Sage

Program Development Policy and Procedures

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Program Development Policy and Procedure
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Program Development Policy and Procedure

1.1 Change Control

Version	Author of Change	Date	Details of Change
2019.01	Gerhard van der Berg	July 2019	Policy updated & amended to suit new organisation structure of Sage.

1.2 Record of Approvals

Level*	Committee Name	Date
1	Ravin Rughoonandan (Content Design Manager)	July 2019
2	Pragasen Moodley (Director, Learning Services AME)	July 2019
3	Candice Govender (Legal Director, AME)	July 2019
4	Pieter Bench (Executive Vice President, AME)	July 2019

* Level of approval

Program Development Policy and Procedure

2.1 Scope

The scope of this document is to establish a standard on the approval process for new program material and the update and/or changes to be made on existing program material:
- Creating new program material,
- Updating program material,
- Creating new e-learning material,
- Updating e-learning material,
- Creating a new assessment,
- Updating assessments,
- Quality control and approval process.

2.2 Philosophy

Sage's philosophy is to recognise performance and encourage life-long learning. Therefore, Sage's policies and procedures are outlined in accordance.

2.3 Policy Statement

Training material is a very important aspect of the learning process, therefore, at Sage, we will conduct, assess and moderate training material according to the principles.
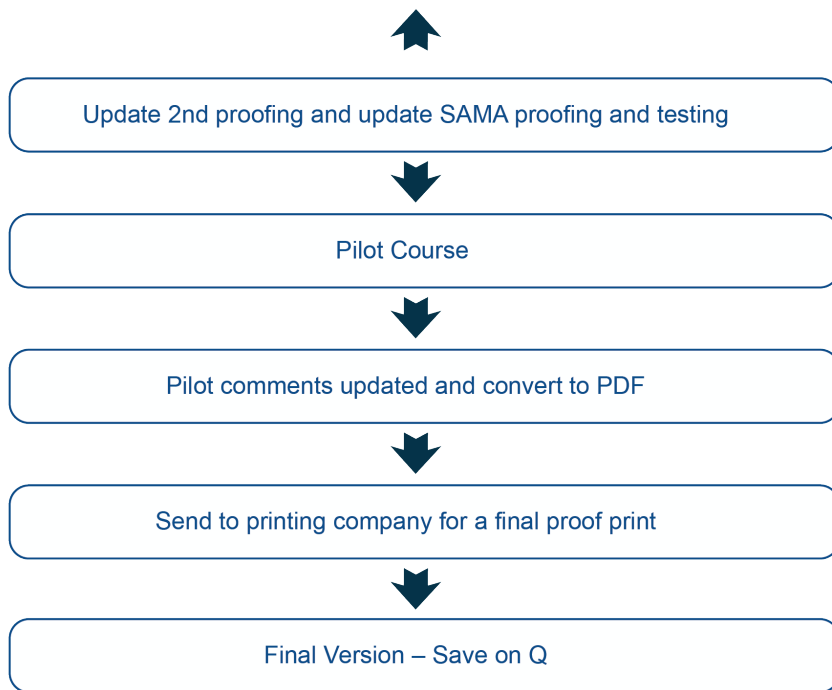
Sage develops and conducts the following types of training material as part of their Learning Methodology:
- Instructor led training material (ILT), which will be used during the courses in classroom.
- Anytime learning material (ATL), which will be used by learners in the comfort of their business or home at their own pace.
- E-Books, which will be used by learners in the comfort of their business or home at their own pace.

2.3.1 Instructor led training material (new and existing)

The process of creating new training material is explained in the flow chart on the next page.
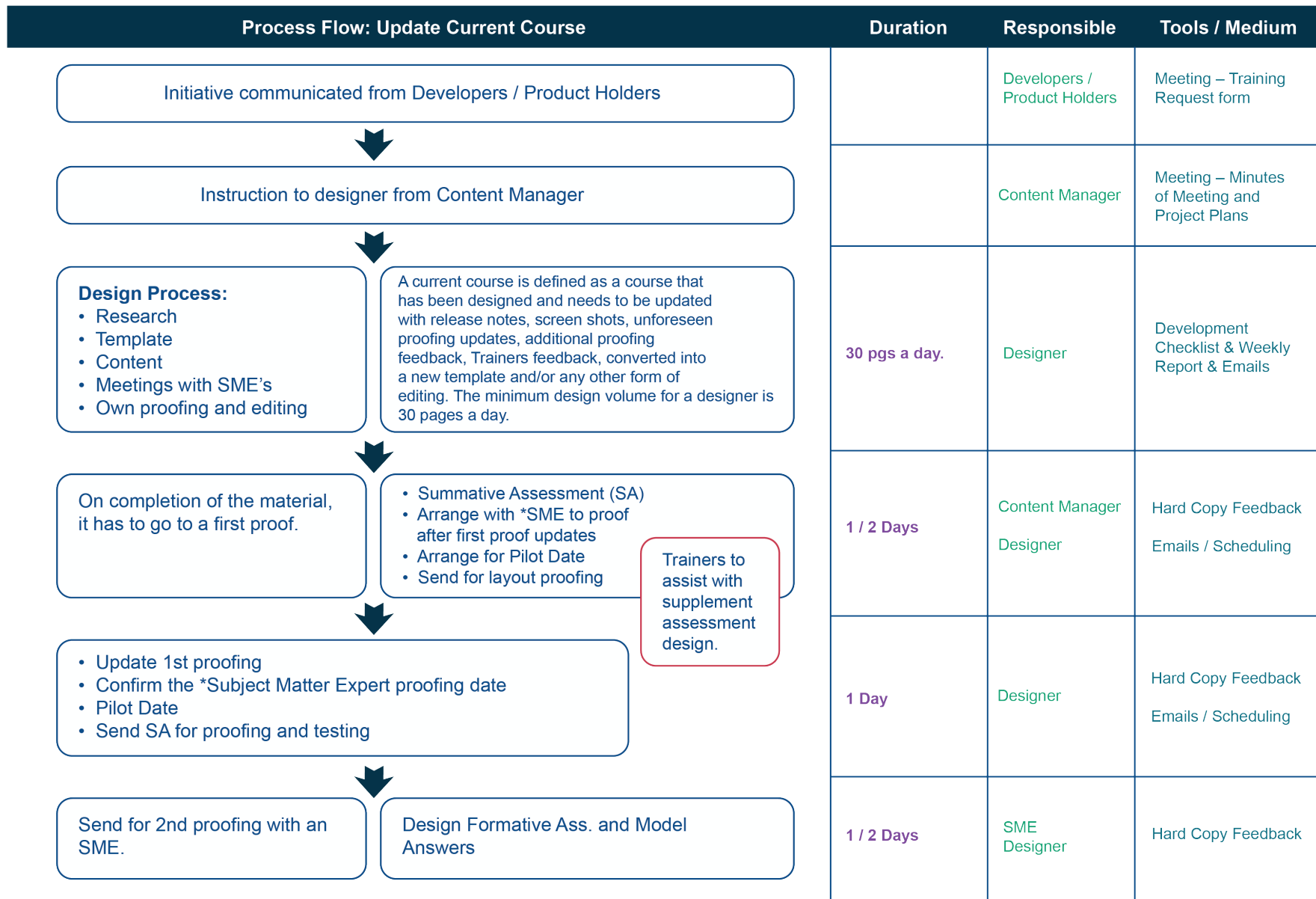
Process Flow: New Course	Other Role	Duration	Responsible	Tools / Medium
Initiative communicated from Developers / Product Holders			Developers / Product Holders	Meeting – Training Request form
Instruction to designer from Content Manager			Content Manager	Meeting – Minutes of Meeting and Project Plans
Design Process: • Research • Template • Content • Meetings with SME's • Own proofing and editing A new course is defined as a course that has no previous course material. The minimum design volume for a designer is 15 pages a day.	Developers to provide information or systems for development	15 pgs a day.	Designer	Development Checklist & Weekly Report & Emails
On completion of the material, it has to go to a first proof. • Summative Assessment (SA) • Arrange with *SME to proof after first proof updates • Arrange for Pilot Date	A Pilot trainer is for the Pilot training.	1 / 2 Days	Content Manager Designer	Hard Copy Feedback Emails / Scheduling
• Update 1st proofing • Confirm the *Subject Matter Expert proofing date • Pilot Date • Send SA for proofing and testing	Facilitators to assist with supplement Assessment design	1 Day	Designer	Hard Copy Feedback Emails / Scheduling
Send for 2nd proofing with an SME. Design Formative Ass. and Model Answers		1 / 2 Days	SME Designer	Hard Copy Feedback

Flowchart

Update 2nd proofing and update SAMA proofing and testing

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Pilot Course

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Pilot comments updated and convert to PDF

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Send to printing company for a final proof print

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Final Version – Save on Q

Table

Other Role	Duration	Responsible	Tools / Medium
	1 Day	Designer	Hard copy feedback
Training is responsible for Evaluation forms	Course Outline Days	Pilot Facilitator(s)	Evaluation Forms
	1 Day	Designer	Save on Q: Training Material
Designer responsible for paper trail for Receipt of Deliveries.	2 - 5 Days	Designer / Printers	Receipt of Delivery Save on Q: Training Material

If a course requires "show me's" or "Captivate Demonstrations" it was communicated that it will form part of your Additional Tasks.
It is recommended to do 1 "show me" per day (estimate time for 1 x 'show me' is 2 hours).

The process of updating training material is explained in the flow chart on the next page.

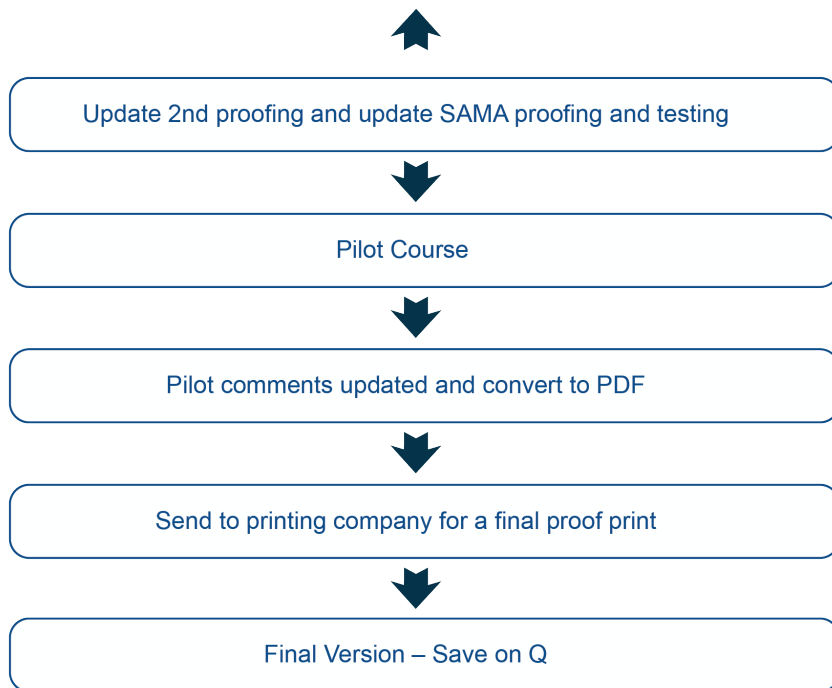| Process Flow: Update Current Course	Duration	Responsible	Tools / Medium
Initiative communicated from Developers / Product Holders		Developers / Product Holders	Meeting – Training Request form
Instruction to designer from Content Manager		Content Manager	Meeting – Minutes of Meeting and Project Plans
Design Process: • Research • Template • Content • Meetings with SME's • Own proofing and editing A current course is defined as a course that has been designed and needs to be updated with release notes, screen shots, unforeseen proofing updates, additional proofing feedback, Trainers feedback, converted into a new template and/or any other form of editing. The minimum design volume for a designer is 30 pages a day.	30 pgs a day.	Designer	Development Checklist & Weekly Report & Emails
On completion of the material, it has to go to a first proof. • Summative Assessment (SA) • Arrange with *SME to proof after first proof updates • Arrange for Pilot Date • Send for layout proofing Trainers to assist with supplement assessment design.	1 / 2 Days	Content Manager Designer	Hard Copy Feedback Emails / Scheduling
• Update 1st proofing • Confirm the *Subject Matter Expert proofing date • Pilot Date • Send SA for proofing and testing	1 Day	Designer	Hard Copy Feedback Emails / Scheduling
Send for 2nd proofing with an SME. Design Formative Ass. and Model Answers	1 / 2 Days	SME Designer	Hard Copy Feedback

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Update 2nd proofing and update SAMA proofing and testing

⬇

Pilot Course

⬇

Pilot comments updated and convert to PDF

⬇

Send to printing company for a final proof print

⬇

Final Version – Save on Q

Duration	Responsible	Tools / Medium
1 Day	Designer	Hard copy feedback
Course Outline Days	Pilot Facilitator(s)	Evaluation Forms
1 Day	Designer	Save on Q: Training Material
2 - 5 Days	Designer / Printers	Receipt of Delivery Save on Q: Training Material

If a course requires "show me's" or "Captivate Demonstrations" it was communicated that it will form part of your Additional Tasks.
It is recommended to do 1 "show me" per day (estimate time for 1 x 'show me' is 2 hours).

2.3.2 New anytime learning training material

The process of creating new anytime learning (e-learning) training material is explained in the following table:

Step	Description	Duration	Person Responsible
1	E-learning course requested from developers, customers or staff members.	N/A	Staff / Customers
2	Instruction to designer from Content Manager.	N/A	Content Manager
3	Design Process: • Research • Template • Content building • Own proofing and editing	15 days per half day course	Designer
4	On completion of the e-learning, it must go to a first proof.	1 Day	Quality Control
5	Update feedback received from quality control.	1 Day	Designer
6	Arrange for pilot students.	1 Day	Designer
7	Update feedback from pilot students.	1 Day	Designer
8	Creation of summative assessment	1 / 2 Days	Designer
9	Summative assessment must go to quality control.	1 Day	Quality Control
10	Update feedback received from quality control.	1 Day	Designer
11	Publish final draft for uploading to LMS.	1 Day	Designer
12	Test course on LMS for final approval	1 Day	Designer
13	Approval process	1 Day	Content Manager

2.3.3 Update existing anytime learning training material

The process of updating an existing anytime learning (e-learning) training material is explained in the following table:

Step	Description	Duration	Person Responsible
1	Update e-learning course requested from developers, customers or staff members.	N/A	Staff / Customers
2	Instruction to designer from Content Manager.	N/A	Content Manager
3	Design Process: • Research • Template • Content Update • Own proofing and editing	2 days per half day course (content dependent)	Designer
4	On completion of the e-learning, it must go to a first proof. Only changes required QC.	1 Day	Quality Control
5	Update feedback received from quality control.	1 Day	Designer
6	Update of summative assessment (if any)	1 Day	Designer
7	Summative assessment must go to quality control (if updated).	1 Day	Quality Control
8	Update feedback received from quality control.	1 Day	Designer
9	Publish final draft for uploading to LMS.	1 Day	Designer
10	Test course on LMS for final approval	1 Day	Designer
11	Approval process	1 Day	Content Manager

2.3.4 Creating new assessment

Sage's material policy states that every training program must be accompanied by a summative assessment. The following procedure must be followed when creating a new summative assessment:

Step	Description	Duration	Person Responsible
1	Design Process: • Create a draft question bank with questions and answers.	2 / 3 Days	Designer
2	Create question bank on the LMS systems (Training Zone or Sage University)	1 Day	Designer
3	On completion of the summative assessment, it must go to a first proof.	1 Day	Quality Control
4	Update feedback received from quality control.	1 Day	Designer
5	Publish final draft on LMS.	1 Day	Designer
6	Test assessment on LMS for final approval	1 Day	Designer
7	Approval process	1 Day	Content Manager

2.3.5 Updating assessment

The following procedure must be followed when updating summative assessments:

Step	Description	Duration	Person Responsible
1	Update question bank with changed questions or added questions.	1 Day	Designer
2	On completion of the summative assessment update, it must go to a first proof (changes or updates only).	1 Day	Quality Control
3	Update feedback received from quality control.	1 Day	Designer
4	Publish final draft on LMS.	1 Day	Designer
5	Test assessment on LMS for final approval	1 Day	Designer
6	Approval process	1 Day	Content Manager

2.3.6 Quality Control and Approval process

All training material courses, e-learning, summative assessments related to a training program must go through a quality control process to make sure that the content is accurate and true. The approval process is included in the quality control process.

The following procedure must be followed with the quality control and approval process:

Step	Description	Duration	Person Responsible
1	Designer send training material, e-learning, summative assessment content to quality controller.	1 Day	Designer
2	Quality controller goes through content to make sure that content is accurate and true. The Quality Controller will fill out the Quality Control Feedback Form.	1 / 3 Days	Quality Control
3	Designer to update all feedback received from Quality Controller and fill complete the same Quality Control Feedback form.	1 / 2 Days	Designer
4	Designer to submit all changes back to Quality Controller for last checks if changes are implemented. Quality controller will sign off the Quality Control Feedback Form.	1 Day	Quality Control
5	Only e-learning projects must be signed off additionally by the E-Learning Project Lead on the Quality Control Feedback Form.	1 Day	E-Learning Project Lead
6	Final Quality Control Feedback Form must be submitted to the Content Manager for verification.	1 Day	Designer
7	Content Manager signs off the Quality Control Feedback Form and gives approval for project to go live.	1 Day	Content Manager

2.4 Appendix A – Sage Training Request Form

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Training Request Form

Particulars of the Person / Department requesting the Training Material:				
Date Training Material Requested:				
Date Training Material to be completed:				
Target Market for the Training Material:				
Pre-Requisites for the Training Material:				
Purpose of the Training Material:				
The methodologies that the Training Material must accommodate:	*Facilitated Workshop*		*E-learning*	
Deliverables of the Material: ***(Note that the deliverables selected will extend the design process)***	*Student Manual*		*Facilitators Guide*	
	Paper Based Training Aids / Visual Aids		*Demonstrations*	
	Seminar Slideshow		*Power Point Slideshow*	
Approval:	*Name:*			
	Date of Approval:			
Other Conditions:				

Particulars of the Training Team:	
Date of Training Material Request:	
Negotiated Design Time: (per deliverable):	
Designer assigned to the project:	
Content Manager Approval:	
Other Negotiations:	

2.5 Appendix B – Sage Quality Control Feedback Form

ILT quality control sheet				
Project name		Project due date		
Learning designer		Design date		
Quality controller		Date needed back from QC		

Criteria:	QC Comments/Feedback	Rating
• Template rules applied		
o Preface/Introduction/T.O.C. etc.		
o Lesson main / Lead pages		
o Headings		
o Use of icons		
o Fonts and font sizing		
o Headers/Footers/Page numbering		
o Tables		
• Grammar and spelling		
• Consistency and attention to detail		
• Lesson flow		
• Content accuracy		
• Activities tested		

Designer original date checked	Date needed back from QC	Date received from designer for QC	Date received from QC for updates	Date to QC after updates	Date received from QC after final updates & qc

Additional information/comments	

Designer sign off	QC sign off	Manager sign off	Document version	Final publish date	Final score for Designer	Final score for QC

2.6 Quality Control Scoring Methodology

Scoring methodology for QC to Instructional Designer for document proofing:

Criteria	Score
The document was not up to the required standard at all. This is the kind of score you can expect if QC sent the document back before going through it entirely. Consistency and attention to detail not up to standard and layout/formatting not according to templates.	1
The document requires some improvement, and/or QC had to point out errors repeatedly and/or corrections were not implemented as indicated and no valid reason specified. Some issues with formatting and layout.	2
The document is up to the expected standard, good attention to detail and consistency. All corrections were implemented after the first round of QC.	3
The document was above standard, excellent job and only minimal changes were required. Very good attention to detail and consistency.	4
The standard is exceeded by far. Very little or no changes were required, the contents and layout is perfect. Perfect consistency and excellent attention to the finest detail.	5

Scoring Methodology for Instructional Designer to QC for feedback received:

Criteria	Score
Little or no feedback was provided, where feedback was provided the instructions were not clear, many mistakes went through QC without them being identified. Feedback was not constructive and positive. QC did not deliver the feedback on time according to the agreed timelines.	1
Feedback was provided but not always clear. Feedback was provided after the agreed timeline.	2
Feedback was sufficient and constructive. QC delivered feedback on the agreed timeline.	3
Feedback was very detailed, and I was able to learn a lot from the mistakes made. The QC feedback resulted in a big improvement to the quality of the document. Feedback was delivered before the agreed timelines.	4
QC played an extraordinary role in ensuring that the document improved significantly. Feedback provided was constructive and positive, and made me better at my job.	5

*The scoring methodology may change after the publish of this policy.

3. Contacts

Should you have any questions about the content of this policy please contact the training department via email: Training.Za@sage.com.