



TRANSNATIONAL PROJECT EVALUATION

EQUAL

VIRTUAL LEARNING SAUNA

TENDER DOCUMENT

Prepared by

People Projects UK Ltd

Dated: June 2004

**Contact: Lee Dickinson
(01924) 276862**

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1.0 INTRODUCTION

People Projects is pleased to be offered the opportunity to tender for the EQUAL Virtual Learning Sauna Transnational. Lisa Morris, will be the lead consultant for this work with the overall project management being undertaken by Lee Dickinson.

People Projects notes with interest the evaluation framework:

Aims and Objectives

The evaluation aims to:

- Gauge the extent the project has been effective within the partner organisations
- Identify how effective the partnerships have been – what has worked and not worked
- Identify (if any) changes in the organisations to the innovative ways of working
- Determine whether the partners understand how to motivate and engage the target groups in the context of lifelong learning
- Identify whether specific solutions have been found to meet user needs requirements
- Identify whether the partners have targeted different learning environments and experiences to help them set up their learning interventions
- Establish how effective the learning ambassador has been as a tool to engage learners
- Identify factors leading to good practice
- Recommendations and improvements within the project

Interim report

- The first interim report should provide an idea of how the Learning Kitchen is performing against the objectives of the transnational co-operation Agreement.

Final Evaluation Report

The final evaluation report will include reference to the following:

- Innovation – an assessment of the final joint products developed as a result of the transnational partnership
- Transnationality – the success of Transnational working and effectiveness of the partner's contributions
- Partnership – overall management and administration of partnership working
- Validity – whether the needs described in the transnational co-operation agreement were met
- Dissemination – whether a wide and appropriate audience was reached
- Valorisation – whether the project achieved multiplier effects through mainstreaming activity at transnational and national levels

2.0 INTERPRETATION OF TENDER

Evaluation is an ongoing process throughout the life of a project, involving the analysis and interpretation of data, structures, management, methodologies and relationships. A “whole model” approach ensures the quality of provision and the success of the project. Through evaluation, individual organisations and partnerships can ensure that their own performance is of the highest possible quality. Evaluation does not merely provide a “sum up” at the end of the project but offers valuable “navigational” support, which allows adjustments to be made during the progress of the project towards its agreed destination or

conclusion. It also provides a summary record of a project's processes and achievements, which will form the basis for future planning and further initiatives. Evaluation not only records "success" but also takes notice of what has not worked, which is of equal learning value, often found to be of greater value by many partners. These guiding principles will be used in developing and delivering the evaluation on behalf of the Learning Virtual Sauna Transnational partnership.

EQUAL projects are funded to test innovative approaches, "test beds" for improving access to vocational training and employment, particularly targeting disadvantaged groups within society. The Learning Virtual Sauna Transnational partnership incorporates all these aspects through its emphasis on improving the quality and access to training and employment, with a particular emphasis on the use of Information Communication Technologies, linked to the developing European Knowledge Society.

Innovation needs to be evidenced through the research being undertaken within this evaluation process, setting baselines for activity within each country before the project has begun, which will then enable the "improvement" and "distance travelled" to be measured. These baselines will also aid the measurement of impact and added value of the project.

The other key requirement of the EQUAL programme is that of transnationality. The evaluation process needs to measure the added value provided by the partnership working together, i.e. what has been achieved through the partnership at each national partnership level as well as at Transnational partner level, which would not have taken place if these partnerships had not come together. The evaluation also needs to take account of each partner's own expectations in regard to the impact of the project. To do this, it will be necessary to identify the relevant baselines, i.e. what each partner was already undertaking in regard to their national project and what each partner's expectations of the results of the project will be. Once these baselines have been determined, it will be possible to measure the added value for each partner and for the whole transnational partnership. The evaluation process also needs to identify if each national partnership is complementary and supportive of the other national clusters of partners, and includes the partners needed to ensure mainstreaming and sustainability beyond the life of the Learning Virtual Sauna Transnational partnership.

3.0 METHODOLOGY

To successfully achieve the objectives specified in the tender, we have identified the following key tasks and methodology (which assume that the time frame provided with the tender specification as included in the application, has been adhered with to). Reference to the transnational project manager refers to the "identified" Learning Kitchen Manager following the initial inception meeting.

Transnational Partnership Development

- To undertake a full analysis of the final transnational co-operation agreement and any relevant development working papers, as well as the finance and contractual arrangements with each partner (**desk research**)
- To ensure there is a full project specification available for all the partners to use within their dissemination activities, a summary, which identifies all the key elements of the transnational project, it's objectives and proposed outputs, targets and timeframe (**desk research**)
- To ensure a full project plan has been developed which identifies key performance indicators, milestones and lead partners for specific tasks (**desk research**)
- Identify what roles and responsibilities each partner has agreed to undertake within the transnational project, what funding has been allocated from the EQUAL programme to recompense for this activity, and each partner's requirement for match funding. Any inequality in the allocation of funding will be identified as part of this process (**desk research/questionnaire/meeting**)

Research (questionnaires/meetings)

- If still within the time scale as stated within the original application, work with the transnational project manager and the partnership to set the specification for the research within the evaluation to ensure commonality of approach, methodology and collection of data, (meeting). Agree with the transnational project manager what data needs to be captured, and how this should be recorded for future use and reference within the project (**meeting**)
- Identify how this data can be used for dissemination and mainstreaming purposes within each national context to engage other key stakeholders not yet formally within the partnership. E.g. awarding bodies, local and regional municipalities and development agencies, lead bodies for qualifications (**meeting**)
- Work with the transnational project manager (**meeting**) to analyse the results of the research undertaken in each country, ensure similar research activity has taken place from which common data across the partnership can be drawn.
- Use findings to assess (in part) the validity for the transnational partnership, this assessment to identify validity within each national context, and at transnational level (**reporting**)

Identification of innovation within the transnational co-operation agreement, and how effective this has been in the delivery

The key elements of this stage of the project evaluation will include:

- **Desk research and meetings** with the transnational project manager and partners as appropriate to identify the innovative aspects of this project. Innovation will be looked at in terms of:
 - ✓ Process
 - ✓ Context
 - ✓ Products
- Ensure each partner understands the concept of innovation, and recognises the innovation within the project as it applies to their national context and at European level (**meeting/interviews**)
- Ensure the innovative aspects of the project are integrated into the dissemination strategy and action plan (**reporting**)
- Link innovation to the added value of the transnational partnership working and activities, and how this could be strengthened through possible trainer and trainee exchanges and placements linked to and supportive of the “innovative” work being undertaken within the pilot project (**reporting**)

Managing the transnational partnership

This stage of the project evaluation would be concerned with:

- Audit and assessment of systems, processes and documentation put into place for monitoring and evaluation as a transnational partnership. This will include assessment of how data is collected, stored and shared across the partnership and used to support both interim and final reports. Investigate the “secretariat” arrangements for the project at each national level as well as for the transnational partnership.

- Assessment of each partner's past experience of working with the Structural Funds programme and/or any other EU programme. (This links to added value of the project and partnership) (**Questionnaire/meetings/face to face interviews**)
- Ensure the dissemination strategy and action plan is in place, has been agreed with each partner, has set targets, performance indicators in order to measure impact of transnational dissemination within the objectives of the transnational co-operation agreement and in regard to mainstreaming (meeting)
- Work with the transnational project manager to use this information to complete the interim/final reports and claims to EQUAL

Evaluation of the impact and added value of the transnational partnership and it's activity

This part of the evaluation will need to include some contact with the transnational partners, and costs as appropriate will need to be covered. It could be achieved within one of the transnational partner meetings but may need a separate meeting with each of the partners. The work will include:

- Identification of how involved each partner was involved in the development of the transnational co-operation agreement
- Identify appropriateness of each partnership at national level in regard to valorisation and mainstreaming, make recommendations.
- Identify each partner's perception and understanding of valorisation and mainstreaming, and how each partner proposes to undertake this within their country
- Identification of initial perceptions of each partner's role and responsibilities within the transnational partnership and reporting arrangements as required by EQUAL. These will act as the base lines for the evaluation. (Interview/questionnaire)
- Assessment at the beginning of the project of each partner's expectation of the anticipated results and how these may benefit them as an individual, their organisation and within the national context of their education, training and employment structures. This will be the baseline for the evaluation. (Interview/questionnaire)
- Assessment of each partner's understanding of the concept of added value, and their perception of added value of the transnational partnership. This will be used as the base line
- To revisit these baselines with each partner just before the interim/final report deadline to show the current understanding, and identify and report/amend any changes to these baselines
- To revisit these baselines with each partner just before the final report deadline to identify understanding at project completion stage, and identify, report/amend changes to these baselines

Added Value within the evaluation process: Valorisation and mainstreaming

- Identify appropriateness of each partnership at each national level in regard to proposed valorisation and mainstreaming of the proposed results and make recommendations for additional partners and associates to be brought in as needed for this purpose. (meeting/interview)
- Identify each partner's perception and understanding of valorisation and mainstreaming, and how each partner proposes to undertake this within their country (meeting/interview)
- Support the partners in producing a valorisation and mainstreaming strategy (desk/meeting)

Production of interim and final reports

Reporting arrangements will be agreed at the inception meeting with the transnational project manager and/or partnership. All reporting will feed into the interim and final reports.

- Agree report specification with the transnational project manager/partnership
- Production of draft interim report, on the basis of activity above and agree with transnational project manager, amend/adapt as required
- Present report findings and recommendations
- Agree final report specification with transnational project manager/partnership
- Production of final draft report, and agree with transnational project manager, amend/adapt as required
- Present report findings and recommendations to transnational partnership

4.0 PROJECT EVALUATION BUDGETS

For the purposes of this project, as no overall project budget has been set within the tender specification, a budget figure has been set against each activity. These figures are negotiable with the contractor when the final specification is agreed during the initial inception meeting. Travel and subsistence is additional to the costs quoted below, and will be recovered on the basis of actual costs incurred as agreed with the transnational project manager.

	Staff	Duration	Cost £
Project set up/inception meeting/analysis of information and documentation	Lisa Morris	1 days	700.00
Analysis/evaluation of research methodology and feedback, mapping of common aims and objectives, identification of proposed results/outputs and production of transnational project specification	Lisa Morris	2 days	700.00

Identification of innovation/piloting products and feedback. This includes the following: <ul style="list-style-type: none"> • Development of questionnaires • Identification of roles and responsibilities • Identification of initial expectations • Understanding of innovation • Key learning points to date • Key messages to policy makers • What has been achieved • Identification of joint products/activities • What has not been achieved • Identification of unexpected outcomes 	Lisa Morris	5 days	1,750.00
Evaluation of transnational project management/monitoring/impact assessment/mapping against objectives (meetings and questionnaires)	Lisa Morris	2 days	1,750.00
Evaluation of transnational partnership (added value - meetings and questionnaires)	Lisa Morris	5 days	1,750.00
Production of Interim/final reports and feedback	Lisa Morris	6 days	2,100.00

Project Budget

Consultancy Time	£7350.00	21 days @ £350.00 per day
Project Management	£1500.00	10 days @ £150.00 per day
Administrative Support	£ 950.00	
TOTAL	£9800.00	exclusive of VAT

SPECIAL CAVEAT

We would like to point out that the work identified in the table above would be a purely paperwork exercise and would not include any participation in transnational meetings. We would strongly recommend that a visit to the Portugal partner should be included, as they will be completing shortly. Also attendance at a minimum of one transnational meeting at which we would organise and facilitate a one day workshop. Due to language issues a whole day would be required.

The cost of this additional work would be:

Consultancy Time	£3150.00	9 days @ £350.00 per day
Project Management	£ 600.00	4 days @ £150.00 per day
Administrative Support	£ 300.00	
Expenses to include: travel		
Accommodation, subsistence	£ 900.00	
TOTAL	£4950.00	exclusive of VAT

This work could be commissioned under a separate contract if required and is still open for discussion

5.0 CAPABILITY STATEMENT

People Projects has a robust knowledge of the EQUAL programme and it's requirements of innovation and transnationality as well as:

- ✓ Substantial experience in education and training,

- ✓ Experience of the inspection of education and training provision and the impact of Leonardo da Vinci on inspection grades).
- ✓ Extensive experience of working with transnational partners from across Europe in the development of joint curricula, joint training materials and common accreditation processes

The organisational processes of **People Projects** provide a robust administrative and support model. The processes referred to also include formal monitoring, review and evaluation. **People Projects** has a successful record of undertaking this type of work, and through the experience of Lisa Morris a thorough understanding from the practical experience of not only evaluating EQUAL but also delivering both transnational pilot and mobility projects through programmes such as INTEGRA, YOUTHSTART, HORIZON, NOW, ADAPT and Leonardo da Vinci, Socrates and Youth.

Lisa Morris has 15 years experience of working in local government in finance, education, social services, economic development and education & training departments, followed by 14 years experience of working as an International Projects Manager in further education.

Her career in the last 20 years has focused on European policy and advocacy including attracting over £40million grant aid from the European Union and UK funding programmes. Lisa has worked as a consultant for local government, Training & Enterprise Councils, private companies, voluntary organisations, Higher Education, Further Education and schools, and has considerable experience of working in many of the EU member states. Her work to date has included:

- **Design and implementation of a range of education, training and employment programmes particularly targeting excluded communities including:**
 - ✓ Sheltered employment projects for people with learning disabilities across North Yorkshire,
 - ✓ Women's Technology Centre in Leeds for unemployed women, Asian women's projects, women into business programmes
 - ✓ A range of provision for long term unemployed adults (homeless, recovering from substance abuse, ex offenders, , including community based activities in partnership with voluntary organisations
 - ✓ In the last 4 years a multi-agency partnership project offering an alternative work based curriculum to 14-16 year olds in danger of falling out of education
 - ✓ A range of provision for refugees and asylum seekers with permission to work delivered by 26 organisations from the public, private and voluntary sectors in West Yorkshire. This network has now been extended to 46 organisations and Lisa has been successful in obtaining further funding for the network through ESF C0-financing.
 - ✓ ICT skills for SMEs
 - ✓ E-learning for disadvantaged communities

All these projects were co-financed through the European Social Fund [ESF Objective 3, ADAPT, INTEGRA, HORIZON, NOW, YOUTHSTART] and UK funding programmes including Yorkshire Forward's Single Pot.

- **Leonardo da Vinci programme**
 - ✓ Pilot project: Design, development and implementation of a transnational training programme for "Animateurs" in the Hotel & Leisure sector, achieving pan European recognition of the qualification.
 - ✓ Nine years of successful applications under the mobility strand of Leonardo da Vinci enabling young people and adults from the formal and informal education systems undertake both short term and long term placements in 17 different countries across Europe. (Previously 5 years experience under PETRA and the Young Workers Programme)
 - ✓ Development of an accredited work placement module for trainees and trainers undertaking mobility formally recognising the value of mobility placements for the beneficiary.
 - ✓ External evaluation of the pilot project "Europass and Europathways" which integrates mobility within vocational education and training systems and links mobility to regional development.
 - ✓ External Assessment of mobility applications on behalf of the UK Leonardo da Vinci national agency.
 - ✓ Support for the new member states in developing mobility and pilot programmes undertaking training and support in Poland, Estonia, Malta and Turkey on behalf of the British Council
 - ✓ PETRA - Design, development and implementation of a transnational guide of good practice with 7

other EU partners for overseas work placements and exchanges still being used by partners across Europe under the Leonardo da Vinci mobility programme.

Examples of Recent/Current Consultancy Contracts

- West Yorkshire Global Grants Programme
- West Yorkshire Refugee programme (co-financing/Leeds employer coalition)
- Supporting the Hungarian National Office for EQUAL
- Advisory work with VET organisations in Turkey in regard to Leonardo da Vinci
- Advisory work for British Council central and Eastern European Education Officers on Leonardo da Vinci/VET/EU programmes
- Connexions ESF Objective 3 applications
- Objective 2 ERDF applications for business support, The Fair Play Foundation and the Back to Work Company
- Objective 2 evaluation for GOYH
- Evaluation of Leonardo da Vinci pilot project for the Ministry of Education in the Balearic Isles
- Evaluation of a national EQUAL project in the Retail sector, The Retail Network
- Evaluation of the EQUAL Black Country Learning Kitchen
- Article 6 application for Older Workers
- Evaluation of the West Yorkshire Refugee Network Round 4 co-financing project
- Training and staff development for a range of organisations including through Network Training

References

1. Carmen Valdueza,
Govern de les Illes Balears
Conselleria d'Educacio i Cultura
Direccio de Formacio Professional i Inspeccio Educativa
Department de Formaccio Professional
Passage particular Guillem de Torrella
07002 Majorca
Spain

2. Cathy Parker,
The Retail Network
Manchester Metropolitan University
The Business School
Aytoun Street
Manchester
M1 3GH

6.0 Quality Assurance

A formal project management approach would be used, with a time tabled action plan produced with the project manager; identifying the various stages of the project (Critical Path Analysis), which would include a reporting schedule linked to each stage. The activities in each stage will be clearly defined as tasks, with time-bound milestone targets, in line with the agreed objectives. In addition to this formal project management process, **People Projects** uses a system of peer review. This ensures that other members of the team and/or associates examine the work undertaken by one member of the team. The results of this review process provide direct feedback to the person who will undertake the work, and the corrective direction, if this is required.

7.0 Equality of Opportunity

People Projects Equal Opportunities Policy

This policy gives expression to one of the organisation's core values, namely that people are employed on the basis of their ability and experience, or perceived potential, and are appraised on their ability to achieve agreed targets and maintain the standards of work required, and on their ability to maintain effective working relationships with their co-workers.

"The mission of People Projects is to deliver services which exceed customer expectations".

It will achieve this through sound commercial management and by ensuring that current and potential associates get equal and fair treatment based on merit. Their treatment should not be based on their age, colour, ethnic or national origin, nationality, race, religious belief, gender, marital status, sexuality, responsibility of dependants, disability, trade union or political activity.

Putting equal opportunities into action

People Projects will include these key strategies in its role as an equal opportunities employer.

1. Developing a high-quality workforce through an Investment in People Strategy.
2. Running and Monitoring a fair and open **Recruitment and Selection Policy**.
3. Introducing and running **Family Friendly Policies**, including birth, maternity and adoption leave, domestic leave for caring for sick dependants, job-share, career breaks and study leave, and so on.
4. Operating a **Sexual Harassment Policy** for the protection of associates at work.
5. Protecting associates in line with national legislation including:
 - **Sex Discrimination Act 1975**
 - **Race Relations Act 1976**
 - **Disability Discrimination Act 1995**
 - **Equal Pay Act 1970**
 - **Human Rights Act 1998**
 - **Race Relations (amendment) Bill 1999**