THE CLIP PROCESS MANUAL

We will ensure the confidentiality of data provided to EFMD and processed in the framework of CLIP accreditation system. In comparative benchmarking tools, your company’s data is only reported in aggregate, such that no individual company’s data is identifiable.

Learn more about our privacy policy at https://efmdglobal.org/privacy-policy/

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Phase 0: Enquiry

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

1: The Accreditation Process (annex 1) (annex 2)

A Corporate Learning Function that wishes to apply for CLIP accreditation must be a member of EFMD. Non-members have to apply for membership first.

Stage 1: Application to enter the CLIP Accreditation Process

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

- The filled-in Application Form (annex 1)
- A Datasheet providing summary information and statistical data about the Learning Function’s positioning within the company, internal organisation, available resources and portfolio of activities (annex 2)
- A brief SWOT analysis of the Learning Function’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 Function 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 Sub-Committee based on the following criteria:

- The Learning Function to be assessed is an identifiable, separate unit within the company, under the management of an appointed Learning or Talent Officer and with its own staff.
- The Learning Function has a clearly defined mandate to pursue objectives that are linked to the strategy of the company and its operational units.
- The Learning Function is positioned at corporate level within the company.
• The Learning Function is providing more than just highly specialised technical training. Its offer should include executive and management development and the support of strategic change and innovation management.
• The scope of the Learning Function’s activities must not be so small that the assessment only focuses on one or two programmes.
• The Learning Function is able to go through the process in English.

The Accreditation Sub-Committee will take its decision in light of the Eligibility Review report and the Datasheet together with the supporting documents submitted by the Learning Function.

The Eligibility Review

The Eligibility Review will take the form of a one-day on-site or online visit to the company carried out by a member of the EFMD CLIP team.

The objectives of the Eligibility Review

1. *Brief the Learning Function’s staff on the CLIP process*
   - Clarify the Learning Function’s objectives and motivations in going through the CLIP process
   - Explain the CLIP standards and assessment criteria
   - Explain in detail the subsequent stages of the CLIP process (Self-Assessment, the Self-Assessment Report, and the Peer Review)

2. *Clarify the scope of the subsequent assessment*
   - 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 Function and the target audiences covered.
   - Determine the boundaries of the Learning Function that is to be assessed

3. *Make a recommendation to the CLIP Accreditation Sub-Committee regarding Eligibility*
   - Identify any problems or quality issues as per the CLIP quality framework that may render the Learning Function ineligible for entry into the process or make ultimate accreditation unlikely
   - Make a recommendation to the CLIP Accreditation Sub-Committee with regard to the Eligibility of the Learning Function to enter the CLIP process
   - 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 Review 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 Function 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 many cases the Corporate Learning Function will not be responsible for all learning and development in the company. Technical training often times remains the responsibility of the business units. In large companies, there may be other providers in the divisions and regions with which the Corporate Learning Function will interface. In these cases, the CLIP assessment would only extend to the Learning Function’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 Function itself, especially when it is part of a larger 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 Review Report (annex 3)

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

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 Sub-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 or online 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 five
chapters in the CLIP Standards and 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 Function’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 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 more junior member of staff within the Learning Function.

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 Function’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 Function’s internal information systems. The process of gathering and structuring the input for the Self-Assessment report will be of great value in clarifying where the Learning Function 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 Function’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 Function 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 Function’s portfolio of activities in a structured, focused, and non-adversarial manner.
Stage 4: Drafting of the Self-Assessment Report

The report will provide a description of the Learning Function’s strategic positioning and operations along the five chapters of the CLIP quality framework. It should, however, by more than just a descriptive document and should include:

- A brief overview of the organisation’s business activities, financials, workforce, and geographic footprint
- A short history of the Learning Function
- A Strategic Self-Audit
- A SWOT analysis of the Learning Function’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 EFMD CLIP team is happy to provide guidance and feedback on a draft version of the report.

The main purpose of the report is to provide the Peer Reviewers with a complete understanding of the Learning Function and its role within the company. It should provide the reviewers with the essential information about the Learning Function before they begin the series of meetings and interviews during the on-site or online 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 Function.

Stage 5: The Peer Review (annex 4)

The Peer Review is a two-and-a-half day either on-site or online 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 team and the construction of the peer review schedule.
The Composition of the Peer Review team

A typical Peer Review team is composed of one member of the EFMD, mostly the CLIP Director, 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 Function’s staff and its stakeholders across the company. These will include

- Executive Committee members
- Heads of corporate functions and business units
- The CHRO
- HR Business Partners and the head of talent management (if not part of the CLO role)
- Participants in the Learning Function’s leadership and functional programmes
- The Learning Function’s leadership team and select members of staff
- Internal and external facilitators
- External partners such as consulting companies, universities or technology providers.

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

Even with on-site reviews, many of the interviews are conducted by telephone or video conference when face-to-face meetings are not feasible.

The Base Room

In case of an on-site review, 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 online 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 prior to the first day of meetings with a preliminary assessment based on its reading of the Self-Assessment report and the supporting documents.

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 Profile Sheet with his or her own individual
assessment. For each item, the reviewers choose Above Standard, Meets Standard or Area for Development (or, in rare cases, Not Applicable).

The reviewers then confront their opinions and agree on a single group assessment for each item. Within the context of the organisation and its strategic agenda, the team develops a list of the points of excellence, the strengths, and the areas for development of the Learning Function 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 Sub-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 Function but also to provide significant benchmarking and continuous development guidance to the company.

The Report will cover the following points:
- Detailed assessment against the CLIP Standards and 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 Sub-Committee concerning the award of the Quality Label.

The Peer Review team can recommend:
- Accreditation for five years
- Accreditation for three years in case of a lack of clarity about the long-term future of the Learning Function or of a very uneven profile sheet with distinct areas for development
- Deferral for a period of not more than one year in cases where clearly identified corrective measures can be taken to make accreditation possible
- Non accreditation.

Stage 6: Awarding of the CLIP Quality Label

Decision by the CLIP Accreditation Sub-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 Function broadly meets the CLIP standards
- Evidence that the Learning Function 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 Function fulfils all requirements for accreditation. However, it is expected 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.** The Learning Function fulfils all requirements for accreditation, but there remains either some lack of clarity about its long-term future or its assessment according to the CLIP Profile Sheet is rather uneven with distinct areas of development. In these cases, the Learning Function will be expected to demonstrate that it will successfully address the issues of concern identified by the Peer Review Report.

- **Deferral** for a period of not more than one year, during which the Learning Function 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 Sub-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 CASC, 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.
Follow-up after the Accreditation Decision: Five-year Accreditation (annex 6)

The Learning Function 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).

As evidence that the Learning Function is actively working towards its continuous development, it will present an Interim Report to the CLIP Steering Committee after two and a half years.

Expectations regarding these two presentations are detailed in the annex.

Follow-up after the Accreditation Decision: Three-year Accreditation (annex 6)

The Learning Function 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).

As evidence that the Learning Function is actively working towards its continuous development, it will present an Interim Report to the CLIP Steering Committee after one and a half years.

Expectations regarding these two presentations are detailed in the annex.

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 Function’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 Function no longer conforms to the CLIP standards, the company has one year in which to address the issues to the satisfaction of the Accreditation Sub-Committee. Failure to provide evidence that the Learning Function still merits the CLIP quality label will lead to discontinuance of the accreditation.

Nota Bene: The Learning Function 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 7)

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 five-year period following the date of the previous accreditation decision by the Accreditation Sub-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 Function or a situation of particular disruption in the company.

Re-accreditation requires the submission of a respective application form.

**The Self-Assessment Report**

In preparation for the Peer Review, the Learning Function 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, strategic mandate and governance of the Learning Function
   - Changes in the definition and coverage of its target markets
   - Changes in the Learning Function’s portfolio of offerings
   - Changes in the delivery model
   - Changes in the definition and assessment of impact

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
   - Summarise other significant quality improvement and development measures that have been taken

3. **The current situation**
   - Summarise the current situation of the Learning Function
   - Present a current SWOT analysis

4. **Key challenges for the future**
   - Explain the strategic agenda of the Learning Function for the coming years
   - Describe the development priorities for the future.
The Peer Review (annex 4)

A confirmation review by a two-person Peer Review team will be organised to validate the Self-Assessment update and to examine the Learning Function’s case for renewal of accreditation. The confirmation review 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 or online review. In cases where very substantial changes have occurred since the previous visit, a longer time may be necessary. And, of course, the Learning Function itself is free to request a longer visit in order to benefit from a more thoroughgoing Peer Review.

The Base Room

In case of an onsite review, 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 access to the employee learning portal. 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 review. 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 Function.

The Peer Review Report

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

The Re-Accreditation Decision

Examination by the CLIP Accreditation Sub-Committee of the Learning Function’s case for renewal of accreditation. The Sub-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 worked on their development plan to now qualify for five-year accreditation*
- Renewal of accreditation for a period of three years with specified areas for development
- Deferral for a period of one year
- Non-renewal.
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 online/onsite 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 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: …………………………………………………………………………………………………
Telephone: …………………………………………………………………………………………………………
VAT Identification Number (Please provide for invoicing purposes): ……………………………………………(see art. 5 of General Terms and Conditions on page 1)
Annex 2

CLIP Data Sheet
CLIP Data Sheet

Name of the Company:

Number of employees in the company:

Name of the Learning Function:

(i.e., Corporate University, Academy, Institute, HR L&D 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 Function (Chief Learning Officer, Director etc.)

Name:
Title:
Phone:
Email:

Contact Person if other than the Chief Learning Officer

Name:
Title:
Phone:
Email:
Section A
Positioning of the Learning Function

Describe the position of the Learning Function in the company structure

- Brief history of the Learning Function
- Principal Mission of the Learning Function
- Position in the company’s organisational structure
- Reporting line(s)
- Interface with HR processes
- Interface with decentral L&D teams 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 and Resources of the Learning Function

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

- Total Headcount of the Learning Function

- Managers within the Learning Function (Number of persons with managerial responsibility including their positions)

- Company Resources available for delivery of learning interventions
  - Internal trainers
  - Subject matter experts
  - Top and senior managers
  - Etc.

- External Suppliers
  - Main partners (academic institutions, consulting companies, technology providers etc.)

- Locations (learning staff offices) and Residential Facilities

- Digital Learning Infrastructure and Tools

- 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 Function’s programmes and activities within the company

1. Coverage of the company organisation
   - Corporate centre
   - Divisions
   - Business units
   - Geographical regions

(For instance, is the Learning Function 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 Function’s mandate:
   - Top and Senior management
   - Middle management
   - First line management
   - New hires
   - High potentials/ Talent pipeline
   - Functional staff (sales, HR, finance etc.)
   - Technical staff
   - Etc.

3. External Markets served:
   - Customers
   - Suppliers
   - Others

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

(For example: classroom and digital learning, micro-learning, action learning, programs with certificate, coaching, mentoring, change management and OD, workshops and conferences, knowledge management, social learning)
Section E
Key Learning Metrics in Use

- Number of participants enrolled in learning initiatives per year:

- Percentage of employees in learning initiatives per year (workforce penetration, by level and unit):

- Number of yearly formal learning hours/employee:

- Learning Spend as % of payroll:

- Learning Spend per employee:

- Learning Evaluation metrics in use (Kirkpatrick L1-4, NPS etc.):

- Other metrics in use:

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, WITH TARGET GROUP AND NUMBER OF PARTICIPANTS
- A SWOT ANALYSIS REFLECTING THE CURRENT SITUATION OF THE LEARNING FUNCTION WITH AN INDICATION OF THE MAIN DEVELOPMENT CHALLENGES
Annex 3

The Eligibility Review Report
CLIP Eligibility Review Report
Name of the Learning Function
Name of the reviewing CLIP expert
Date of the visit

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

2. Adequacy of the Datasheet and supporting material provided

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

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

5. Satisfaction of the Eligibility Criteria:
   5.1 Independent structure
   The Learning Function to be assessed is an identifiable, separate unit within the company, under the management of an appointed Learning or Talent Officer and with its own staff.

   5.2 Strategic mandate
   The Learning Function has a clearly defined mandate to pursue objectives that are linked to the strategy of the company and its operating units.

   5.3 Positioning
   The Learning Function is positioned at corporate level within the company.

   5.4 Content of the learning offer
   The Learning Function is providing more than just highly specialised technical training. Its offer should include executive and management development and the support of strategic change and innovation management.
5.5 Size and scope
The scope of the Learning Function’s activities must not be so small that the assessment only focuses on one or two programmes.

5.6 Competence in English
The Learning Function is able to go through the process in English.

6. Brief definition of the scope of the Learning Function’s programmes and services, including its responsibilities in orchestrating the overall L&D activities 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 Function may not meet the CLIP standards for accreditation

9. Recommendation for Eligibility
Annex 4

Logistics Guidelines for On-Site & online Reviews
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.

Please liaise directly with the EFMD coordinator to confirm all logistic arrangements for the members of the team.

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.

Hotel accommodation should ideally be arranged close to the site.

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).

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

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 (day 1).

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

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

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

Interviews should ideally take place on the same floor or in the 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.

The final Self-Assessment Report (SAR) and the first draft of the Interview Schedule should be sent to the review Team Leader (TL) at least two weeks prior to the visit. EFMD Coordinator should be copied.
General timing of the visit for accreditation review

Day 0  around 18:00  Arrival of Peer Review Team
       19:00 – 22:00  Peer Review Team meeting & dinner in hotel

Day 1  09:00 – 18:00  Interviews at the reviewed institution + lunch
       18:00 – 23:00  Peer Review Team meeting & dinner in hotel or Social Dinner

Day 2  09:00 - 18:00  Interviews + lunch
       18:00 – 23:00  Peer Review Team meeting & dinner at hotel

Day 3  09:00 – 11:00  Interviews (if needed)
       11:00 – 13:00  Debriefing and Feedback to the reviewed institution
       13:00 – 14:00  Optional Lunch
       14:00  Leave

General timing of the visit for re-accreditation review

Day 0  around 18:00  Arrival of Peer Review Team
       19:00 – 22:00  Peer Review Team meeting & dinner in hotel

Day 1  09:00 – 18:00  Interviews at the reviewed institution + lunch
       18:00 – 23:00  Peer Review Team meeting & dinner in hotel or Social Dinner

Day 2  09:00 – 12:00  Interviews (if needed)
       12:00 – 14:30  Peer Review team finalise report + lunch
       14:30 – 15:30  Debriefing and Feedback to the reviewed institution
       16:00  Leave

CLIP online Peer Review Logistics Guidelines for the Reviewed Institution

Platform
The Institution can choose the platform to host the OPR.
Each participant should have access to an individual computer and internet connection to join the sessions - this should be ensured by the Institution.

The institution will provide a participant directory (with photos) per session to minimise time spent on introductions by institution participants

Meeting Host and Co-Host
The institution should assign one person to be the host and one or more to be Co-host.
- host: manage the participants (waiting room) and the Breakout Rooms. They should ensure that the correct participants are connected at the appropriate times.
- Co-host: manage the participants (waiting room), but not the Breakout Rooms.

If the host disconnects due to an unstable internet connection, a Co-Host will automatically become the Host and the call can continue uninterrupted.
**Link for the OPR**

We advise one link (if possible) for all of your meetings and sessions rather than multiple links for each session. This will make it easier for the Peer Review Team members to participate.

**Waiting Room**

This feature will allow the Host to manage who enters the Meeting Room and when.

**Breakout Rooms**

Sessions take place in a separate Breakout Room, which are easily created by the Host. After a participant has entered the Main Meeting Room, the Host can place them in the Breakout Room with the PRT. The Host would remain outside of the session, in the Main Meeting Room.

At several times during the review, the PRT will need to have private deliberations without anyone from the Institution be present. If the PRT is not scheduling their own video calls, the PRT should be placed in a private Breakout Room.

**In case Zoom is used as video technology: Technical zoom set-up**

1. General Zoom Settings
   - Join before host: Off or On
   - Chat (allow meeting participants to send a message visible to all): On
   - Sound notification when someone joins or leaves: On
     - Play sound for: Everyone
   - Co-host - Allow the host to add co-hosts: On
   - Show Zoom windows during screen share: On
   - Nonverbal feedback: On
   - Allow removed participants to re-join: On
   - Allow participants to rename themselves: On
   - Hide participant profile pictures in a meeting: On
   - Breakout room: On
     - Allow host to assign participants to breakout rooms when scheduling (only available with most recent Zoom version): Checked
   - Virtual background: On
   - Waiting Room: On
     - Customize the title, logo, and description
     - Welcome message: "Welcome to the CLIP online review"
     - Logo: add high resolution school logo
     - Waiting room description sample: “You are now in the waiting room. The Host will admit you to the main room in due time.”

2. Single zoom link:
   - Topic: (will be displayed in waiting room)
     - Ex. CLIP online Peer Review – Institution Name - date
   - When: Select start date and time
   - Recurring Meeting: Checked
   - Recurrence: Daily
   - Repeat every: 1 day
   - End date: By "select end date"
   - Registration: Not checked
   - Meeting Password: Not required
Alternative Hosts: Add your co-host email here

Meeting Options:
- Enable join before host: Checked
- Enable waiting room: Checked

3. Breakout Room Options:
- Move all participants into breakout room automatically: Not checked
- Allow participants to return to main session at any time: Checked
- Breakout rooms close automatically after X minutes: Not checked

General timing of the OPR for accreditation

Day 1 & 2 4 x 90 minutes blocks with 30 minutes break in between on day 1 and day 2 (with some deviation)*.

Day 3 1 x 90 minutes, then break (+/-1h-2h), then feedback session (30min). (with some deviation)*

General timing of the OPR for re-accreditation

Day 1 4 x 90 minutes blocks with 30 minutes break in between (with some deviation)*.

Day 2 2 x 90 minutes, then break (+/-1h-2h), then feedback session (30 min). (with some deviation)*

* depends on time zone difference between organisation under review and the PRT and will need each time a customized solution.
Annex 5

The online and onsite 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 Learning Function is positioned in HR)
  - The Executive the Learning Function reports into, if other than the CHRO

- Major stakeholders in the business who are the Learning Function’s clients and who may have been participants in its executive development programmes
  - Heads of the different divisions and business units in the company
  - Heads of major corporate functions (Finance, Sales & Marketing, etc.)
  - Members of the Learning Function’s governing body or Advisory Board

- HR managers from the business units with whom the Learning Function interfaces e.g., in the learning needs analysis and in the management of the participant selection/nomination process
  - HR Directors/ Business Partners from the business units

- Heads of decentral L&D functions in the business units or regions

- Heads of other corporate HR Departments such as
  - Talent Management or HR Development
  - Executive Development
  - Employee Engagement/ Culture/ D&I

- Members of the Corporate Learning Function’s Staff such as
  - Learning Partners/ Heads of Academy
  - Learning Experience Designers
  - Learning Technology Lead
  - Learning Analytics Lead
  - Learning Operations Lead

- Programme facilitators
  - Internal trainers and subject matter experts
  - Internal or external coaches
  - External trainers (from outside the company)

- Learning ecosystem partners/ suppliers such as consulting and training companies, Business Schools, learning technology providers

- Participants from selected 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 to schedule one or two meetings between 9h00 and 11h00 on the last morning.

- The first meeting with the Learning Function’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 Learning Function 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 Learning Function’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 interview partners (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 experience design, digital learning, participant management, etc.

*In case of an on-site review*

- Even in on-site reviews, it is usually necessary to schedule many of the interviews by telephone or video conference as not all interview partners might be co-located.

- Interviews are normally scheduled for 45 minutes. The minimum should be 30 minutes.

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

- The meetings for each day should begin at 8:30 or 9:00 and end no later than 18:00.

- 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.

*In case of an online review*

- In an online review, the members of the Peer Review team (PRT) might not be in the same time zone, and in addition not even close to the time zone of the company’s head office. This requires some deviation from the a.m. standard schedule for on-site reviews, either to start earlier or later in the day or to limit the overall time available for interviews. Hence, an online review requires some flexibility from all sides.

- The PRT must cater for its own lunches and dinners and hence, requires some extended breaks.

- Time blocks of 90 minutes for interviews, followed by a 30-minute break after the first and a 60-minute break after the second block (and so on) have proven to be efficient.

- The company must provide access to a videoconferencing system (e.g., Zoom or Teams). It should also appoint a facilitator or concierge of the online review, who ensures that interview partners are welcomed and transferred to the interview breakout room and that time discipline is maintained.
Annex 6

Guideline for presentations at CLIP Steering Committee meetings
Guideline for presentations at CLIP Steering Committee meetings

CLIP accredited Learning Functions (LF) are requested twice during their accreditation period of either three or five years to present to the CLIP Steering Committee:

1. At the meeting following the (re-)accreditation decision, the LF should share their experience in going through the (re-)accreditation process
2. Half-way through the accreditation period, the LF should provide an interim report, focusing on progress made in actively working towards the realization of its continuous development plan, based largely on the recommendations made in the peer review report.

To secure interesting SC meetings, presentations should not only be informative but also trigger a rich debate among SC members about innovation, best and next practices in learning and talent development, in the spirit of sharing and mutual learning.

Therefore, both presentations should comprise only a brief overview of the company (market position, geographic footprint, strategy, workforce structure, major talent challenges etc.) and the learning function.

In case of presentation 1, the following topics should be raised:
- brief overview of institutional context and LO
- experience of going through CLIP, its impact and findings, incl. ideas for improvement
- what the LO can contribute to the CLIP community in terms of experience and excellence
- what the LO would like to learn from the CLIP community
- recent or intended future innovations in learning and development, incl. things that did not work as expected or hoped

In case of presentation 2, the following topics should be included:
- brief overview of institutional context and LO
- changes in company profile and the LO since (re-)accreditation, if any
- focus areas of the LO’s development plan, largely building on the recommendations made in the peer review report
- recent or intended future innovations in learning and development, incl. things that did not work as expected or hoped
- what the LO would like to discuss with and learn from the CLIP community

Both presentations should be followed by Q&A and lead to a lively discussion. Presentation and discussion should not exceed 30 minutes in total.
Annex 7

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 €16,000 or €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 16,000€ (3-year accreditation); 20,000€ (5-year accreditation)

Application Fee: 10,000€ invoiced upon receipt of Application form.

Accreditation Fee:
- If re-accreditation for 5 years: 10,000 €
- If re-accreditation for 3 years: 6,000 €
- If no accreditation: 0 €

The accredited organisation has 2 options regarding the final payment: (please select)

r The above amount can be paid in one installment from the date on which the CLIP Accreditation Sub-Committee (CASC) conferred the CLIP label.

r The above amount can be paid in annual installments of 2,000€ from the date on which the CASC conferred the CLIP label.

3. The reviewed institution will be charged directly by the reviewers for their travel, accommodation and other direct expenses for the onsite eligibility 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 end of month 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 2,000€ 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.