IT-BSE (International Transfer: Building Service Engineering)

WP8 – External evaluation

Aims, actors, criteria, methodologies and tools, phases, deliverables

Proposal of mandate, prepared by Furio Bednarz

Aims of Work Package 8 and objectives of the mandate

Work Package 8 of IT-BSE project aims at ensuring the overall Quality of project management processes and deliverables. As stated in the application, quality assurance *is inherent in the organisation, the structure and the action plan of the project*. Project progresses will be monitored by the coordinator and they will be self-assessed through structured documents and forms for collecting information eventually enabling adjustments during the project lifespan. An external evaluation is expected to ensure *full accountability of the project achievements and difficulties*. The application clearly define the role of the <u>external evaluator</u> in undertaking initial, ongoing (formative) and final evaluation of project results, giving hints and suggestions for the valorisation and exploitation of deliverables. Two subcontractors are foreseen to complete WP8 tasks: *for the overall quality assurance the external evaluator Furio Bednarz will be responsible and for the quality of the matrix to be set up Prof. Dr. Mathias Becker will guarantee.* This proposal refers to the first mandate, but it is conceived for ensuring the best coordination between overall evaluation, and the specific evaluation of the Matrix.

The application clarify expected deliverables of the external evaluation, as well as methods and tools to be used for collecting and elaborating feed-backs and information given by the partners. *A formative evaluation report will be delivered at each sub-group meeting with a concise written report at six monthly intervals. The formative evaluation will include three distinct areas:*

1) an initial context evaluation to confirm the original specification in terms of needs and direction,

2) a process evaluation throughout the running of the WPs, involving internal reports,

3) a final evaluation of the process input and outcomes in terms of meeting the original aims and assumptions of the project.

External evaluator conclusions – after discussion and validation by the partners – are expected to be integrated within interim and final LLP NA reports.

Our proposal, aiming at defining a comprehensive external evaluation plan of IT-BSE, takes in account:

- Statements and clarifications included in the application (aims and expected outcomes of the WP8, as defined by the original submission form, and discussed with the project coordinator; roles of different actors in the framework of WP8);

- Previous similar experiences already achieved by the external evaluator in other projects coordinated (or participated) by the coordinator (EU Geschäftstelle - Bezirksregierung Köln)

- Last but not least aims, operational objectives and expected outcomes of the new project, as defined in the application.

Considering the above mentioned key points, and the tasks assigned to the external evaluator, the evaluation will take in account the 3 fundamental pillars defined by the scheme:
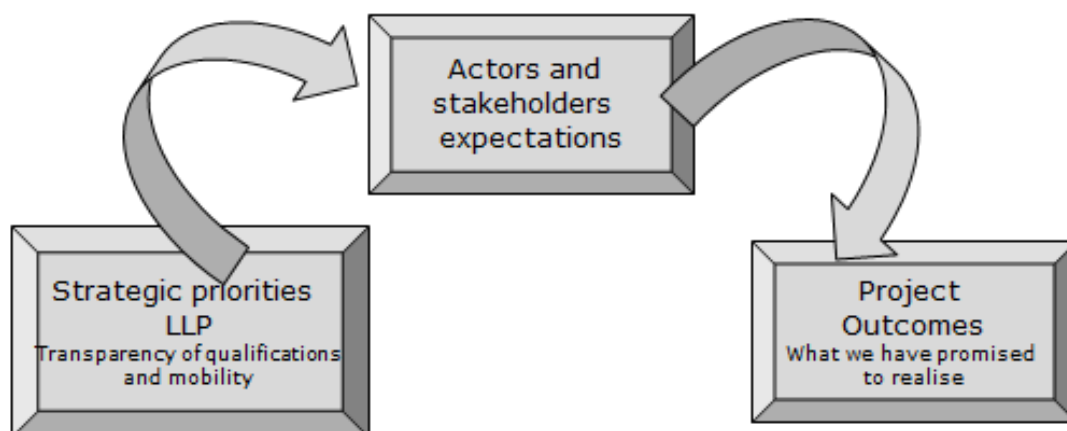
The following issues will be focused on:

- monitoring and analysis of the Project management, to verify the respect of the timetable, as well as the levels of commitment, cooperation and participation (during the meetings and in the development of work packages), in order to foster adaptations and continuous improvement of the process;

- general coherence and pertinence of project progresses and outcomes [1] with respect to the objectives defined in the application (respect of deliverables, perceived quality by the partners and stakeholders of the sector…)

- usefulness and sustainability of final results of the project, after the testing phase, considering opinions of the partners, as well as reactions by external stakeholders and relevant actors.

Actors

External evaluation will adopt strategies and tools referred to a participative multi-stakeholder approach. Therefore we will consider opinions and feed-backs of all the actors involved in the Project, both to collect data and information, and to discuss their elaboration and analysis; in particular we will involve:

- Vocational education and training experts included in the transnational partnership

- Participants to mobility projects (WP6), as well as in-company coaches and trainers, tutors or advisers involved in managing Mobility,

- stakeholders and actors involved in the valorisation / exploitation.

Evaluation as a whole will be set up looking for a strong integration with the works of the partnership, in the framework of a collaborative participation to transnational activities planned during the 2 years duration of the project.

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[1] For an overall definition of project expected outcomes, planning and specifications see Official submission form; as far as the main deliverable is concerned – the VQTS Matrix for the sector – the external evaluator will consider evaluative remarks and conclusions of prof. M. Becker, who will accomplish the specific task of assessing quality and value of the Matrix

Criteria and indicators

Three key criteria will be used in evaluation:

- **coeherence** of results with respect to the original or redefined aims and specific goals of the Project, including the respect of the timetable and of the methodological approach;

- **pertinence** of deliverables, with reference to the above mentioned aims, to the contexts of application and to different typologies of final users needs (usability, added value provided by the model / matrix, etc.)

- **sustainability** of results, considering opportunities and threats related to their implementation during and at the end of the Project (costs, coaching needs, stakeholders to involve....)

The simultaneous presence of indicators witnessing coherence, pertinence and sustainability of results and deliverables will define the effectiveness and efficiency of the Project.

The respect of the above mentioned criteria will be detected using a range of indicators, elaborated by the evaluator on the basis of data and evidences collected directly, and through the partnership, in relationships of testing activities foreseen by other WPs (see methods and sources)

Key indicators will include:

Evaluation area	Indicators
Project Management	- Respect of the timetable and deliverables (see WPs description) - Effectiveness and integration of coordination (national and international levels) - Efficiency of internal / external communication - Effectiveness of financial planning and management of the Project
Transfer of innovation	- Adaptability of the original Matrix and Quality of the transferred one (evaluation provided by the expert) - Effectiveness and coherence of the Matrix as a means for defining shared profiles and compare training pathways, as evaluated by the expert and by stakeholders and other actors - Usability of the Matrix as evaluated by the final users and by the actors in the framework of the piloting (mobilities – WP6) - Coherence of the overall approach with respect to the EU and national policies and tools (preliminary on desk analysis and ad hoc analysis of the final outcomes)
Transnational cooperation	- Coherence, effectiveness and integration of partners contributions - Efficiency and participation to transnational meetings - Capability to share codes and approaches, building up mutual understanding
Valorisation	- Number and significance of stakeholders and actors involved in the project - Level of adaptability of main outcomes to wider National contexts - Quality of deliverables (scientific approach, clearness, usability) – remarks and comments provided by the expert

Methodologies and sources

External evaluation, in combination with monitoring activities in charge of the coordinator, will provide the Project with a "*formative accompaniment*" playing an active role through feed-backs, remarks and suggestions. As a senior expert, the responsible for evaluation will assure:

- his participation to all transnational working groups and seminars of the project;
- his support to the coordinator in the production of reports and deliverables referred to evaluative aspects.

The external evaluator will also provide the coordinator, and the whole partnership, with a final evaluative report, including quantitative and qualitative data and suggestions.

As a component of the Quality Assurance system of the Project, evaluation will be supported by *monitoring data and information collected by the Project coordinator*. In addition sources for the evaluation will be *data on activities and outcomes referred to the testing of the Matrix in Mobility projects lead by the partners.* Fundamental hints to the evaluation will come from *remarks and conclusions of the expert in charge of assessing the quality of the Matrix*, with respect to the original Model (internal coherence, respect of concepts, parameters, etc.)

Evaluation will be supported by simple means, as electronic forms and grids facilitating the collection of data referred to satisfaction, opinions, remarks of partners, key players, stakeholders. Evaluation will be fed in addition by data collected directly during seminars or testing activities, using questionnaires, interviews, focus groups or simply through observation and recording relational dynamics.

On-line questionnaires – prepared by the evaluator - will be submitted – as stated in the submission form - to participants at each transnational meeting, to experts, to the students after their internships, to the examiners responsible for the assessments, to the trainers during the internships, to responsible for the VET of foreign trade, to the school boards).

Phases – deadlines - deliverables

External evaluation will be implemented according to the **Monitoring and Evaluation Plan** to be definitely approved during Köln kick off meeting, in October 2012. First of all the evaluator will elaborate an inception report, collecting information both during the meeting and submitting an on-line survey to the partners immediately after that. During the following phase, the evaluator will be accompanying project activities, participating to transnational meetings, and collecting information through on-line surveys and means, and through partner organizations. He will deliver:

1) an initial **ex-ante evaluation report** to assess and confirm, under the lens of partners opinions and remarks, the original specification in terms of needs and direction (to be delivered by the end of January 2013)

2) an **ongoing (process) evaluation**, to be performed throughout the running of the WPs, involving **short internal reports** (2 months after each transnational meeting)

3) a **final evaluation report**, considering process, inputs and outcomes according to criteria and indicators mentioned above (after 23 months from the beginning of the project – end of August 2014).

Overview of Evaluation Plan – WP8

WP 8:
Presentation of the proposal
(→ 10/2012) – Agreement on the mandate
Approval of this document during the kick off meeting, delivery of the mandate

Approval of External Evaluation Plan

Mandate to the External Evaluator (→ 10/2012)

WP 8: Ex Ante evaluation report (→ 1/2013) –
Initial on-line evaluative Survey (after the kick off meeting), summary of results, elaboration of remarks and suggestions

Mobility internships plan
(9/2013 – 5/2014)

WP 8: On Going process evaluation / internal reports
(→2013 / 2014) –
Progress on-line evaluative Surveys (after each meeting), summary of results, elaboration of remarks and suggestions

Testing of the Model (Matrix) in the framework of Mobility projects (→ End 5/2014)
On-line evaluative Survey (after the end of Mobilities) and summary of results

Final evaluative survey (stakeholders' based) and adaptation of Model/tools (6/2014)
Final Transnational Meeting and Conference (2014)
Final survey and evaluative focus groups with partners

Final Evaluation Report
(→ 8/2014)
Analysis of results, external evaluation report

ECAP