



Action

# National Coordinators for the implementation of the EU Agenda for Adult Learning in Italy

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01/11/2017 – 31/12/2019

## Monitoring and Evaluation Plan (WP 3)

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## General Introduction

The present document describes the whole of the monitoring and evaluation actions designed for the project **National Coordinators for the implementation of the EU Agenda for Adult Learning in Italy** to ensure the aims and outcomes achievement, consistently with the work programme approved and to support, if the case, the re-planning of the implementing process, with respect to *in itinere* decisions, occurrences, obligations and requirements.

Further, it is to be highlighted that the monitoring process is meant to supply the evaluation of interim and final project results by the side of both the European Commission and EACEA, providing the quantitative and qualitative data and information necessary for the interim and final assessment procedure and for the decision-making process.

## 1. National Coordinators for the implementation of the EU Agenda for Adult Learning in Italy project overview

### 2.1 The reason why

Italy remains one of the countries across Europe where the need to up skill is both great and most challenging. In particular:

- the percentage of adults scoring at or below level 1 in literacy in the Survey of Adult Skills (PIAAC) is 27.7%, (19.9% at EU-level), and in numeracy the results are 31.7% and 23.6% respectively. In addition, the percentage of individuals without basic digital skills is 57% of the population aged 16-74, 26 p.p. above the EU average;<sup>1</sup>
- although the participation in education and training of people aged 25-64 increased from 6.2% in 2007 to 7.5% in 2015,<sup>2</sup> the country ranks 15th in the EU and is still below the EU (10.6%) average.
- regarding the share of population with either less than primary or primary and lower secondary education (ISCED levels 0-2) Italy ranks 4th with 40.1%,<sup>3</sup> above both the EU (23.5%) average. Italy has stayed in the same position since 2006, but has improved by 8.6 percentage points (p.p.) since;
- concerning the share of the population with either upper secondary or post-secondary non-tertiary education (ISCED levels 3-4) Italy ranks 18th with 42.3%. This figure is slightly below the EU (46.5%) average, but it does represent an increase in comparison to the 38.4% rate registered in 2006.

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<sup>1</sup> Source: OECD.

<sup>2</sup> European Commission, Summary of the Partnership Agreement for Italy, 2014-2020, 2014. Available at: [https://ec.europa.eu/info/sites/info/files/partnership-agreement-italy-summary-oct2014\\_en.pdf](https://ec.europa.eu/info/sites/info/files/partnership-agreement-italy-summary-oct2014_en.pdf)

<sup>3</sup> Italy trails only Malta (56.5%), Portugal, and Spain in this ranking (latest data: 2015).



Significant policy efforts are being carried out to address this, however:

- there is a continuing need to strengthen employment services capable of promoting upskilling and tailored on individuals' needs;
- the reform of Provincial Centres for Adult Learning (hereafter PCAL, DPR 263/2012) introduced key innovations that are pertinent to the UP but may need further emphasis towards full implementation.

## 1.2 Project Goals

The project general aims are three, each one more specified in specific and operational objectives.

**The first aim** is the one to ensure the coherence and effectiveness of all policies affecting adult learning, including broader social and economic policies, through effective coordination between all relevant ministries, agencies, stakeholders, social partners, businesses, non-governmental organisations and civil society organisations. The governance issues remaining as a critical weak point, it is expected that the project activities will fill the gap existing among diverse behaviour of relevant stakeholders when they cope with similar problems and same target groups (especially low skilled adults).

**The second aim** is the one to ensure that adult learning provision (including any funded by ESF) is evidence-based, comprehensive, accessible and effective: even if the scale of the project allows for limited impact on this issue, nevertheless activities that are planned can stimulate this approach.

Finally, **the third objective** concerns the support to national debates and dialogue on adult learning policies and on ways to implement the strategy described in the Recommendation on Upskilling Pathways: New opportunities for Adults.

### 1.2.1 Specific objective(s)

Functionally linked to the first aim, the project activities are designed to increase opportunities for meetings and exchanges among relevant stakeholders and, by consequence, to increase consciousness on relevance of adult learning policies and on growing importance of new investments on these issues. It is therefore important to secure the commitment of all relevant actors and stakeholders to implementing the European Agenda for Adult Learning at national and regional level and to tackling adult skills deficits

With respect to the second aim, the specific objective focus on design and realization of quantitative-qualitative surveys on main issues and criticalities in the field of Adult Learning System and policies to deliver recommendation evidence-based to policy makers. Also in this field it is important the direct involvement of all stakeholders in data production and phenomena analysis, also in line with the action-research adopted approach.

Concerning the third aim it is expected to work linking closely the actions directly related to the Agenda implementation to the ones needed to accompany the implementation of Upskilling Pathways Recommendation. As a matter of fact, issues such rights of adults of pertinent and relevant training and education supply, quality and accessibility, valorisation of prior learning, evaluation and monitoring of policies are common.



### 1.3 Structure of the Workprogramme approved

The work plan is articulated in three transversal WPs and other four WPs each one focused on specific self-consistent activities relevant with the project main aim and specific objectives above described.

WP 1 includes mandatory activities such as general and financial coordination, regular inputs to EPALE and participation to the meetings organised by the EACEA. A Quality Plan and a Risk Assessment Chart support the implementation;

dissemination and capitalisation activities, according with a multichannel strategy described in a Dissemination Plan, are grouped in WP 2. These activities include the info sharing by website, periodical project newsletter, info brochures on project contents. Active participation to local, national and international events (seminars, workshops, conferences) complete the strategy, also taking on account that communication and sensitisation objectives will be also reached during the on field activities foreseen in WP 4-7;

the activities relevant to the project monitoring and evaluation objectives are included in WP3. KPI and source and methods of verification are described in Monitoring and Evaluation Plans. The foreseen activities cover the entire project implementation period;

WP 4 summarizes fieldwork and desk analysis research activities to cope with the the need to increase adult learning provision in basic skills or key competences for adult workers, also in order to raise consciousness among enterprises of the importance to invest in literacy and numeracy of their employees. A collection and analysis of existing practices of training provision involving modules on basic skills is foreseen among the WP specific activities;

the effectiveness and quality of the learning opportunities provision, delivered by both school system (CPIA) and private providers (mainly coming from third sector and training agencies), represent the focus of WP 5. Existing experiences, according with the results of research activities carried out during the 2015-2017 project implementation, highlighted that the quality and effectiveness of this provision can be improved in its effectiveness by a rapid adoption of a methodology for its evaluation, thus allowing the start up of the needed assessment exercise. According with the agreement with the Ministry of Education, an experimentation on application of the methodology of Peer Evaluation (also in line with the EQAVET recommendations) will be piloted by INAPP research team;

WP 6 comprises the realisation of interviews (using CAPI and CAWI methodologies) to cope with the need to reflect on the new roles requested and played by the teachers and Adult learning Centres Manager. The new roles imply the need to update and maybe redesign the contents of the curricula of these educators and, at the same time, to make important investments on national plans for their requalification pathways. The action is clearly linked with a PLA foreseen in WP7;

WP 7 activities will concern the organisation, management and participation of and to Peer Learning Activities. Apart those foreseen as compulsory (two per year, on issues and locations to be defined by EACEA), two additional PLAs are planned on issues as “The new role of Adult Educator: competencies and skills needs” and “Competencies validation effective processes and tools as starting point for Upskilling (suggested) Pathways implementation”.



## 2. Structure and principles of Monitoring plan

Project monitoring action goals are:

- to ensure the conformity and regularity of project activities;
- to verify the achievement of interim and final goals and outcomes expected;
- to highlight the possible divergences between what has been planned and what has been realized;
- to support the identification and adoption of solutions which can properly guarantee the achievement of fixed project objectives.

The presentation of the monitoring Plan has been articulated in the following areas and topics:

- ✓ Methodological framework of the monitoring action
- ✓ Monitoring tools
- ✓ Project Monitoring Plan

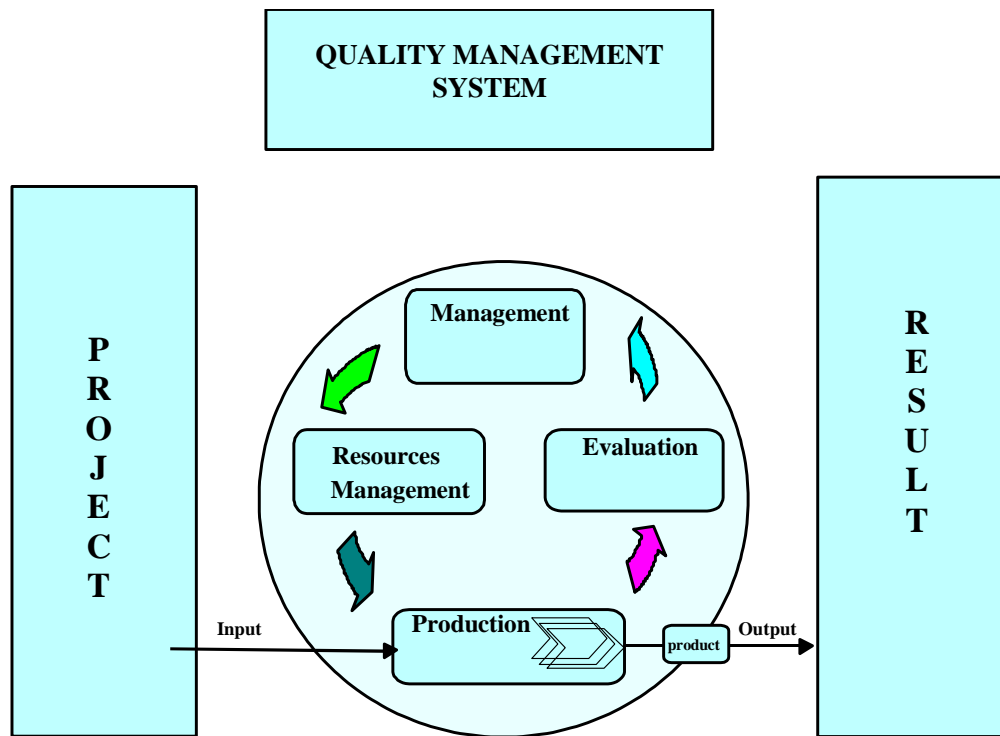
### 2.1. Methodological framework

The methodology chosen refers, first, to the *Erasmus+ KA3 features*, to be considered as a general background (particularly: innovation and policy support and advice). Within this framework, the project must be necessarily approached as a “whole” and, by consequence, the monitoring action must control and follow the entire **project life-cycle**, by taking into account the connections between the different components which are activated during its implementation.

Up to the purpose, the partnership decided to focus on the topic of **quality** and the **possible application of quality issues to training/transfer processes**, since *an expected result can be achieved with greater effectiveness if the related resources and activities are managed as a process*.

As a matter of fact, a project can be considered as **a place where processes are activated**, where “processes” mean the whole of related or interacting activities which turn *incoming elements* in *outgoing elements*.

Therefore, a project can be managed and controlled according to a **Quality Management System** (QMS – *see figure 2 below*), that is, it can be thought as *a place where quality is developed* and so *it produces phenomena which can be subject to quality control*.



The QMS model is based on four main pillars:

1. Management responsibility;
2. Resource management;
3. Product realisation;
4. Measurement, analysis and improvement.

By consequence, the model proposed in the following pages, implies the realisation of several actions (to which are related specific expected outcomes) as for example:

- scheduled monitoring surveys on specific themes or components of the Project, by using questionnaires sent via e-mail;
- iterative activities of systematisation of data and information concerning the project;
- drafting of analysis synthetically describing the progress of each project WP;



- elaboration of *fiches* describing the products/results realised and achieved in general of with respect to each project WP;
- producing of yearly reports.

As already mentioned, the *desk analysis* is the main – but not the only - method that will be applied through the work out and use of **questionnaires (semi-structured grids)** focused on some relevant issues:

- Project redefinition or adjustments
- Administrative management
- Objectives achievement/Products implementation
- Self-evaluation/Quality Control
- Dissemination.

In terms of outputs, further to an analysis of the collected data, **monitoring reports (Interim – October 2018 and Final – December 2019)** will be produced which will represent, with an additional chapter containing a synoptic and synthetic analysis of the results, the source-base for the **final internal evaluation report**.

### 2.1.1 Typologies of Project Monitoring

In applying the model proposed, have been considered also the different typologies of monitoring implied, since it is necessary to control and check the different dimensions which describe the progress of an intervention. The Plan here proposed answer to the necessity of implementing (see figure 3 below):

- Physical monitoring
- Financial monitoring
- Process monitoring

**Figure 3 - Typologies of monitoring**

<b>“Physical” Monitoring</b>	Even if may be difficult to state what <b>“physical data”</b> consist of, given the peculiar features of projects, it is possible to say that they are basically: <ul style="list-style-type: none"><li>• those concerning the <b>financial resources</b> by project phase and budget heading, on the whole project and in the breakdown per partner as established in the contracts;</li><li>• those concerning the <b>products</b> (product typology, medium typology, target</li></ul>
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	typology, language, dimensions).
<p><b>Financial Monitoring</b></p>	<p>Referring to the QMS model above mentioned, the financial monitoring is generally implemented in order to:</p> <ul style="list-style-type: none"> <li>• verify the correct fulfilment of contractual obligations;</li> <li>• support the EACEA decision making as for requests of amendment to the agreement;</li> <li>• supply with an exhaustive picture on how INAPP ensure an effective management of financial, temporal, human and infrastructural resources;</li> <li>• highlight the different coordination styles and communication practices the project management has recourse to in order to support the decision-making process.</li> </ul> <p>Financial monitoring supports the check of project <i>progress</i> focusing the attention on basic events such as:</p> <ul style="list-style-type: none"> <li>• <b>agreement deadlines</b> (signature of contracts, submission of Interim and Final Report);</li> <li>• <b>financial flows</b> (between the EACEA and the Co-ordinator – by checking the reception of the grant instalment; potential <i>in itinere changes</i> (budget redefinition by cost heading.</li> </ul>
<p><b>Process Monitoring</b></p>	<p>The project will be implemented within the framework of Erasmus+. This process is grounded on the implementation of actions which necessarily ask for the integration among stakeholders and policies of the different national, regional and sectoral contexts. In this frame, to monitor the process of the project gives the opportunity to enrich the understanding of project activities with information concerning, for instance:</p> <ul style="list-style-type: none"> <li>• the relationships, decision making and communication modalities within the institutional and socio-economic stakeholders;</li> <li>• their capabilities in terms of organisation, identification and solution of problems;</li> <li>• the strategies and channels used to disseminate results;</li> </ul> <p>In this case, the related actions must not be limited to verify the variance between planned and realised activities, but they must be based on a participated and active observation of the project processes and of its results (for instance, during the meetings or seminars). Such an approach implies the integration of “direct” and “indirect” observation modalities of project processes, aimed at collecting data and information through an analysis of interim and final products/results.</p> <p><u>Direct observation will be implemented through:</u></p> <ul style="list-style-type: none"> <li>• the analysis of meetings with stakeholders;</li> <li>• the use of tools aimed at reviewing or re-planning some specific aspects of the project life-cycle, through the iterative and scheduled delivery of questionnaires,</li> </ul> <p><u>while on the other, indirect observation will be aimed at</u> codifying and organising the information concerning the outcomes and outputs related to each workpackage and sub-activity.</p>



## 2.2 Monitoring Tools

Tools to be used to collect information must necessarily be of different kind, not only because of the nature of the *phenomena* investigated, but also to answer the need of carrying out specific analysis at different stages of the project implementation. These tools should be **"user friendly"** and **adjustable in itinere**, they must integrate closed structures - to verify what exists in terms of presence/absence and quantity - and open structures, aimed at highlighting the qualitative/descriptive elements of the process and the possible weaknesses and criticalities encountered. Further, monitoring tools must be **articulated** in order to meet the complexity of the project and the plurality of elements which needs investigation, but nevertheless they must also be **light and easy to be delivered**.

Tool	Sampling criteria WHEN	Quality control area WHAT	Observation
Project Quality Plan	-	Management Production Evaluation	Indirect
Structured questionnaires	periodically	Management Production Evaluation	by e-mail
Protocol for carrying out semi-structured face-to-face interviews	-	Management Resources Management Production Evaluation	Direct To be defined, if the case
Financial monitoring questionnaires (Excel sheet)	periodically	Resources management Management	by e-mail
Grid for meetings observation	To be adopted during meetings planned	Management Resources management	Direct
<i>Fiche</i> describing project process	All project's components two times during the lifecycle of the project	Management Resources Management Production Evaluation	Indirect



### 2.3 Project Monitoring Plan

The Monitoring action – implying specific activities and tools - is strictly related to the implementation of a Quality Management System that is requested to be applied to each project approved and that implies the adoption of a range of solutions aimed at ensuring:

- Process transparency
- Sharing of general and specific goals among the actors involved and definition of specific roles and tasks
- Outcomes measurability
- Prevention of non-conformity risks
- Management of variables.

In this frame, the Monitoring Plan is a tool applied within working teams and partnerships with the aim of:

- creating the conditions to continuously verify the project work in progress and the achievement of expected interim and final outcomes, so as:
  - to highlight the possible divergences between what has been planned and actually realised;
  - to identify the risk areas;
  - to adopt the proper measures apt to ensure the achievement of goals defined.
- following and supporting the operative and strategic management of the project itself, in order to make the partnership able to:
  - control and evaluate the project quality;
  - make eventual changes or adjustments in itinere;
  - report to the EACEA (contents and financial issues).

At this purpose, the Plan has been structured to implement the regular check of the activities planned – at least the most important ones – and related expenses implied. The macro-areas that will be under control, during the whole life cycle of the project, are:

- a) Actions and products realised with respect to the ones planned;
- b) Actual implementation timings, with respect to the ones expected;



- c) Financial resources spent (cash flows), with respect to the ones available (budget) or foreseen;
- d) Goals and outcomes achieved.

### 2.3.1 Areas/documents of reference

To work out and implement a Monitoring plan apt to control the conformity between planned and realised, it is first necessary to identify both the specific areas and the documents on which this conformity is grounded.

In particular, areas of reference are:

- ✓ Budget;
- ✓ Timetable;
- ✓ Production Process,

and, by consequence, the documents that the INAPP (project staff) and administrative services must know, take into account and share all along the project life cycle are:

- the proposal approved, where are indicated the general and final goals of the project, direct and indirect beneficiaries, final and interim outcomes and outputs foreseen;
- the project workplan approved, where are provided all detailed information related the actual implementation of the project, step by step;
- the project total budget;
- the detailed budget for each partner involved;
- the Agreement with the Authority financing the intervention (EACEA)
- the administrative and financial procedure ruled by the Programme/Authority financing the intervention, concerning the financial accounting, the activities reporting, the *in itinere* monitoring and evaluation, etc.

### 2.3.2 Project monitoring process

The Monitoring action is implemented through (see figure 5 following) :

- Periodical Desk analysis (activities and financial resources)
- Interviews to main actors of implementation process (if necessary, to complete or deepen desk analysis results)



- periodical reports on monitoring results
- yearly reports

METHODS	AIM	TOOLS	HOW AND WHEN
<b>Desk analysis</b>	<i>To Monitor workplan activities and related outputs work in progress</i>	<b>Questionnaires</b>	<i>Delivering by e-mail every 6 months</i>
<b>Interviews to main actors of implementation process</b>	<i>To complete or deepen desk analysis results</i>	<b>Interview grids</b>	<i>Direct or Indirect, if necessary and when necessary</i>
<b>Budget flow analysis</b>	<i>To monitor project expenses (cash flow)</i>	<b>Format tool designed with reference to the formats provided by the EACEA</b>	<i>Delivering by e-mail every 4 months</i>

### 2.3.2.1 Areas under monitoring

The main areas to be periodically checked are:

- Activities planned for each Work Package of the Workprogramme approved
- Outputs production and planning
- Dissemination and valorisation of outcomes/outputs
- Timings and deadlines
- Human and financial resources implied

*All these aspects must be monitored using specific tools and respecting fixed timings.*

### 2.3.2.2 Contents

As above mentioned, the monitoring will be realised mainly through a desk analysis action, using semi-structured grids that will be sent to all partners, by e-mail. All partners will be requested to fill in the grid and send it back respecting the deadlines provided. In particular, the aim will be to detect the work in progress of:

- Specific activities or actions;



- Outputs realisation;
- Dissemination outputs and outcomes;
- Timings foreseen;
- Budget spent.

Every grid sent will refer to a specific Work package of the project workprogramme and the information requested would concern one or more activity included in the work package concerned. In the same grid the partners will be also asked to provide some analytical and quality information, in order to provide a kind of self- evaluation of the work done or of the situation approached.

As an example, the main K-questions would be:

- *Description of possible divergences/difficulties encountered, with respect to planned and realised activities, and reasons related;*
- *Recovery actions or solutions adopted;*
- *Outputs realised or in progress.*

### 2.3.2.3 Formats

Formats to be used and filled in will be articulated as follows:

1. Report on activities
2. Report on Dissemination Activities
3. Report on beneficiary's evaluation (feedback) of project activities (for instance during dissemination activities)
4. Financial cash flow

*All data requested will be necessary also to report on the project work in progress to the EACEA (Interim and Final Report). Interim and Final Reports, in fact, imply - with respect to the project workprogramme approved - detailed info on:*

- project activities realised;
- project outputs;
- project outcomes (quantitative/qualitative impact on targeted national contexts involved in the transfer action);



- dissemination activities realised (implying quantitative/qualitative info on project beneficiaries; typology of tools/actions, samples of tools/materials);
- financial resources spent (detailed info on budget cash flow, consistently with financial and administrative rules of Erasmus+ Programme).

### 3. Structure and principles of “National Co-ordinator of EU Agenda for Adult Learning Implementation in IT” project Quality Assurance and Evaluation plan

#### 3.1 Introduction

The aim of the Quality Assurance and Evaluation Plan is to deliver clarification and guidance to procedures and criteria used to quantify and qualify the entire project and the work packages’ efficiency separately.

The monitoring and evaluation are tools for PM to support and quality assurance. The philosophy of evaluation is participatory, seeking the active involvement of all stakeholders. The evaluation aims to give guidance to the project partners for possible adjustments in the implementation of tasks<sup>4</sup>.

#### 3.2 Scope

This Quality Management System<sup>5</sup> aims at:

- ensure ongoing progress and achievement of interim and end;
- highlight non-compliance between planned and realized,
- to identify areas of risk measures preventive / corrective allow, therefore, a constant repositioning of the intervention objectives.

The overall structure of this Quality Plan (content, method, tools) will be based on the distinction between:

- **Control:**  
verification of eligibility and conformity implementing the administrative level;

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<sup>4</sup> “Quality”, for the purposes of this project, means:

1. Do what you promised (*compliance with application*)
2. Meet the requirements (*users’ needs & expectations*)
3. Fitness for use, not perfection (*suitability, usability*)
4. Everything that can be improved:
  - a. Evaluate products, outcomes and results
  - b. Evaluate processes and procedures

<sup>5</sup> See also the Project Quality Plan, in which concepts and activities are better defined. Here you can see the close relationships between Quality issues and Evaluation aims



- **Monitoring:**  
comparison iterated the progress of the implementation (process / outputs) than planned, to identify gaps and formulate hypotheses and coping strategies. Criteria and indicators relate to specific operational objectives to be pursued according to the times, methods and resources, data;
- **Evaluation:**  
monitoring the implementation of the project in terms of outputs, results and impacts overall and specific products (groups / target systems) or in contexts that can produce target. Criteria, indicators, parameters and indexes cannot be defined universally and free content, but are determined from the general and specific objectives of the action to be evaluated.

This Quality plan is defined at the start of the project and the final version is agreed upon mutual agreement with the partners.

The aim of quality assurance is:

1. ensure the quality, effectiveness and efficiency of the implementation of the project activities.
2. ensure the achievement of objectives.
3. monitor and Assess the compliance between planned and carried out during the implementation process of the project.
4. ensure the constant monitoring and evaluation of the process, the results and the administrative and financial aspects of the project.
5. develop and share methods, indicators and parameters for quality control and instruments of detection of quantitative and qualitative data.

### 3.3 Formative objectives

The formative objective is by using the PDCA-circle (*E.W. Deming*) to monitor the program implementation and results, as a support to continuous improve the products and process.

It gives tangible and objective measures of the performance and uses a set of indicators. They define the target level, which will correspond to the objective of the programme.

- *Resource indicators* refers to the budget allocated, *financial* are used to monitor progress of commitments and payments (e.g. Interim financial report)
- *Output indicators* refers to the activities;
- *Result indicators* (e.g. evaluation of a meeting)
- *Impact indicators* refer to the consequences of the project.

### 3.4 Summative evaluation (internal audit)

Before the presentation of the interim and final report, an internal audit will check if the main results, recommendations and statistical data obtained during the project, and the main administrative and financial details on the projects' progress agree with the project requirements.

The output of the summative evaluation is used for Interim reporting to the EACEA and used therefore as guide for final Report.

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The aim of internal assessment is to provide the partnership with internal evaluation tools of its activities and facilitate the partners in controlling and monitoring each step of the project.

### 3.5 Evaluation Methods

In the evaluation a mixed method of combining quantitative and qualitative data is used.

Methods are:

<i>Evaluation method / tool</i>	<i>When/where</i>
Interviews (in-depth; and by telephone)	during project meetings
Desk analysis	project reports, minutes, brochure, e-communication between partners, deliverables
Observation	during project meetings, Workshops/Conferences

In terms of action, it is expected:

- 1. Development plan monitoring and evaluation (M3).**  
The Plan includes project milestones and associated deliverables. To apply the internal control compliance implementation in progress, in addition to indicating procedures, instruments and specific deadlines are shown documents which Staff members should refer (eg. project work plan, budget, timetable and organization, etc.);
- 2. Preparation format detection and quantitative data.**  
The comparability of data is essential for the efficient communication between the partners and the sharing of work in progress;
- 3. Implementation periodic desk analysis**
- 4. Detection of periodic financial resources**  
The cash flow is an important aspect to be kept under constant control as it relates to operations and production. The survey is useful for identifying potential losses or reserves which, if not corrected, could adversely affect compliance with the programmed. This recognition is also needed to comply with the financial monitoring procedures required by the same EACEA.
- 5. Development of two reports (interim and final)**

Other criteria used are the descriptions of the aims and the deliverables as described in the project plan.



### 3.6 Planning and tools used

<i>Product / activity to be developed or evaluated</i>	<i>F=form S=sum</i>	<i>Evaluation method / tool</i>	<i>Result</i>
<b>Development plan monitoring and evaluation</b> including <ul style="list-style-type: none"> <li>- project milestones and associated deliverables.</li> <li>- indicating procedures, instruments and specific deadlines</li> <li>- List of documents which partners should refer to (eg project work plan, budget, timetable and organization, etc.).</li> </ul>		Planning monitoring and evaluating	Monitoring and evaluation plan (this output)
<b>Preparation of formats</b> for <ul style="list-style-type: none"> <li>- evaluation questionnaires</li> <li>- grids and reports</li> <li>- records</li> <li>- observation indoor / outdoor (beneficiaries and staff involved in the project implementation)</li> <li>- format for detection of periodic cash flows of the project.</li> </ul>	Prep	Preparation monitoring and evaluating	Questionnaires Formats for grids and reports Format for record sheets Formats for observation
<b>Financial monitoring</b> Financial survey: <ul style="list-style-type: none"> <li>- identifying potential losses or reserves which could adversely affect compliance with the programmed.</li> <li>- comply with the financial monitoring procedures required by EACEA.</li> </ul>	S	format for detection of periodic cash flows of the project.	Interim report (M11) Final report (M23)
<b>Summative survey</b> obtain information on specific areas of control: <ul style="list-style-type: none"> <li>- activities carried out,</li> <li>- problems encountered</li> <li>- corrective actions taken.</li> </ul> Goal: monitor compliance and implementation regularity and obtain information critical analysis and evaluation.		Questionnaire Interview	

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**Allegati**

## ANNEX 1 - Report on activities

**PERIOD COVERED BY THE REPORT:** from **dd/mm/yyyy** - to **dd/mm/yyyy**

<b>Work Package N.</b>			
<b>TITLE</b>			
<b>START DATE</b>	<i>dd/mm/yyyy</i>	<b>END DATE</b>	<i>dd/mm/yyyy</i>

<b>REPORT ISSUED BY</b>	
<b>AUTHOR</b>	
<b>DATE OF ISSUE</b>	<i>dd/mm/yyyy</i>

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## **1. ACTIVITIES REALISED**

*(please provide a detailed description of the activities implemented, focusing on: process and methodology adopted, subjects involved)*

## **2. DEVIATIONS FROM INITIAL PLANNING AND REASONS RELATED**

*(Referring to point 1 above, please describe in details the difficulties encountered and reasons related)*

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### 3. RECOVERY ACTIONS ADOPTED

*(Referring to point 2 above, please describe the solutions adopted to overcome difficulties)*

### 4. RESULTS/PRODUCT REALISED OR IN PROGRESS

Please provide a detailed description of all results/products related to the activities realised. For each result/product, please provide the following information:

<b>Realisation process</b>	
Completed <input type="checkbox"/>	
In progress <input type="checkbox"/>	estimated percentage(%) of work completed: _%

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<b>Result/Product Type</b>	
<b>Result/Product language/s</b>	
<b>Medium used</b> ( <i>e.g. paper, cd Rom, text, database etc.</i> )	
<b>Findings, conclusions and lessons of evaluation and testing</b>	
<b>Was the result/product/process modified respectively adapted after evaluation and testing?</b>	

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## ANNEX 2 - Report on Dissemination activities

*All materials produced/used for dissemination activities should be attached to the present format*

**PERIOD COVERED BY THE REPORT:** from **dd/mm/yyyy** - to **dd/mm/yyyy**

<b>Work Package N.</b>			
<b>TITLE</b>			
<b>START DATE</b>	<i>dd/mm/yyyy</i>	<b>END DATE</b>	<i>dd/mm/yyyy</i>

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<b>REPORT ISSUED BY</b>	
<b>AUTHOR</b>	
<b>DATE OF ISSUE</b>	dd/mm/yyyy

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### DISSEMINATION AND EXPLOITATION OF PRODUCTS/RESULTS

Describe clearly and briefly the progress of the activities for the dissemination and exploitation of results filling in the following table.

If possible, refer to each result/product described in Annex 1 point 4.

<b>No.</b>	
<b>Activity description</b>	
<b>Activity start date (dd-mm-yyyy)</b>	
<b>Targeted sectors</b>	
<b>Targeted groups</b>	
<b>Activity number of participants</b>	
<b>Which institutions/organisations were targeted?</b>	
<b>Organisation type</b>	
<b>Why have these institutions/organisations been chosen, and what is their relevance towards the project objectives?</b>	



## GENERAL COMMENTS

### 1. DEVIATIONS FROM INITIAL PLANNING AND REASONS RELATED

### 2. DESCRIBE THE RESULTS AND FEEDBACK RECEIVED FROM STAKEHOLDERS (TARGET GROUP OR SECTOR) OF IMPLEMENTED DISSEMINATION ACTIVITIES.



### ANNEX 3 - Evaluation of Dissemination Seminars

<b>SEMINAR N°:</b>			
<b>PLACE (City):</b>		<b>REGION</b>	
<b>DATE:</b>			

<b>REPORT ISSUED BY</b>	
<b>AUTHOR</b>	
<b>DATE OF ISSUE</b>	dd/mm/yyyy



**1. Was the Logistics of the Seminar appropriate?**

yes

no

**2. Could you please signify your satisfaction degree about the following aspects?**

	<b>Fully satisfied</b>	<b>Fairly satisfied</b>	<b>Not much satisfied</b>	<b>Unsatisfied</b>
Clearness of meeting aims				
Exhaustiveness of the documents received				
Clearness of the type of contribution requested to each partner				
Relevance of the Agenda				
Relevance and Quality of speakers' reports				
Quality of materials distributed				
Level of Interaction achieved with the audience				
Consistency with expectations				



**3. On the whole, how would you describe your attendance to the Seminar?**

Very useful	Fairly useful	Not much useful	Useless

**4. Advices and suggestions to improve the quality of the following Seminars**



## **ANNEX 4 - Audience evaluation of Dissemination Seminars**

**to be filled in by each participant/**

**“Title of the Seminar”**

*Date and venue*

*Dear Sir / Madam,*

*hereby you will find a short Questionnaire that would help us to assess the quality of the Seminar. Your suggestions will represent an important contribution for the improvement of our next meeting.*

*We kindly ask you to fill in the Questionnaire and remit it to our staff.*

*We thank you for your co-operation*

*The EU AL Agenda for Adult Learning Staff*



Name	
Function	
Organisation	
Field of activity of the Organisation	

*Do You wish to receive more information concerning the project?*

Yes, by e-mail

Your e-mail: \_\_\_\_\_

Yes, by post

Your address: \_\_\_\_\_

**1. Have you received the invitation in time to organise your participation?**

yes

no

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**2. Was the Logistics of the Seminar appropriate?**

yes

no

**3. Could you please signify your satisfaction degree about the following aspects?**

	<b>Fully satisfied</b>	<b>Fairly satisfied</b>	<b>Not much satisfied</b>	<b>Unsatisfied</b>
Clearness of meeting aims				
Exhaustiveness of the documents received				
Clearness of the type of contribution requested to each partner				
Relevance of the Agenda				
Relevance and Quality of speakers' reports				
Quality of materials distributed				
Level of Interaction achieved with the audience				
Consistency with expectations				





**4. On the whole, how would You describe your attendance to the Seminar?**

Very useful	Fairly useful	Not much useful	Useless

**5. Referring to Question 4, could You please provide a short explanation?**

**6. Any advices or suggestions to improve the quality of our following Seminars?**



## ANNEX 5 - FINAL REPORT ASSESSMENT SHEET

### 1. Objectives, results and products

- Are all planned project outcomes / results available and are they in accordance with aims and objectives as declared in the original application or as officially amended?

SCORE					
0	1-2	3-4	5-6	7-8	9-10

Please, comment:

### 2. Coherence between work programme and activities carried out to date

- Have the planned activities been implemented in accordance with the project's work programme as declared in the original application, or as officially amended, and have any variations been adequately justified?

SCORE					
0	1-2	3-4	5-6	7-8	9-10



Please, comment:

### 3. Management

- How was the project managed?
- Have any variation from original plans been adequately justified?

SCORE					
0	1-2	3-4	5-6	7-8	9-10

Please, comment:

### 4. Financial management

- Is the expenditure appropriate and in line with the approved Work programme?
- Is the expenditure appropriate and in line with the project's activities as described in the Final Report?
- Is the expenditure in line with the level of project's implementation ("best value for money" principle)?

SCORE					
0	1-2	3-4	5-6	7-8	9-10



Please, comment:

### 5. Evaluation and/or quality assurance

- How well was the project's strategy for evaluation implemented?
- Were there significant changes compared to the original application?

SCORE					
0	1-2	3-4	5-6	7-8	9-10

Please, comment:

### 6. Dissemination

- How effectively did the project carry out its plan for dissemination?
- What is the quality of the dissemination activities?

SCORE					
0	1-2	3-4	5-6	7-8	9-10

Please, comment:



### Supplementary information to be submitted

Supplementary information required from the project to allow for a complete Final Report analysis:

### OVERALL EVALUATION

#### Overall comment:

#### Strong points:

#### Weak points:

### SCORING SYSTEM

Score	Definition	Description of score
0	No evidence	Fails to include a minimum amount of evidence to enable the criterion to be evaluated
1 or 2	Very weak	Addresses the criterion but with significant and/or many weaknesses



3 or 4	Weak	Addresses the criterion but with weaknesses
5 or 6	Acceptable	Addresses the criterion sufficiently
7 or 8	Good	Addresses the criterion with some aspects of high quality
9 or 10	Very good	Addresses the criterion with all aspects of high quality

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## ANNEX 6 – Project timetable

Workpackages	2017		2018												2019												
	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	
<b>WP1-Coordination Stakeholders relevant for Adult Learning</b>																											
1.1.Consolidation of the existing Steering Comm.																											
1.2.Definition of management tools: Quality Plan and Risk assessment Plan																											
1.3.Periodical meeting of Steering Committee																											
1.4.Administrative checks and control																											
1.5.Interim and final Report (financial)																											
Co-ordination with EPALE																											
1.6.Participation in up to 2 meetings per year by the Commission and/or EACEA																											
<b>WP2- Dissemination</b>																											
2.1.Project Communication Plan																											
2.2.Project website																											
2.3.Online newsletter (6)																											
2.4.Info brochure																											
2.5.National events (3)																											
2.6. National events organized by other MS (2)																											
2.7.Dissemination of the project Final Report																											
<b>WP3-Project Monitoring and Evaluation</b>																											
3.1.Design of monitoring and evaluation plans																											
3.2.Implementation of monitoring plan (4)																											
3.3.Implementation of evaluation plan (4)																											
<b>WP4 Survey on Basic Skills Provision In Enterprise</b>																											
4.1.Design panel of interviewed/observed subjects (20+5)																											
4.2.Questionnaire design and distribution (2)																											
4.3.Collection and selection of best practices (20)																											
4.4.Report drafting																											
<b>WP5_Implementation of Peer Review Meth.</b>																											

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Workpackages	2017		2018												2019												
	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	
5.1.Definition of areas considered in pilot appl.ion																											
5.2.Definition of A. L. Centres and T. A. involved in Pilot experimentation																											
5.3.Training of teachers and trainers for implementation of the Peer Review methodology																											
5.4.Pilot experimentation of the Peer Review approach																											
5.5.Report drafting on the experience: Swot analysis and recommendations to policy makers																											
<b>WP6-Survey on New Roles And Competencies of Adult Educators</b>																											
6.1.Questionnaire design and submitting to a panel of interviewed/observed subjects (300-400)																											
6.2.Collection of samples of requalification pathways for teachers/trainers																											
6.3.Study visits in three Countries																											
6.4.Evidences analysis (quantitative-qualitative) and Report drafting																											
<b>WP7_Peer Learning Activities (Compulsory and Additional Events)</b>																											
Transnational Cooperation																											

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