's leading learning company.

Our education business combines 150 years of experience in publishing with the latest learning technology and online support. We serve learners of all ages around the globe, employing 45,000 people in more than 70 countries, helping people to learn whatever, whenever and however they choose.

Whether it's designing qualifications in the UK, supporting colleges in the US, training school leaders in the Middle East or helping students in China learn English, we aim to help people make progress in their lives through learning.

Learn more at pearson.com

TABLE OF CONTENTS

THE PEARSON EFFICACY FRAMEWORK

We all spend lots of time thinking about how to support learners in reaching their goals. But how do you know whether you will achieve the learner outcomes you want? At Pearson we have designed the Efficacy Framework, a tool that uses a tried and tested method to help understand how products or services can achieve their intended outcomes or results.

Our Efficacy Framework asks questions that are designed to help you to explore what efficacy means and identify any barriers to delivering your desired outcomes for your learners. It will also help you to identify possible ways to improve your product, service or class so that it has a better chance of delivering high quality learning, and therefore making a greater impact on lives.

THE FRAMEWORK HAS FOUR SECTIONS:

1. Outcomes
2. Evidence
3. Planning & Implementation
4. Capacity to deliver

In each of these sections you will need to consider three areas that contribute to a product or service's efficacy and answer questions about different factors that affect efficacy. You answer these questions by assigning a colour rating. At each stage you will be given guidance on what these colour ratings mean and shown some worked examples for you to assess your own product or service against. There's space for you to make notes too.

At the end of each section, you will need to review your answers and select a summary rating. Then, when you have been through the whole Framework, you should select one overall rating. This final rating will be based on your judgement, and on your answers to the questions in each of the sections. There is no wrong answer, and the final report will only be for your use, although you may want to share it with colleagues.

You might like to revisit the Framework in the future to check your scores and keep track of your progress.

YOU WILL NEED

- Access to information about your product, including data on outcomes, feedback from users, and business or implementation plans.
- About 40 minutes of your time.

INSTRUCTIONS

At the start of each section, first read the list of things to consider and start to think about how you might answer these for your product or service. Then read through the criteria for each colour rating: these will help you to decide which rating best represents the current status of your product or service.

To give you a clear idea of what these ratings mean, we've also provided some example feedback on imaginary education programmes. This shows the sorts of statements you would be able to make if achieving each rating.

Once you've read through the considerations and examples, select a colour rating for that question. When you have done this, you will also need to select an overall rating for the whole section drawing on your judgements for each question. We'd suggest you make some notes in the rating box to explain your choice.
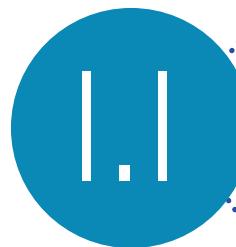
I
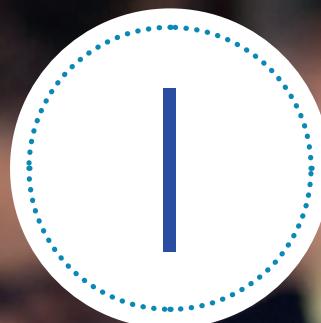
OUTCOMES

IN ORDER TO HAVE A MEASURABLE IMPACT ON LEARNING OUTCOMES, YOU NEED TO BE CLEAR ABOUT WHAT YOU ARE AIMING TO ACHIEVE.

Your outcome should describe the exact skill, behaviour and mindset your product or service aims to improve. It should also describe who exactly will benefit and how ambitious it is.

1.1

INTENDED OUTCOMES

THINGS TO CONSIDER

Have you identified specific outcomes for your target group?

Do you have a way to measure the intended outcomes?

Do you have ambitious and measurable targets in place, and deadlines for achieving them?

Are your intended outcomes clearly documented and understood by the relevant people within and outside your organisation?

GREEN RATING

- All outcomes are specific and clearly documented.
- People within and outside my organisation understand the intended outcomes and are able to communicate them clearly.
- Future targets are ambitious and achievable.
- Outcomes can be regularly measured against set targets.

EXAMPLE FEEDBACK

This maths curriculum is intended to improve student proficiency in core maths topics (algebra, calculus etc.) by one grade level, in 70% of the time typically needed to do so.

In order to track student proficiency in core maths topics, our team has identified and actively collects a range of data including end-of-year exam results, and real-time data on the speed with which students answer questions.

Our team has set short- and long-term targets that are ambitious, but which we believe can be achieved.

Our entire team is dedicated to reaching these outcomes, and opens each meeting by checking on our progress against targets.

AMBER/GREEN RATING

- Most outcomes are specific and clearly documented.
- Some ways of measuring progress have been identified, but they might not be comprehensive.
- We have set future targets, but they are not very specific, or may be too easy or too ambitious.
- Nearly all the relevant people within and outside my organisation agree with and can communicate our intended outcomes.

EXAMPLE FEEDBACK

This maths curriculum is intended to improve student proficiency in core maths topics (algebra, calculus etc.) in less than the time typically needed to do so.

In order to track student proficiency in core maths topics, our team has identified a handful of metrics to use, largely relying on end-of-year test results.

Students have made real progress, but our future targets will only maintain their current level of achievement, not improve it.

Our team is continuing to clarify and refine our outcomes, and to ensure that we communicate them clearly and consistently when meeting with external stakeholders.

AMBER/RED RATING

- Some outcomes have been identified, but they are not specific.
- Our team has not identified ways to measure progress against all outcomes and sub-outcomes.
- Future targets are vague, or are not ambitious or achievable.
- Some but not all team members (both within and outside my organisation) agree with and can communicate our intended outcomes.

EXAMPLE FEEDBACK

Our team agrees that this maths curriculum should improve student proficiency in maths topics.

The maths curriculum collects only some of the data that we need to measure progress against our outcomes, and we are working to find other sources of information.

We have set future targets for the product, but they are not ambitious enough and ask only that students proceed 'at a reasonable pace'.

There is disagreement among our team members and other key stakeholders about when targets should be reached.

RED RATING

- Outcomes are not documented or specific.
- People within and outside my organisation do not understand the intended outcomes or communicate them in the same way.
- Targets do not exist to measure outcomes against.
- Outcomes are only defined at a high level.

EXAMPLE FEEDBACK

This maths curriculum was changed in response to a change in local regulatory standards, and the team is not clear on what the value to the learner will be.

There has been a strong focus on the requirements of the 'customer' (e.g. the district administrator), but no focus on how this will impact learners' lives.

We have focused only on maintaining our current performance and have not discussed our ambitions for the future.

The team has not set targets for learners, and the way we talk about the product is inconsistent.

YOUR RATING

1.2

OVERALL DESIGN

THINGS TO CONSIDER

Is the product designed in a way that will most effectively help your target group to reach their goals?

Does the design allow you to automatically collect evidence of your progress?

Have you adapted the design based on feedback from users?

Could the design be used by others?

GREEN RATING

- Design is superior to other options/ competitors and has features focused on the delivery of outcomes.
- Real-time evidence is generated.
- The design can be adapted and developed.
- Others could use this design, and it has been shared with them.

EXAMPLE FEEDBACK

This maths curriculum is held up by our users (K-12 teachers) as an extremely high-quality product, with personalised features to ensure students advance at an appropriately challenging pace.

Real-time data collection is built into the solution.

Our team received and incorporated several rounds of feedback from education experts during the design process about how the product could be designed to best deliver outcomes.

Teams in other parts of my organisation have replicated this design.

AMBER/GREEN RATING

- Our design is better than other options/competitors.
- The product/service captures some data automatically.
- Our team's design process is thorough and adaptive.
- Other parts of my organisation are interested in our design, but might not be planning to replicate it.

EXAMPLE FEEDBACK

K-12 teachers and administrators favour our maths curriculum product in a competitive marketplace.

We track fewer metrics and collect less real-time evidence of progress than several other options on the market.

Our team solicited feedback from a variety of people during the design process, and continues to improve the original design based on this feedback.

Other teams have asked about our process for gathering and using feedback, but none have duplicated it.

AMBER/RED RATING

- Parts of the design are strong but the overall design is similar to other options.
- The design lacks a way to collect feedback and evidence.
- Our team's design process is not as thorough and adaptive as it could be.
- Other parts of my organisation are not interested in replicating our design.

EXAMPLE FEEDBACK

Though we have worked to keep this maths curriculum up to date, better products continue to come to market.

Our data collection is extremely limited.

Our users have provided feedback to improve the quality of our design, and the product is being updated to address this feedback.

Other parts of my organisation are not interested in replicating our design, and it would probably not work effectively in a different context.

RED RATING

- The design does not meet target group expectations and is difficult to use.
- The design does not reflect intended outcomes.
- The design does not allow for the collection of feedback.
- The design is specific to a local situation and cannot be replicated.

EXAMPLE FEEDBACK

Teachers struggle to implement this maths curriculum, saying that it is difficult to navigate and does not help them to achieve their learning goals.

The product cannot collect even basic data on learner outcomes to assess progress.

The product was not designed in an adaptive way by our team, so it does not reflect user feedback.

Our team would not recommend that other parts of the business replicate this design until we have improved it.

YOUR RATING

1.3

VALUE FOR MONEY

THINGS TO CONSIDER

Do you understand the benefits of your product or service to your target group, relative to other options?

Is the cost of the product/service competitive, considering the benefits it would deliver?

GREEN RATING

- Feedback/research has allowed me to identify what benefits the product/service needs to deliver for users.
- Feedback and return-on-investment research shows that the cost of the product/service reflects the benefits delivered.

EXAMPLE FEEDBACK

Conversations with our target group focus on how this maths curriculum can improve learner outcomes, and those who use it fully understand the value.

Prior to launching the product, we conducted extensive research to understand what unique value our maths curriculum could provide.

AMBER/GREEN RATING

- The benefits of using our product/ service are understood by people inside and outside our organisation. We have some idea of what our target group needs, and have frequent conversations with users about our products and services.
- Our cost for users reflects what we know about other options and the benefits our products/services offer.

EXAMPLE FEEDBACK

We talk to our target group about what this curriculum can offer to improve learner outcomes, although they cannot all articulate the unique benefits of our product.

Before launching the product, we conducted some research into other offers in this space, but this research has not been updated since launch.

AMBER/RED RATING

- Our team believes that our products/ services provide benefits, but specific benefits are not clearly understood among our team or by our target group, and we do not have much feedback on the product/service from an outside perspective.
- Our costs seem appropriate to the market, but we have a limited understanding of other offers.

EXAMPLE FEEDBACK

Although our team believes that this maths curriculum can improve learner outcomes, our target group does not understand the benefits of this product, and we struggle to articulate what makes it unique.

Before launching the product, we felt that our intended costs seemed appropriate to the market, but did not conduct in-depth analysis of our target group's needs and limitations.

RED RATING

- No feedback from users exists (either formal or informal), and the benefits of using this product/service are unclear to our team and our users.
- Perceptions of value for money and user experience are poor.

EXAMPLE FEEDBACK

Within our team and during our conversations with our target group and existing users, there is no clear understanding of the value and quality of this product.

Our product is significantly more costly than others, but we have not articulated its unique value in conversations with colleagues or learners.

YOUR RATING

SUMMARY RATING FOR SECTION 1

2

EVIDENCE

A WELL-DESIGNED SOLUTION REQUIRES EVIDENCE OR PROOF THAT YOU CAN ACHIEVE THE INTENDED OUTCOME.

Your evidence should be high quality, comprehensive and consistently applied to constantly improve the design of your solution.

2.1

COMPREHENSIVENESS OF EVIDENCE

THINGS TO CONSIDER

Do you collect evidence using a range of methods (quantitative, qualitative, internal and external for example)?

Do you collect evidence for all stages of your product/service (from early conception to design and then to implementation)?

Do you have evidence from all users of your product/service?

GREEN RATING

- A wide range of evidence has been collected via internal/external, and quantitative/qualitative methods.
- Evidence relates to all stages of my product/service.
- Evidence exists from all users.

EXAMPLE FEEDBACK

Our team designed an English language learning product using a broad variety of evidence on what works, including white papers, data analysis, and interviews with teachers and other users.

We embedded evidence into the initial product design as well as our implementation plans. The programme evolved as we learned what users could do to ensure the product delivered its English language proficiency outcomes.

We collect and analyse evidence from all users of the products, including teachers, students, and other stakeholders where appropriate.

AMBER/GREEN RATING

- More than one type of evidence exists, but we could do with more quantitative evidence.
- Evidence exists from more than one but not all stages of my product/service.
- Evidence exists from some but not all users, and focuses on some but not all aspects of the product/service.

EXAMPLE FEEDBACK

Our team designed an English product based on their conversations with users and expertise within our organisation.

The design process was informed by evidence in its early stages, but became less evidence-focused as time went on.

We currently collect evidence from our core users, but not from all groups of stakeholders that might interact with the product.

AMBER/RED RATING

- Some evidence exists in a qualitative or quantitative form.
- Evidence exists for one of the product/service life cycle phases (early concept, design or implementation).
- Evidence is drawn from a small group of qualified people, and only on one aspect of the product/service.

EXAMPLE FEEDBACK

This English product was designed primarily by a small team within my organisation, with little outside research and limited interaction with the students who would be using the product.

The design process included evidence that was only applicable to very early product concept phases, after which we stopped all research.

The limited evidence our team gathered only addresses the reading components of the curriculum, and does not touch on speaking or writing (the subjects on which many of our target group focused).

RED RATING

- Evidence is collected via a limited range of methods and does not balance qualitative and quantitative sources.

- Evidence is mainly anecdotal and patchy, and does not take into account the product/service's life cycle, features, or users.

- Evidence from target group does not exist, either about their needs or the specific product/service.

EXAMPLE FEEDBACK

We considered only anecdotal evidence when coming up with the concept for this new English language product.

What little evidence exists did not inform all aspects of the design of this product.

Our evidence does not include data about students, teachers, and other external users that rely on the product.

YOUR RATING

2.2

QUALITY OF EVIDENCE

THINGS TO CONSIDER

Does the evidence you have collected link directly to what you are trying to achieve?

Is the evidence you have collected
– unbiased?
– applicable to your product/service?
– recent?
– and does it measure success over a period of time?

Is the evidence you have collected relevant, representative and where possible at an individual level?

GREEN RATING

- The evidence collected effectively proves how well we are meeting our objectives.

- Rigorous research methods have been used. Evidence relates to the specific and relevant use of the product/ service. Evidence was gathered over a period of time.

- Evidence tells a fair and representative story of how an individual learner can progress as a result of using our product/service.

EXAMPLE FEEDBACK

When designing the English product, we considered the intended outcomes of increasing fluency, confidence and communication, and ensured that we linked our evidence to these goals.

We worked with experts to carefully vet all research used during product development to ensure it was recent, applicable and unbiased, and that evidence will be gathered over the entire period that students use the product.

Our evidence will show us how learners should and do interact with the programme.

AMBER/GREEN RATING

- Evidence proves how well we are meeting our objectives.
- Research methods are good, but there are still issues with at least one of the following:
  – biased evidence
  – outdated evidence
  – irrelevant evidence.
- The evidence tells a mostly fair story about how an individual learner could progress as a result of using this product/service.

EXAMPLE FEEDBACK

When designing the product, we considered the intended outcomes and ensured that we linked our evidence to what learners needed to achieve when using this product.

Our team examined all research to check for bias and outdated information, although some of the evidence was not immediately applicable to our outcomes.

The evidence that we rely on will be gathered with some regularity as students use the product, and will give us a reasonable idea of how some groups of learners can be expected to progress.

AMBER/RED RATING

- The evidence proves how well we are meeting some, but not all, of our objectives.
- Our research methods are good but there are still issues with at least two of the following:
  – biased evidence
  – outdated evidence
  – irrelevant evidence.
- The evidence can prove how well some groups of learners progress as a result of the product/service, but is not representative of all learners.

EXAMPLE FEEDBACK

Our team used limited evidence during their design process, but some of the qualitative data can be linked back to the intended outcomes of increasing student confidence.

Although our evidence base is largely unbiased, some of our key sources are out of date or irrelevant.

Our team has identified evidence that applies to some groups of students that will use our product, but we are not sure whether we can apply that evidence to all potential users.

RED RATING

- The evidence that does exist is not directly linked to what I am trying to achieve.
- The evidence that exists is:
  - biased
  - not from a relevant use of the product/service
  - out of date.
- The evidence is not representative of how a learner would use this product/service.

EXAMPLE FEEDBACK

Our team used limited evidence in the design process, and the evidence we did use does not really relate to outcomes of achieving proficiency in the English language.

The evidence used was from a source considered to be highly controversial in the English language community, and would not stand up to outside criticism.

We do not feel comfortable that the evidence used during the design process is representative of how this product would be used by learners.

YOUR RATING

2.3

APPLICATION OF EVIDENCE

THINGS TO CONSIDER

Is the evidence stored and accessible to relevant people? Is it available in an electronic and searchable format?

Has the evidence you have collected been analysed to help inform the design of your product/service?

Has the evidence you have collected been analysed to help inform other decisions about your product/service?

GREEN RATING

- All evidence is readily accessible and searchable.
- The evidence is used regularly to inform the design of my product/service.
- Collected evidence is also used to inform non-design decisions.

EXAMPLE FEEDBACK

We developed an electronic research management system for our product, where all team members can access and upload relevant evidence.

We use these files during design meetings and regularly review findings and trends as part of our analysis.

The evidence that we collected also informed our own performance management process, which was developed alongside our product.

AMBER/GREEN RATING

- Most evidence is accessible and searchable by the team.
- Most design decisions were informed by available evidence.
- The team considers available evidence when making non-design choices throughout the product/service's life cycle.

EXAMPLE FEEDBACK

We have a central repository of evidence, although some files have not been uploaded and others are difficult to search.

Our team feeds analysis of evidence into the design process.

Our team factors research into other, non-design decisions throughout the product's life cycle.

AMBER/RED RATING

- Limited amounts of evidence are accessible and searchable by the team.
- Some design decisions were informed by available evidence.
- Evidence does not usually factor into our team's non-design processes, such as technical implementation and performance management.

EXAMPLE FEEDBACK

Our team set up a central repository of evidence early on, but used it infrequently, and most evidence is now only available via hard copy.

Our team uses evidence in the design process when prompted to do so, but it does not systematically inform our decision-making process, even when evidence is available.

Beyond discussing evidence during product design meetings, it is rarely raised as a factor in our team's decision-making.

RED RATING

- The evidence that exists cannot be accessed quickly via electronic means.
- The design of my product/service has not been changed as the result of evidence.
- Major decisions about my product/service are not underpinned by evidence.

EXAMPLE FEEDBACK

We do not have a central repository of evidence, and what evidence exists is not stored electronically.

We have not comprehensively analysed available evidence, so it has only been reflected in product design in a superficial way.

Our technical implementation plan did not reflect evidence, though it could have been improved substantially through research.

YOUR RATING

SUMMARY RATING FOR SECTION 2

3

PLANNING & IMPLEMENTATION

ACHIEVING YOUR INTENDED OUTCOMES TAKES DEDICATED WORK AND CAREFUL PLANNING.

This is why the Efficacy Framework prompts you to think about the plans, governance and systems you have in place to deliver them.

3.1

ACTION PLAN

THINGS TO CONSIDER

Do you have a plan in place to achieve your outcomes, including milestones, actions, responsibilities and timelines? Is it easy to access and update?

Does your plan include short- and long-term priorities?

Have you identified any potential risks and included actions to mitigate these in your plan?

Do you regularly update your plan and communicate changes to relevant people/institutions?

GREEN RATING

- An electronic plan exists with clearly identified steps, responsibilities and deadlines.
- The plan includes short- and long-term priorities.
- The potential risks, and the actions required to mitigate them, have been identified.
- The plan is regularly updated and all relevant parties are aware of the changes.

EXAMPLE FEEDBACK

During the development of a new maths curriculum our team drafted a detailed action plan for how we would make our intended outcomes a reality, including roles, steps and deadlines.

Our plan clearly specifies short- and long-term priorities for all team members.

We have an established means to track risks, such as a risk log, and have strategies to reduce risks such as changes in the regulatory environment and technical issues for users.

These documents are easily available and accessible to all team members, including technical support staff and other key experts outside the product development team.

AMBER/GREEN RATING

- An electronic action plan exists with steps and realistic deadlines.
- Our team has identified short- and long-term priorities, although they might not all be documented in the plan.
- Our team actively mitigates potential risks.
- The plan is up to date and has been shared with the whole team.

EXAMPLE FEEDBACK

During the development of a new maths curriculum, we drafted an action plan for how we would make our intended outcomes a reality.

Each team member knows and understands their short- and long-term priorities, though not all team members have documented these in the action plan.

Our team does not have an active risk log, but takes steps to quickly and effectively address risks that we know are on the horizon. However, someone coming new to the project would not be able to access our assessment of risks quickly and easily.

Action plan documents are shared with the whole team.

AMBER/RED RATING

- An action plan exists but it is unrealistic, incomplete, or out of date.
- Our team understands our short- and long-term priorities, but these are not reflected in our day-to-day activities or our action plan.
- Our team has identified major risks but not yet created or followed a risk reduction plan.
- The plan is not regularly updated or shared with the whole team.

EXAMPLE FEEDBACK

Our team developed an action plan to reach our intended maths achievement outcomes, but we have not updated it since the product was piloted.

Our team members seem to understand their short-term priorities, but we do not have explicit conversations about how those relate to long-term goals or day-to-day decision-making.

As the regulatory environment has changed rapidly, our team is aware of major risks that exist, but have not created strategies to reduce risks.

Because the plan has not been updated in several months, our leadership has decided not to continue sharing it with the product team.

RED RATING

- No electronic plan exists.

- Our plan is informal, with actions, responsibilities and timelines unclear. Priorities and milestones are also unclear and are either too ambitious or not stretching enough.

- Potential risks have not been formally identified or planned for.

EXAMPLE FEEDBACK

Our team has not developed an action plan.

Activities are informal and ad hoc, addressing issues and risks only as they arise, with unclear responsibilities and deadlines.

During a significant technical problem at a user site, our team was not clear about how to balance short-term needs with long-term priorities, and were unsure of our roles. In the future, we need to be more ambitious in setting priorities. Though several major issues have arisen, we have not identified or planned for future risks as a team.

YOUR RATING

3.2

GOVERNANCE

THINGS TO CONSIDER

Do people within and outside your organisation understand who is responsible for decision-making regarding your product/service?

Have you documented who is responsible for the work, and who should be consulted and informed? Do the relevant people understand this?

Have you identified the key processes required to implement your product/service and are these clearly documented?

GREEN RATING

- Team members know who makes decisions, and each member of the team (within and outside my organisation) is clear about their role.

- The processes we have in place are documented and well understood, and new members of the team are fully briefed.

- We have identified and streamlined critical processes to promote efficiency and collaboration.

EXAMPLE FEEDBACK

While creating our action plan, we developed a roles and responsibilities list to outline the roles of each team member in major decisions (including those outside our organisation).

Our roles and responsibilities list includes lead internal and external decision-makers, as well as who should be consulted and informed in all work.

Following a review of our day-to-day processes, we made a number of changes to make sure we are running efficiently and that we know what we need to do to achieve our outcomes.

AMBER/GREEN RATING

- Team members can articulate who makes most decisions regarding this product/service.

- Members of our team are clear about their role in major decisions (including where they lead, and where they should be consulted or informed), but we need to help people outside of our organisation understand these roles better.

- The team processes are mostly efficient, but we could do a better job of documentation or streamlining to improve efficiency further.

EXAMPLE FEEDBACK

While creating their action plan, our team developed a high-level overview of who makes which decisions, although more specific details were not included (such as who should be consulted on specific design decisions).

Our main users are K-12 teachers, and the role of these teachers and administrators is usually, but not always, clear.

During a review of whether our processes were efficient, we identified areas where we could streamline communications with local administrators, and will work to do so in the future.

AMBER/RED RATING

- Team members can articulate who makes some decisions, but may not fully understand how or when.

- Members of our team are clear about their role in major decisions, but people outside of my organisation need to understand their roles better in order to deliver our intended outcomes.

- Key processes are explained to new team members but are not always efficient or collaborative.

EXAMPLE FEEDBACK

Our product development team meets regularly and most members know who makes which decisions, though they do not always understand how.

The decision-making process remains relatively informal and has been confusing at times in the past, particularly when we relied on decisions from external stakeholders.

The roles of our teachers and administrators are not always clear, and new team members and stakeholders have a hard time understanding the way we work.

RED RATING

- Team members do not know who makes key decisions.
- The roles of people outside of our core team are poorly defined.
- New team members are unclear of key processes and do not have documentation to refer to.

EXAMPLE FEEDBACK

Decisions are made on an ad hoc basis, with little understanding of who makes decisions, how, and when.

New team members are confused about their roles and our general processes, and teachers and administrators do not understand their roles in our processes either.

YOUR RATING

3.3

MONITORING AND REPORTING

THINGS TO CONSIDER

Do you update your plan based on progress, adapt it where necessary and communicate this with your stakeholders?

Do you get/have access to real-time feedback from your users?

Do you identify issues early, discuss these honestly and find solutions?

Do you have tools and routines in place to monitor progress (such as e-mails, calls, meetings, document-sharing)?

GREEN RATING

- Our action plan is updated as necessary and frequently shared with all team members.
- Data is collected in real time and analysed to provide feedback.
- Monitoring of the product/service alerts me to issues in real time.
- Tools and routines are in place to identify and solve problems.

EXAMPLE FEEDBACK

Our team regularly revisits and updates our action plan based upon our progress to date.

Following completion of maths learning modules, the students and teachers using our product provide feedback about the quality of the lesson through electronic surveys.

Our team actively monitors the survey results and works to resolve issues in real time.

We have weekly meetings with our users to track performance against key metrics, and use these sessions to problem-solve as issues arise.

AMBER/GREEN RATING

- Our action plan is updated as necessary, and the team is working to increase how often it shares the plan with the broader team.
- Feedback from our users exists but it is collected manually, which is a time-consuming process.
- Our team recognises issues but doesn't always solve them.
- Routines are in place to raise and solve problems.

EXAMPLE FEEDBACK

Our team regularly considers and updates our action plan during meetings, and in the future we hope to do a better job of sharing it frequently.

Following completion of monthly maths courses, the students and professors using our product provide feedback about the quality of the lesson through a lengthy, time-consuming survey.

Our team has used these surveys to identify issues in the past, but struggled to find solutions.

We have weekly meetings with our users to track performance against key metrics, and use these sessions to problem-solve as issues arise.

AMBER/RED RATING

- Our team developed an action plan, but does not regularly update or share it.
- Feedback from users exists but is delayed and potentially out of date.
- We recognise issues but do not always respond to them.
- Some team tools and routines exist to monitor progress.

EXAMPLE FEEDBACK

Our team created an action plan early on in the development process, but used it only a handful of times since implementation began, and many sections are now out of date.

Following completion of yearly maths courses, the students and teachers using our product provide feedback about the quality of the lesson through a lengthy, time-consuming survey with a very low completion rate.

Our team has sometimes identified issues in the past, but has not yet adopted a problem-solving and proactive mindset.

Issues are generally flagged during weekly e-mail check-ins within the internal team.

RED RATING

- Our action plan has not been updated and adapted.
- Where feedback exists, it is delayed.
- Our team is unaware of issues or fails to act on them.
- Team routines are informal and not focused on monitoring progress.

EXAMPLE FEEDBACK

Our team did not create a comprehensive action plan early on in the project, and what we did create is now entirely out of date.

The students and professors are not regularly surveyed about their perception of our maths product.

Our team is unable to identify and solve issues.

Our team's check-ins are irregular and do not include discussions about hard data.

YOUR RATING

SUMMARY RATING FOR SECTION 3

4

CAPACITY TO DELIVER

IN ORDER TO ACHIEVE YOUR INTENDED OUTCOMES, EVERY PERSON INVOLVED IN THE PROJECT WILL NEED TO HAVE THE CAPABILITIES, RELATIONSHIPS AND SUPPORT TO DRIVE RESULTS.

This section prompts you to think about whether you have the resources (time/people/budget etc.) and abilities you need to deliver these outcomes.

4.1

INTERNAL CAPACITY AND CULTURE

THINGS TO CONSIDER

Does your organisation have the right number of people, and people with the right skills to enable you to deliver your desired outcomes?

Does your organisation have a culture focused on delivering outcomes, and is it collaborative and innovative?

Does your organisation have enough budget to support this?

Do leaders within your organisation support your work and are there opportunities to work with others across the organisation?

GREEN RATING

- Our team has the right number of people, and they have the appropriate skills and experience.
- Our culture is focused on delivering outcomes, and is collaborative and innovative.
- Our team has an appropriate budget.
- Leaders across the organisation understand and support our work.

EXAMPLE FEEDBACK

While developing a programme to help students become proficient in the English language, our team undertook a detailed assessment to identify their areas of strength and where they needed more support.

This helped them deliver their intended outcomes of increasing fluency, confidence and communication.

Our team evaluated its current budget and determined that it had appropriate resources in light of our action plan.

Our team has a very collaborative culture, and receives recognition from around our organisation for our proactive attitude, teamwork and excellent people development.

AMBER/GREEN RATING

- Our team is the right size and has the right skills and talents, but it would be hard to continue operating at this standard if certain team members leave.
- Our culture is relatively outcome-focused, collaborative and innovative.
- Our team has an appropriate budget to meet our intended outcomes.
- Though we have limited support from across the organisation, we hope to improve this in the future.

EXAMPLE FEEDBACK

During the product development process for a new English programme, our team undertook a detailed assessment to identify our areas of strength and whether we could meet deadlines in light of our resources.

We found that, for the most part, we were capable of meeting our timelines and goals.

Our team determined that we had the right financial support in light of our outcomes and action plan.

We are now focusing on building succession plans in case team members leave, and on working across the organisation to observe and share best practices and to build a broader support network.

AMBER/RED RATING

- Our team either has skill gaps or is not big enough for the amount of work that needs to be done.
- The efforts of the team are valued, and we are starting to focus on outcomes.
- Our team has a mostly appropriate budget and we believe we will be able to meet our goals and timelines.
- We have little support and few trusting relationships from across the organisation more broadly.

EXAMPLE FEEDBACK

During the product development process for a new English programme, our team identified major gaps in our technical knowledge.

We found that it would be difficult to deliver our intended outcomes unless we filled these gaps prior to implementation.

We found that the issue was not a budget shortage or a culture problem, but rather that our team was not receiving adequate training and support.

Our team has limited relationships with other teams across our organisation, so we are now focusing on outreach and collaboration, as well as on building our technical skills.

RED RATING

- Our team lacks the appropriate skills and resources to deliver the desired outcomes.
- Our culture feels negative, traditional and not focused on outcomes.
- Our budget is very low relative to what we need.
- Our team has no strong relationships with the rest of our organisation and receives limited support.

EXAMPLE FEEDBACK

It was clear during the product development process that our team does not have the skills needed to implement this product, and we haven't yet tried to improve these skills.

We would describe the environment as highly competitive and focused on individual advancement rather than collaboration.

Our budget is too small to support implementation of this product.

We lack relationships with parts of the organisation that have the expertise and resources we need.

YOUR RATING

4.2

USER CAPACITY AND CULTURE

THINGS TO CONSIDER

Do the target group understand the objectives and their roles in achieving them?

Does the product/service reflect the user's skillset and available resources?

Do users have the people, skills, time and resources to achieve their goals?

Have you put measures in place to build users' skills?

GREEN RATING

- The target group understand the objectives and their roles.
- The product/service takes the user's skillset into account and there are mechanisms in place to build skills.
- Users have the appropriate resources to achieve their goals.
- If we find that users do not have the skills or resources needed to implement this product/service, we have measures in place to provide support.

EXAMPLE FEEDBACK

Our team meets frequently with our target group to ensure that they understand how to use the product and what it should help them to achieve.

The product was carefully tailored to users during the development process and takes their needs and abilities into account.

Our users have the people, skills, time and resources to deliver our outcomes as of now.

If they need additional support, we are ready to provide it.

AMBER/GREEN RATING

- Our target group understand how they need to use the product/service to achieve their goals.

- Our product/service takes the user's abilities into account to some degree, but could do more to increase their ability to use the product/service effectively.

- Our users have some but not all of the support they need to achieve their goals.

- Our team is willing to offer some additional training and support to our users, but is not fully prepared to do so.

EXAMPLE FEEDBACK

Our team meets frequently with our target group and existing users to discuss what the product should help them to achieve, and whether they have the tools they need to achieve those goals.

Our team designed the product offering with our target group in mind, but did not have a full understanding of their limitations.

Students using our product are not currently on track to meet their goals.

We are working with users to increase their ability through additional training and individualised support.

AMBER/RED RATING

- Our users sometimes understand what the product/service should help them to achieve and what they need to do to get there.

- Our team has a limited understanding of our user's skillset, and the support we give users to improve this is infrequent and irregular.

- Our users have some but not all of the support they need to achieve their goals.

- Our team has historically provided one-off training rather than long-term capacity-building work.

EXAMPLE FEEDBACK

Our team has received significant feedback that students are not always clear about how to use this English product, or where to find answers to questions and concerns.

Our product development team were not aware of users' limited technical knowledge/resources when we sold them this product, and have offered one-off training to teach them to use it.

Students who use the product are not currently on track to reach their goals.

Our team has not offered students support beyond technical training, which has been general and one-off.

RED RATING

- The target group and existing users are not aware of what the product/service should help them to achieve and what they need to do to get there.
- The product/service is ill-suited to the user and attempts to build users' skills are ineffective.
- Our users do not have the resources and skills to meet their goals.
- We do not know how to help our users meet their goals.

EXAMPLE FEEDBACK

Students who use the product do not know or understand the product's objectives, and have previously used it inappropriately or incorrectly.

The product does not suit users' abilities or style of learning, and they are not given the support they need to use it to achieve their goals.

Our team recognises that user skills, time and resources are not in place to deliver our outcomes.

We do not know which skills and resources require support, or how to provide that support.

YOUR RATING

4.3

STAKEHOLDER RELATIONSHIPS

THINGS TO CONSIDER

Have you identified who your key stakeholders are and do you understand their needs and concerns?

Do you regularly communicate with your stakeholders?

Is there a culture of partnership and collaboration between your organisation and your stakeholders?

GREEN RATING

- Our team has strong relationships with a variety of stakeholders.
- We meet with stakeholders frequently, and have formal and informal conversations.
- Conversations with stakeholders have led to a culture of trust and partnership over a sustained period of time.

EXAMPLE FEEDBACK

Prior to launching the product, our team held a stakeholder mapping exercise in which they identified all key stakeholders, including students, higher education administrators and employers. We discussed how we should communicate with each.

Our team holds regular formal meetings with all relevant stakeholders, and has frequent informal conversations as well.

These stakeholders trust our team, and we work in a collaborative way.

AMBER/GREEN RATING

- Our team has strong relationships with several different stakeholders.
- We speak to many stakeholders regularly, but some interactions are infrequent and overly formal.
- Informal and formal conversations have resulted in trusted relationships with some stakeholders.

EXAMPLE FEEDBACK

Our team held a stakeholder mapping exercise before launching the product, in which we identified several key stakeholders and discussed how we should communicate with each.

Our team holds regular formal meetings with our users, as well as frequent informal conversations.

In the future, we hope to improve partnership and collaboration with wider stakeholders.

AMBER/RED RATING

- Our team has strong relationships with some stakeholders, but uncertain or limited relationships with others.
- The team is in contact with stakeholders, but only to react to their demands.
- A culture of 'them and us' exists, hindering trust and collaboration.

EXAMPLE FEEDBACK

Our team got to know our target group well when the product launched, but rarely speaks to teachers, parents, policymakers, or other stakeholders.

Our team holds meetings with users when they have problems, but otherwise check-ins are infrequent.

In the future, we hope to improve collaboration with external stakeholders, and to eliminate the current 'them and us' mindset.

RED RATING

- Our team has an uncertain or difficult relationship with stakeholders.
- We have some scheduled meetings, but in general our contact with external stakeholders is infrequent and overly formal.
- Miscommunication occurs frequently and it is difficult to solve problems together.

EXAMPLE FEEDBACK

Our team is not aware of and does not communicate with many stakeholders, or understand their needs.

When we do communicate with stakeholders, meetings are rarely trusting or colloquial.

Although our team holds meetings with users when they request them, these meetings can be challenging and communication is difficult.

YOUR RATING

SUMMARY RATING FOR SECTION 4

OVERALL RATING

Learn more at http://efficacy.pearson.com

ALWAYS LEARNING

PEARSON