European Student Card Extension and Adoption (ESC-tension)

IO2 Common Methodology

Erasmus+ 2020 Call Round 1

KA203 - Cooperation for innovation and the exchange of good practices

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Introduction

This document will develop the common methodology to be used in the development of the Matrix and Profiling Tool, which will be better defined in IO2-A2 and IO2-A3 and subsequently developed in IO3 and IO4 respectively.

The Matrix is multidimensional and intersects the 4 dimensions of the ESC on 2 "axes" which are Cards and Services, each of which then includes organizational / administrative and technical / technological aspects.

The Profiling Tool is the tool that allows HEIs to ask questions and find answers, corroborated by examples, on how to implement the ESC.

The Profiling Tool is the self-assessment tool to better understand the potential of the ESC and gain awareness of the necessary requirements for its adoption.

The Matrix and the Profiling Tool will have to express the point of view of the card implementer and student service provider, without also losing the perspective of users, legal entities, associations or institutions.

IO2 must always take into consideration all aspects related to the Matrix and Profiling Tool with an approach that goes from the general to the particular, therefore starting from the context of the country, then going on to investigate in particular the HEIs, University Charters and Services provided.

A. *Operational and application scope of the Matrix and Profiling Tool*

The operational and application areas of the Matrix will be as follows:

Card

organizational / administrative (e.g. presence of a national body that manages the cards, management of the life cycle of the card, management and protection of the relevant data, relations with CNOUS and supervisor)

technical / technological (e.g. paper format and layout, technologies used)

Services

organizational / administrative (e.g. type and agreements with service providers, authorizations from students and providers required to use the ESC as a recognition and authorization tool for the provision of services, scope of each service (i.e. local/national, availability/limitations for mobility students)

technical / technological (e.g. service management systems and card / central register, and analysis of all payment methods for services that may be applicable to the ESC)

The operational and application areas of the Profiling Tool will be as follows:

- Questionnaire that measures the quantitative aspects of the HEI (e.g. number of students)
- Qualitative questionnaire that measures type of services (e.g. catering, library)
- National specificities, such as regulatory aspects, administrative and legal requirements
- Current depth of integration with the ESC

B. *Sources of data, information and inputs for the development of the Matrix and Tool*

An evaluation plan will be developed to include a clear description of what sources of data, information and inputs that will be collected for the development of the Matrix and Tool. This will include from what sources and how, by whom, and when, as well as how the data will be analysed. This data will be incorporated into the matrix to ensure there is a viable plan for collecting all the data necessary for the intended purpose, which is the adoption of the ESC.

The data sources are the entities from which data will be collected. The typical data sources will be done on a country specific basis and will include the relevant National agencies, HEIs, European Commission, Other.

The process of data collection is an important aspect of this project. The data collection methods are the means by which the relevant data will be collected and used to understand and evaluate the "as-is" situation in the process of the ESC adoption. Each partner will be tasked with collecting the necessary information within their own country. It is also important to agree the timelines for the data collection to ensure the information is available when needed for reporting purposes and decision making. In addition, the data collection schedule is conducive to other factors taking place in the project's context.

The profiling tool will provide the analysis of the quantitative and qualitative data and how it will be summarised into meaningful, usable information.

C. *Depth and breadth of Matrix and Tool*

The Multidimensional Matrix and the Profiling Tool will incorporate HEIs and Student Service Providers' information on key areas relating to campus card operations. From the legal aspects to the card technology, looking also at the management of cards and services available on campuses. The Matrix and Tool combination will provide a 360º

detailed overview to each of the HEIs adoption of the ESC, and to the Student Service Providers (meaning both the Universities themselves and the external service providers) that are considering harmonizing their services with the required standards.

The Matrix and Profiling Tool will also assist HEIs and Student Service Providers with some high level ESC integration. Regarding HEIs that have already completed the ESC integration, the Matrix can be used to identify the HEIs level of compliance with the ESC and obtain the maximum benefit of the system integration.

D. *Shared Methods and Timing*

The common methodology was created by ECCA and ENDISU by the end of January 2021. It has been shared with all the project partners at that stage and each partner has been required to review the methodology and provide their comments and observations by mid-February 2021.

This provides a design process to establish a procedure for carrying out a schedule of assessments to understand all the relevant requirements that need to be considered and evaluated by HEIs in order to facilitate the adoption of the ESC standards.

E. *Document / tool templates to provide input and ideas for Matrix and Tool*

The Multidimensional Matrix establishes the guidelines for HEIs and Student Service Providers, as it defines the dimensions to be considered for the successful operation of the ESC. As soon as the Matrix is defined, it will be available for consultation, but it will also be helpful for stakeholders in understanding their current state on the four dimensions, checking highlighted points that they are already accomplishing, and gaps that need to be worked on to comply with the ESC standards.

On the other hand, the Profiling Tool not only provides questions and answers to HEIs and Student Service Providers, but also gives valuable data about their current level of preparation and awareness of the ESC, as well as the level of integration, if applicable. Their inputs/answers can be valued with the help of Quantitative and Qualitative Frameworks, so they can fit into the Matrix. This way, the Matrix can automatically highlight the points that are already harmonized with the ESC standards, and the ones that can be easier to harmonize, as well as the gaps, showing each HEI/student service provider the work already completed, and the further potential. This way, the Multidimensional Matrix and the Profiling Tool can work together with a common purpose, which is to help on the adoption and implementation of the

ESC. Stakeholders such as the ESC Project Representatives and Service Providers will then better understand how HEIs are dealing with the ESC process, and the barriers that they may find during its implementation. All this data will contribute to the provision of updates (and/or new features) of the ESC ecosystem, thereby ensuring that its adoption across Europe is a streamlined process.