



Evaluation Strategy and Instruments (O1)

Intergenerational partnership Over 55/ILPO55

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Content

1. Introduction
2. Project summary
3. ILPO55 consortium
4. Types of evaluation
5. Evaluation process (O1-A1)
6. Evaluation tools (O1-A2)
7. Summary
8. Annexes

1. Introduction

Project evaluation is a systematic method for collecting, analyzing and using information to answer questions about the project. This definition focuses on the question of whether the project has, as indicated, the intended effect. However, equally important are questions such as how the program could be improved, whether the program is worthwhile, whether there are better alternatives, if there are unintended outcomes, and whether the program goals are appropriate and useful.

The objectives of evaluation and quality assurance within ILPO 55 are:

- To define the quality standards (e.g. ILPO 55 evaluation matrix),
- To define quality control procedures (e.g. Logic model),
- To ensure that the project processes comply to the standards set,
- To ensure that every deliverable conforms to requirements and specifications,
- To propose remedial actions and effectively confront quality problems which might be presented.

Development and revisions of the project's Evaluation strategy and instruments is done by the Leader of the activity - Institute of Banking Education of the National Bank of Slovakia, n.o. (IBE NBS), which defines the criteria for monitoring the progress of specific project processes and the quality of the corresponding outputs in light of the objectives set by the project and general quality assurance considerations. Partners were asked to review the quality assurance plan and provide feedback for improvement before its finalisation.

For effective quality assurance, the Evaluator will rely on accurate and timely reporting by the Lead Partners and where applicable by partners contributing in parts of a planned deliverable. To ensure this process, specific reporting forms will be used attached in the Annex, according to the quality assurance plan, and information will be gathered through the project's internal communication channels. The review of quality process will be done according to the provisions of the quality assurance plan, and it will result in evaluation and quality assurance reports. The two interim and final reports will be sent to all partners, to inform on implementation, adherence to the quality standards and corrective actions to be taken where needed. Besides the communication taking place through these reports, the Evaluator will intervene promptly each time a quality shortfall is detected or there are indications that work carried out is following a method that will not lead to a high quality output.

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2. Project summary

The aim of this project is to create an Intergenerational Learning Partnership - ILPO55 (involving education & training providers, employers and employees) that will support the employability and will reduce the skills mismatch of the over 55 employees from the Financial Services Sector (FSS), and also new/existing employees. The project will set-up the ILPO55 Reference Framework which will address the over 55 individual needs with a 360° perspective:

- a. analyse education & training and work experiences;
- b. assess individual competencies (knowledge, skills and competencies);
- c. identify personal and professional objectives (e.g. Professional Consultant);
- d. support over 55 individuals in planning their future career/work experiences; give advice regarding the existing opportunities for
- e. validation of competencies and recognition of prior learning;
- f. provide support for further education and training of the over 55 individuals (based on the training needs identified in relation to the personal and professional career development objectives).

Moreover, the project aspires at creating two professional qualifications (Adult Trainer and Social Responsibility Facilitator) and training programmes that can be valorised by the over 55 both within the FSS and in other business sectors).

Methodological approach and key outputs

Since the very beginning of the project partners will define the concrete methodological strategies and approaches for managing the evaluation process during the lifetime of the project. The consortium will design and launch the project official website. Then, Partners will identify existing needs and gaps in the field of age management and intergenerational cooperation and will collect and analyse examples of good practices in the field. The next step will be to define the Courses curricula for the two ILPO55 Qualifications (Adult Trainer and Social Responsibility Facilitator). Partners will develop the ILPO55 Reference Framework, for developing methods and tools for competence evaluation and designing methodologies for supporting the professional development. The results will be piloted and validated during the project piloting phase and will be tuned at the end of the project, made available online, on the website. These results will be included in the final publication of the Project and will be further exploited with open licence.

Impact and long term benefits

The project results will be disseminated in the Partner countries (Malta, Italy, The Netherlands, Spain and Romania). In addition, Partners will also advertise them at international level, valorizing Partners' Networks and collaborationist the beginning of the project Partners will agree on the

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Intergenerational partnership Over 55/ILPO55
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dissemination and exploitation concrete plan. This will include definitions, information and guidelines about. The main key project result will be made available to the public through the project website and also using Partners' websites and communications channels (Magazines, Newsletters, learning ICT eco-systems).

Moreover, the Reference Framework, the two Qualifications, the description of course curricula, assessment procedure and training programmes will also be included in the Final Project Publication that will be distributed through ICT channels to the most relevant national and European stakeholders.

The goal for the partnership is to be able to use the materials within their own activities and to promote its usage within their networks (at national and European level).

At the end of the project, the partners will sign a ILPO55 Common Declaration whereby they will declare their support and determination to implement the ILPO55 Reference Framework in their activities regarding age management and intergenerational cooperation in the FSS.

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3. ILPO 55 Consortium

The project brings together 10 partners from 6 European countries, forming a transnational cooperation partnership with a balanced regional geographical representation of the Erasmus+ area and with qualitative representation for Malta. Moreover, the project is highly supported by the European Banking Federation.

Most of the partners have collaborated together within EBTN (The European Banking and Financial Training Association) on previous European projects aiming at enhancing lifelong learning policies and practices in the FSS. The main themes where Partners are experienced are: definition of qualifications, validation of prior learning, validation of non-formal and informal learning, certification, quality assurance. Partners include:

MCAST is the leading vocational institution in Malta.

IFS Malta is experienced in promoting and fostering professionalism among financial services practitioners.

MBN is very much involved in the analysis of the education, training and work experience in the banking industry.

MUBE as social partner is very much involved in policies regarding career development of FSS employees and had important experience in working on European projects.

Effebi Association has a consolidated experience in the management of EU funded projects in the field of lifelong learning.

UNINETTUNO has a wide expertise in developing and delivering ICT based educational and vocational training programmes to HEI students.

NIBE SVV is very much experienced in development and delivery of education and training programmes for the educational institute for the Dutch banking, insurance and investment sector.

ANUP had a wide experience in European funded projects, in education and training programmes and cooperation with the business community and policy makers.

Scienter CID (IEF – Amendment to the contract) is experienced in innovation of training systems, with main reference to the field of Open and Distance Learning,

IBE NBS provides qualifications and skills enhancement for the financial sector employees. It has the relevant international and local experience and capacity to produce learning outcome based curricula for the banking sector and contribute to the Lifelong Learning.

4. Types of evaluation

Formative evaluation is generally any evaluation that takes place before or during a project's implementation with the aim of improving the project's design and performance. Formative evaluation complements summative evaluation and is essential for trying to understand why a program works or doesn't, and what other factors (internal and external) are at work during a project's life.

Formative evaluation does require time and money and this may be a barrier to undertaking it, but it should be viewed as a valuable investment that improves the likelihood of achieving a successful outcome through better program design. There are several categories of formative evaluation. Proactive and clarificative evaluations can also be referred to as *ex-ante* evaluations (meaning before the event).

Table 1 Categories of formative evaluation:

	Proactive	Clarificative	Interactive	Monitoring
When	Pre-project	Project development	Project implementation	Project implementation
Why	To understand or clarify the need for the project	To make clear the theory of change that the project is based on	To improve the project's design (continual improvement) as it is rolled out	To ensure that the project activities are being delivered efficiently and effectively
Examples	Literature Review Stakeholder Analysis Problem / Solution tree analysis	Logframe Matrix Program Logic	Semi-structured Interview Focus Group / ORID Project Diary	Budget tracking Time tracking Questionnaire Dartboard Observation

Source: <http://evaluationtoolbox.net.au/>

Formative evaluation often lends itself to qualitative methods of inquiry. The questions asked in formative evaluation are generally more open and lead to exploration of processes, both from the viewpoint of participants, but also from that of project staff and other stakeholders.

The use of participatory evaluation is particularly relevant and appropriate to formative evaluation. Some of the approaches to consider in undertaking a formative evaluation are briefly outlined in this section.

Summative evaluation looks at the impact of an intervention on the target group. This type of evaluation is arguably what is considered most often as 'evaluation' by project staff and funding bodies- that is, finding out what the project achieved. Summative evaluation can take place during the project implementation, but is most often undertaken at the end of a project. Summative evaluation is often associated with more objective, quantitative methods of data collection. Summative evaluation is linked to the evaluation drivers of accountability. It is recommended to use a balance of both quantitative and qualitative methods in order to get a better understanding of what the project has achieved, and how or why this has occurred. Using qualitative methods of data collection can also provide a good insight into unintended consequences and lessons for improvement. Summative evaluation is outcome-focused more than process focused. It is important to distinguish outcome from output. Summative evaluation is not about stating that three workshops were held, with a total of fifty people attending (outputs), but rather the result of these workshops, such as increased knowledge or increased uptake of EU tools. (outcomes).

TABLE 2 CATEGORIES OF SUMMATIVE EVALUATION:

		Outcome Evaluation	
When	Project implementation and post-project		
Why	To assess whether the project has met its goals, whether there were any unintended consequences, what were the learnings, and how to improve		
Data type	Quantitative	Qualitative	
	Metering	Focus Group	
Examples	Audits or counts	Storytelling / Most Significant Change	
	Questionnaires	Outcome Hierarchy	

Some types of summative evaluation require the collection of baseline data in order to provide a before and after intervention figures. As such, it is important to factor this into the evaluation design.

5. Evaluation process

General framework

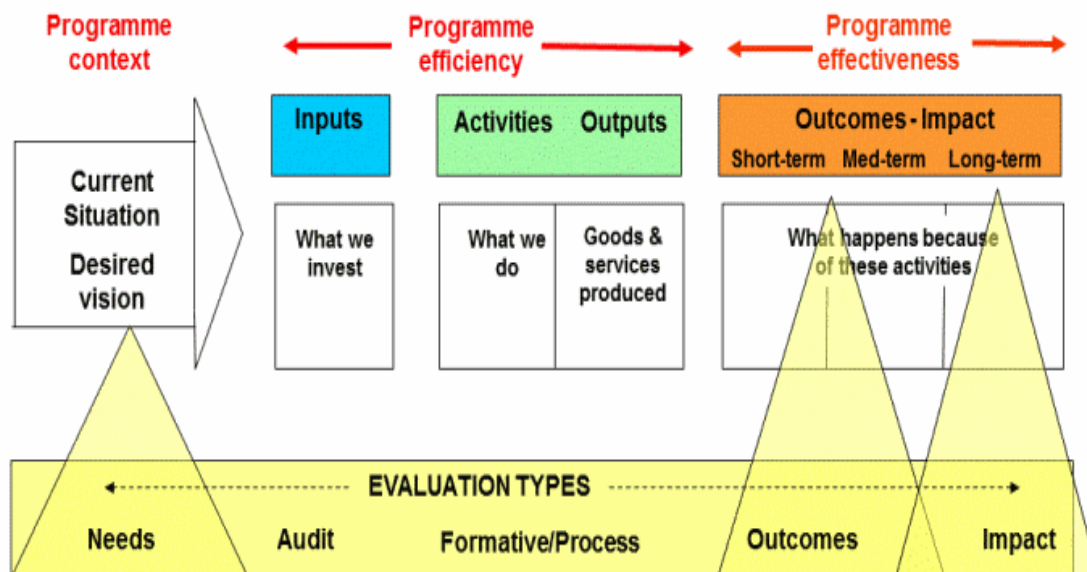
Evaluation of the project will follow the standard logic model used by project managers for evaluation to describe the effectiveness of the project. The model describes logical linkages among project resources, activities, outputs, audiences, and short-, intermediate-, and long-term outcomes related to a specific problem or situation. Once a project has been described in terms of the logic model, critical measures of performance can be identified.

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Scheme 1 Logic model



Source: <http://www.uiweb.uidaho.edu/extension/LogicModel.pdf>

The logic model was characterized initially by program evaluators as a tool for identifying performance measures. The application of the logic model as a planning tool allows precise communication about the purposes of a project, the components of a project, and the sequence of activities and accomplishments. Further, a project originally designed with assessment in mind is much more likely to yield beneficial data, should evaluation be desired.

ILPO 55 evaluation matrix

The main stages in the evaluation process of the ILPO 55 project will follow activities and project phases, where all the deliverables are defined. Each project phase has deliverables – reports, with delivery dates. The role of each partner and time period is foreseen in the simplified Gantt chart of the project in Annex 8. Evaluation will be done at the level of each work package horizontally, contacting each partner individually (Annex 2) and vertically, at the overall level (Annex 1). The project consortium should agree about the indicators summarized at Annex 1. These indicators gather evidence to improve the project and prove its value for stakeholders. Evidence gathering will be in four main fields:

1. Timely delivery of main outputs
2. Coherence of deliverables among them and with the European Policies
3. Interest, participation and level of satisfaction of SH
4. Relevance of ILPO 55 to other sectors

The evaluation plan for this project is addressing two levels: internal and external. The internal evaluation is mainly of the formative type. During the course of the project it is applied on an on-going basis amongst the partners. The main aspects that are subject to the evaluation are the degree of correspondence between project's objectives, the project's results, the project's approach and the project's impact to the target stakeholders. A summative evaluation will be made at the end of the project. The external evaluation will be undertaken by asking the involved stakeholders for their feedback about the project activities they are involved in and about the project impact itself.

6. Evaluation tools

The organization and implementation of the evaluation process could involve several tools and apply them according to the specific objectives. Most data will be gathered from some form of survey technique such as questionnaires, interviews and focus groups.

1. Questionnaires

Questionnaires will follow meetings, seminars, the final conference or other project products and processes. Annex 5 shows the questionnaire which will be used for meetings, seminars and the final conference. The proposal foresees virtual meetings among members. Annex 6 demonstrates the form created to evaluate these meetings. Impact evaluation will be gathered via the questionnaire listed in Annex 3.

2. Interviews

Interviews may be face-to-face, telephone or virtual with stakeholders. Interviews may generate a considerable amount of material and require detailed analysis. Interviews can be used in the phase of dissemination, exploitation and valorisation of project results with representatives of the financial sector, education and training providers, HR organizations, and also trade unions and other relevant stakeholders.

3. Focus groups

Focus groups are good for consensus building. National consultation workshop can benefit from focus group discussions and help to improve the project outputs and outcomes.

4. Documentary review

ILPO 55 has a number of outputs such as the needs and gap analysis, national reports, European report and roadmap, courses curricula, training programs, methods and tools for competence evaluation, piloting reports etc. Peer review is planned for some of the deliverables (Annex 7).

7. Summary

The process of producing a project Evaluation and quality plan is an essential exercise in understanding and focusing the proposed project. The role of the project evaluation planning is mainly devoted to:

- Support the project development by measuring the level of meeting the settled objectives
- Identify the main achievements and monitor their expected impact
- Identify the main areas for improvement
- Support the decision making process

This evaluation plan is based on the logic model and ILPO 55 matrix. Project evaluation process consists of several stages, related to the main objectives, outputs and outcomes of the project.

These stages involve:

- Discussing, prioritising and defining the project objectives and understanding stakeholders
- Evaluation design - selection of evaluation tools
- Collection of data following the objectives of the project and the results that are subject of evaluation
- Analysis and interpretation of the data and results that proves the main achievements and progress
- Report findings in the interim and final reports

8. Annexes

Annex 1 Evaluation matrix

Field	Indicator
Timely delivery of main outputs	1) Respect of deadlines and specifications 2) Partners consultations and participation
Coherence of deliverables among them and with European Policies in E & T	3) Comprehensiveness of the set of deliverables 4) Coherence of main deliverables with European Policies in E & T
Interest, participation and level of satisfaction of SH	5) Number of VET providers and other SH involved in the survey 6) Number of qualifications and training programmes 7) Number of methods and instruments 8) Number of individuals over 55 involved in piloting 9) Number of stakeholders involved in the ILPO55 Reference Framework
Outcomes and impact of ILPO55 within the FSS	10) Number of website visits and downloads 11) Number of stakeholders interested in project's results 12) Number of participants at the final conference
Relevance of ILPO55 to other sectors	13) Provision of information on ILPO55 outcomes to number of stakeholders outside the FSS 14) Number and level of interest from other sectors

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Annex 2 Evaluation of project partners' indicators

Field	Indicator	Deliverable	Planned date of delivery	Actual date of delivery	Quantity and quality measures

Annex 3 Impact evaluation

What were your expectations of this project?
To what extent have these expectations been achieved?
What impact has the project had on your own professional development?
What impact has the project had in your own institution (and beyond)?
Have you encountered any problems in implementing the new Curricula?
To what extent have you been able to contribute to the project developments?
To what extent will you be able to contribute to the ILPO 55 Reference Framework?
Please add any additional comments

Annex 4 Website evaluation

First Impression
The URL is short, simple and intuitive.
The webpage downloads quickly.
Pages are easily readable, clear and easy to understand.
The font size is large enough and the colours are appropriate.
The information on the home page is enough to realise what is the project about.
The site provides access to contact details from the homepage.
Navigation
The navigation system is intuitive and easy to use, providing direct access to various content and facilities on the site.
There is a site map to easily understand the navigation and find fast the right information.
There is a return to Home Page from any page.
There are internal links, allowing navigation through the site following the natural progression of the content.
Navigational links are visible and consistent throughout the complete website.
Content
All the content presented on the website is of the highest quality.
It is clear who is responsible for the site.
There are clear headings to illustrate an outline of the content.
It is clear when the site was created and last updated.
The sources of information and factual data are clearly listed, and available for cross checking.
The website presents the content through the use of text and graphics.
All the content published is recent and up-to-date.
The website provides useful and relevant external links.
Partners Area
It is easy to upload a document on the Partners Area.
It is easy to search and find a document in the repository.
It is logically structured according to the ILPO 55 Project progress.
The documents are always updated with the recent changes.

1. How frequently do you enter the ILPO 55 website?
2. How frequently do you refer to the Partners area?
3. How frequently do you upload documents on the web site?
4. How frequently do you upload documents in the Partners area?
5. What do you think should be included in the website in order to improve its effectiveness?
6. What do you think should be improved in the Partners` Area?
7. What are your recommendations?

Annex 5 Meeting evaluation

1. Was all the important information supplied before the meeting accordingly?
2. Did you achieve the tasks you were supposed to, according to the Project plan, before the meeting?
3. Did the meeting have a logical sequence and appropriate time for all the partners' introductions?
4. Are you satisfied with your contributions to the discussions and decisions taken?
5. Did the meeting address all the issues from the agenda?
6. Were the meeting objectives achieved?
7. Did the partners prove their achievements by demonstrating appropriate results?
8. Were all partners participating and responding to the collaborative project activities?
9. Were all the Project tasks reported on and completed within the requested time frame?
10. Were all important issues clear and solved?
11. Were new ideas discussed and suggested for project implementation?
12. Was the working environment appropriate?
13. Were the accommodation, food and the social element satisfactory?
14. Has the Project team achieved common appreciation about the project approach, objectives and management?
15. Have the Project partners reached the required performance and effective collaboration?
16. Is there a clear and reasonable action plan agreed upon?
17. Do you understand your personal and institutional obligations in the project work?
18. What do you consider to be the main strength of the meeting?
19. What are the weak points to be improved?
20. What are your recommendations for future improvement?

Annex 6 Virtual meeting evaluation

1. What do you consider to be the main strength of the virtual meeting?
2. What should be improved in the virtual meeting?
3. What are your recommendations for the future virtual meetings?
4. What are your recommendations to the management of the virtual meeting?
5. Are you satisfied with the virtual meeting environment?

Annex 7 Peer review

Deliverable is:

Fully accepted	Accepted with reservation	Rejected unless modified as suggested
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Suggested actions:

1. The following changes should be implemented:
2. Specify missing components and subjects:
3. Required changes on deliverable essence and contents:
4. Further relevant required improvements:

General comments:

TOPIC	Reviewer comments
Deliverable layout	
Deliverable contents thoroughness	
Correspondence to project and program objectives	
Particular remarks in format, spelling, etc.:	

Specific comments:

TOPIC	Reviewer comments
Relevance	
Response to the project further steps	
Methodological framework soundness	
Quality of achievements	
Quality of presentation of achievements	

Annex 8 ILPO 55 Simplified Gantt chart with deadlines

Project activity	Deadline
A1 - Organize the Kick Off Meeting	
A2 - Develop the Management and Quality Plan	
A3 - Define bilateral Collaboration Agreements with Partners	
A4 - Design the ILPO55 Brochure	
A5 - Organize virtual Partners' Meetings	
A6 - Conduct operational, administrative and financial management	
O1 - Evaluation Strategy and instruments	
O1 - A1 - Define the Evaluation approach and methods	
O1 - A2 - Develop Evaluation instruments and tools	
O2 - Website	
O2 - A1 - Design graphics and structure	
O2 -A2 - Design and integrate the contents	
O2 - A3 - Promote at national and international level	
O3 - Needs & Gaps Analysis	
O3 - A1 - Develop methodology and instruments	
O3 - A2 - Conduct national surveys	
A7 - Organize the 2nd Partners' Meeting	
O3 - A3 - Organize national interviews	
O3 - A4 - Elaborate the national analysis reports	
O3 - A5 - Design the European Report & Roadmap	
O3 - A6 - EU consultation Seminar	
O4 - Interim Evaluation Report	
O4 - A1 - Collect feedback for evaluating project outputs and activities	
O4 - A2 - Analyse the feedback received and draw conclusions and recommendations	
O4 - A3 - Produce the Interim Evaluation Report	
A8- Design and submit the 1st Interim Report	
A9 - Organize the Interim Partners' Meeting	
A10 - Conduct awareness raising campaigns	
O5 - Courses curricula for ILPO55 Qualifications	
O5 - A1 - Define Adult Trainer & Social Responsibility Facilitator Qualifications	
O5 - A2 - Design of course curricula and assessment standards	
O5 - A3 - Develop blended training programmes	
A11 - Organize the 4th Partners' Meeting	
A12 - Design and Submit the 2nd Interim Report	

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O6 - ILPO55 Reference Framework	
O6 - A1 - Develop methods and tools for competence evaluation	
O6 - A2 - Design methodologies for supporting the professional development	
O6 - A3 - Provide recommendations for acquiring the ILPO55 Qualifications	
O6 - A4 - Analyse Legal and regulatory provisions	
O6 - A5 - European consultation seminar	
A13 - Organize the 2nd Interim Partners' Meeting	
A14- Conduct awareness raising campaigns	
O7 - 2nd Interim Evaluation Report	
O7 - A1 - Collect feedback for evaluating project outputs and activities	
O7 - A2 - Analyse the feedback received and draw conclusions and recommendations	
O7 - A3 - Produce the Interim Evaluation Report	
O8- European Report on the piloting of the ILPO55 Reference Framework and Adult Trainer Qualification	
O8 - A1 - Design the piloting methodology and instruments	
O8 - A2 -Implement national piloting activities	
O8 - A3 - Organize national consultation workshops	
O8 - A4 - Design national piloting reports	
A15 - Organize the 6th Partners' Meeting	
O8 - A5 - Provide the European piloting analysis and recommendations	
O9 - Final Publication of project results	
O9 - A1 - Analyze and select the relevant project results	
O9 - A2 - Produce and disseminate the final publication	
O10- Exploitation and Sustainability Strategy	
O10 - A1 - Define the Intellectual Property Rights Agreement	
O10 - A2 - Plan the Exploitation and Sustainability activities	
O10- A3 - Organize the Final Dissemination Conference	
O11 - Final Evaluation Report	
O11 - A1 - Collect feedback for evaluating project outputs and activities	
O11 - A2 - Analyse the feedback received and draw conclusions and recommendations	
O11 - A3 - Produce the Final Evaluation Report	
A16 - Organize the 7th Partners' Meeting	
A17 - Conduct awareness raising campaigns	
A18 - Design and submit the Final Report	

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