



**Care workers in the European Union  
Project number DE/13/LLP-LdV/TOI/147634**

**External evaluation paper**

Description	Evaluation: work of the partners in the first year
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## **Foreword**

This document is the external evaluator final paper for the CATE project. It has been produced in the context of the coaching process of the first year for which I, as an expert of ECVET Europe are responsible. It deals with both product and process evaluation. In particular, it considers the impact and quality of produced results and the way outcomes were produced. Sustainability and transferability of results are considered as well. As for the evaluation, this was elaborated taking into account the terms of reference from approved application form.

### **1. Characteristics of evaluation.**

In CATE, evaluation has a twofold perspective: internal and external evaluation.

Internal evaluation - which is a combination of monitoring and evaluation - considers evaluation as a process finalised to understand to what extent project aims were fulfilled and if the transnational cooperation within the partnership was effective. This means that the objects to be evaluated internally are:

- ✓ the defined objectives
- ✓ the transnational project meetings
- ✓ the cooperation and communication between meetings
- ✓ the project coordination
- ✓ progress made towards the aims of the project.

Internal project evaluation takes into account the general objectives of the project and in detail the quality criteria established prior to each work package by the coordinating partner of each work package. The tools for the process assessments have been:

- ✓ questionnaires among partners after project meetings
- ✓ questionnaires among partners after the work packages/result is accomplished.

As for the distinction between internal and external evaluation, according to the application form, the internal evaluation and monitoring enables an appropriate management of activities and it is functional to achieve phase objectives, to comply with the project timetable, to account the expenses. Thereby the applicant and the projectmanagement have designed a suitable monitoring and evaluation plan which includes indicators and procedures.

The external evaluation is designed to assess the relevance, the efficiency, the sustainability, the innovation and the transferability of the project. So, the aim is to review the real project results if compared with the planned and expected ones.

### **2. General aims of evaluation.**

Having this in mind, from a general point of view, the evaluation aims are the following:

- ✓ to have an ex post validation of the project methodology and strategy. This validation will be based on achievement of the project results (information that can be derived reading monitoring data) and on the measurement of long and medium term impact of the project activities, results/ tangible outcomes;

- ✓ to check that project results meet the requirements considered relevant, to reach the major objectives as mentioned in the project plan;
- ✓ to enable and enhance horizontal and vertical mainstreaming, providing useful suggestions and guidelines on the vocational training policies for formal, non- and informal- learning. To reach the aim of mobility in the care sector for the member countries national and regional competent institutions and for European bodies.

## **2.1 Evaluation questions.**

The evaluation questions are focused on the following topics and the answers can be found at the end of this document :

1. **relevance**: are project outcomes relevant with reference to the Lifelong learning Programme objectives ? Are results able to create benefits for end users ?;
2. **efficiency**: have tasks been divided amongst partners in a balanced and efficient way ?;
3. **sustainability**: are the network itself or the outputs going to promote mobility in the care sector ?;
4. **transferability**: are the methodology and project best practices easy to be transferred in different context/regions/countries/sectors, and what are the adaptations possibly required ?;
5. **innovation**: to what extent project results contribute at innovating the state of the art on the subjects tackled by the project ?;
6. **impact**: to what extent project results will be used by end users and by regional, national and sectoral competent bodies/partners/institutes
7. **transnational cooperation**: to what extent are the outcomes a result of common activities ?; are they shared by the Partners ?; can they influence mobility policies or the acquisition of professional profiles in different countries ?”.

This evaluation paper is based on the output coming from the project, from participation to project meetings, and from results contained in the project website and information I received from the partners during the project process.

## **3. Project background.**

The overall objective of Cate project:

In Europe we are confronted with the ageing of the people. Whether they want to live at home or decide to stay at nursing homes, they need intense (health) care. To provide more care, Europe needs more qualified care workers. By the end of 2020 Europe expects a striking lack competent care workers. Especially in Germany/Bavaria and Finland this need is already now very high. Bavaria has, so says the Federal Employment Agency, a lack of 10.000 workers in social and health care. In Finland, according the ministry of employment, they expect a lack from 20.000 to 59.000 care workers until 2025.

The project stimulate the possibility for care workers in Europe to find a job in Bavaria or in Finland. In the partner countries DK and NL there is a surplus of care workers. Youth unemployment in ES is a great challenge. The project outcomes will provide transparency in the participating countries by formulating learning outcomes for care workers. It is particularly useful in times of high unemployment and economic crisis. The project also

improves and increases employment mobility in Europe. Cate partners developed a unit of common learning outcomes that covers a part of the qualification files of the vocational courses which the partner countries offer. This unit will be built on the method of ECVET, EQF. Based on the learning outcomes the project group in cooperation with the work field CATE partners created an European profile for workers in elderly care. This European profile simplify and secure the overview of skills and competences needed in elderly care in the partner countries.

They outcomes the CARE partners worked on:

- The creation of an European profile for care workers in elderly care and services together with the work field and centres of expertise. The profile is described in learning outcomes.
- The European profile is validated on EQF level by involving the national bodies of the partner countries (e.g. Calibris for the Netherlands). Stakeholders are participated at a Memorandum of Understanding.
- A matrix to compare the European profile with the national qualifications of the partner countries.
- A procedure for an intake assessment to measure formal, non-formal and informal learning of care workers.
- A procedure for an assessment to validate the differences between the level of the care worker and the level of the European profile.
- Pilot results of the assessment on European level.
- Partners shared the results of the project with their own national bodies:

The consortium included traditional VET schools and training/advising institutes, Centres of Expertise and care institutions brought in several complementary skills. VHS Mainburg has chosen its partners based on experience and expertise (educational, organisational), networking capacity, specific competences and the possibilities for dissemination and exploitation of the project outcomes. Most partners were also well experienced in working within EU-projects.

#### **4. Produced outcomes/results.**

Having summed up the evaluation design and the project background, let us consider project outcomes at the end of the project lifecycle. I distinguish here two typologies of results: structural and content outcomes/ results.

- Structural ones are those outcomes/results that make possible the project functioning: organisational mechanisms, design and preparation of operative tools, adoption of procedures, agreement on tasks, articulation of communication and evaluation strategies,...
- Content outcomes/results are those outcomes produced during project activities and through which project objectives are met. Contents outcomes/results are: a logo for CATE, the profile of European care worker, a memorandum of understanding, the guidelines for assessment, intake assessment guidelines, assessment guidelines (for EU matrix), national profiles on care workers, a matrix for EU care workers, information and dissemination materials.

##### **a. Structural outcomes/results.**

The structuration of the partnership was the first important structural result. The kick of meeting was dedicated to settle down partnership's organisational and functioning mechanisms. After this kick-off meeting in Zwolle, the partnership found agreement on the

following procedures: administrative issues, web functionalities and feeding, monitoring and evaluation, schedules and milestones. More in detail, all proposed outcomes/results were analysed, identifying for each of them the responsible partner, activities to be done, expected outputs and contributions from all partners. Following previous experiences of some of the partners, it was decided that the main tool for communication among partners would be a workplace with protected access, usable for discussion, files and documents management, and to work at a distance between the meetings (also via the organisation of on-line meetings). Moreover, a web page on the project is accessible as the CATE web site.

Partners found agreement on the outputs to produce:

- ✓ the creation of a network of competent bodies who were involved in the project, with the aim to stimulate and support mobility of care workers;
- ✓ the realisation of an European profile of the care worker;
- ✓ the institution of recognition, validation and accumulation of this common profile and matrix ;
- ✓ the realisation of training for those involved in this mobility process;
- ✓ the updating of an existing matrix or care workers in the EU ,
- ✓ the realisation of workshops and pilots to test trainees in the use of the profile and the matrix in international mobility;
- ✓ a comprehensive pilot test phase for the profile;
- ✓ country dissemination plans and project general plan.

During the kick off meeting, the quality securing policy was analysed. The double level of evaluation (internal and external) was agreed upon.

### ***b. Content outcomes/results.***

#### **🚧 Project identity and logo.**

The project logo was developed long before the kick-off meeting; this suggests the idea of continuity. Project identity is created through the realisation of the need among the partners, which is contained in the web site, in the leaflet and is developed during project meetings and all communication events.

#### **🚧 The profile of European care worker, a memorandum of understanding, the guidelines for assessment, intake assessment guidelines and the assessment guidelines (for EU matrix) can be seen as a congruent system.**

All are based on the EQF as during the kick-off meeting the partners were trained and coached by the European expert EQF/ECVET. They agreed on common understanding of the level descriptions. Calibris received they assignment to develop an EQF proof profile for care workers as a common base for the dialogue within the project.

The outcomes of this development work is discussed during the second and the third partner meetings before established a memorandum of understanding which led to the conceptual matrix of the care workers profile.

That matrix is about agreements and checklist to label a qualified care in the partner countries. It is based on the EQF and divided in ECVET units. Those ECVET units are described within the guidelines of ECVET team Europe. The partners had to make compromises in the distinguishing the levels because of national regulations/restrictions. That is why there is a difference in level descriptors between some of the countries which can be seen back in the matrix. As far as I can observe the described units my only remark is that the learning outcomes are not 100% outcome based described but in this case far

enough! This because the outcomes are more related to the formal learning way which is in the care taking profession more common than in other sectors. All outcomes are translated in the languages of the partners countries, (and even more) which makes the outcomes accessible and easy to understand/ use.

✚ **Partner/Country dissemination plans.** Partners produced a dissemination plan. It contains the relevance of the project for partners and investigates why the project is important, which are the obstacles for implementation, which are the measures taken to overcome these obstacles and the self-perception as a care worker. It also contains the dissemination strategies of the partners. This part describes target groups, aims, activities and expected impact. A part is containing the real outcomes of the project in the focus of the target groups, providing recommendations for users groups of the project outcomes. Nevertheless, it is important to consider some points that the plan brought out. To begin with, there is wide variety in the self-perception of partners in the role of the care taker, they contextual context can be diverse. This could lead to discrepancies in the content and characteristics of profile in partner countries. Clarification on this point was made during partners meetings which led to the matrix, but it is a relevant topic to be considered when enlarging the network of countries which are intend to use the profile and the matrix.

✚ **Creation of the network** to support the organisation of the mobility of care workers. At first, all partner are organisations themselves, as this seemed the most practical solution to start up the network. The system should have been enlarged during project it selves, during meetings were stakeholders and key actors were involved.

#### ✚ **Pilot phases of the CATE project**

The test phase had the aim to test and strengthen the profile and matrix portal. Therefore the pilots involved some of the potential users of the profile and the matrix and tested some components of the system. Through delivering questionnaires the following potential users were involved: students / trainees, training agencies / schools, companies. Questionnaires showed some differences depending on the typology of respondents: however, they questioned aspects referring to the usability of the portal, to the usefulness of information contained therein, to the clarity of information and to the support that the profile provides for those who are mobility seekers or who can offer placements.

The pilot phase for the products as a whole (i.e. the applicability of the materials) will take place in the second year.

## **5. Appreciation of participants**

All partners meetings have been analysed to check the appreciation of participants. To do that, an appreciation questionnaire has been delivered by **?????** (responsible for this results), who also elaborated the results.

In all cases appreciation was high and almost all issues obtained very good comments. Moreover, it has to be noted that for almost all items the appreciation was growing from the first to the last meeting, as the tasks in the cooperation between partners was ok and the workloads were correctly balanced.

In detail, meetings' objectives were met according to a vast majority of participants. However in my observation the clarification of tasks and roles of the work Calibris could have been better. It seems to me that they had a primarily task in this project.

The quality of work methods and the quality of working materials were much appreciated. As for the transnational cooperation during the meeting, there was a growing appreciation from the first to the last meeting. Accommodation related aspects were normally ok. Organisation related topics testify the good cooperation between the lead partner and all partners who organised the meetings.

## **6. Evaluation questions.**

Having commented the project implementation by analysing outcomes/results produced so far and considered the appreciation of partners for meetings and their outcomes, I will answer the evaluation questions.

1. **relevance:** are project outcomes relevant with reference to the Lifelong learning Programme objectives ? Are results able to create benefits for end users ?

All project outcomes are perfectly consistent with some of the Lifelong Learning Programme objective, as the promotion of learning mobility is central for the LLP. In particular, it must be underlined partners' concern to secure quality of the purpose of the aim of mobility need in the care sector. Several outcomes/results push towards that direction: the professional EQF based profile, the matrix, the quality charter for institutes, and the manual. Moreover, the network of local partners and the platform for linking students/workers, VET institutions and companies show that the project has produced something really relevant and useful for supporting mobility of students and workers in the care sector. Benefits for end users will consist in the quality outcomes related to mobility services delivered at the end of the project.

2. **efficiency:** have tasks been divided amongst partners in a balanced and efficient way ?;

The original planning showed to be corrected, as workloads were efficiently fixed between partners and all outcomes were produced. In my observation no one among partner behaved as a silent partner. In other words, all partners have accomplished their tasks in most cases according to plans, though sometimes with minor delays. This testifies the commitment of partners, but also the right distribution of the workload, that was balanced and consistent with partners' competences. The mutual trust between partners is doubtlessly consolidated. Efficiency in managing the network is a sort of pre-condition for sustainability.

3. **sustainability**: are the network itself or the outputs going to survive the project period?;

The strategy contained in a working plan and in the dissemination plans envisage long term effects. Referring to this, the CATE partnership has operated to develop effective instruments to communicate outcomes and results to secure quality to services and placements and to maintain and enlarge the network. Partners explicitly committed in keeping the network alive and functioning, as stated during the whole project process.

4. **transferability**: are the methodology and project best practices easy to be transferred in different context/regions/countries/sectors, and what are the adaptations possibly required ?;

The dissemination plan articulation and the level of standardisation of profile, the matrix and units of L.O. make clear that the CATE approach can be transferred without great needs for adaptation to other territorial contexts and even other sectors. All outcomes can be found on the web site of the project and are easy accessible in a different context

5. **innovation**: to what extent project results contribute at innovating the state of the art on the subjects tackled by the project ?;

Considering final results, innovation seems mostly linked to the transversal dimension of the use of EQF and ECVET units combined with the matrix. Referring to this, final outcomes definitely have a good potential to change and improve the access to work/training placements abroad thanks to the emphasis of the profile, the ECVET units and the matrix.

6. **impact**: to what extent project results will be used by end users and by regional, national and sectoral competent bodies ?;

As it is evident from what stated in the previous pages, 24 months of project implementation have produced good results, whose impact is beginning to be visible now, both on users and on partners. Thanks to the accurate definition of the dissemination plans, and the precise work on the profile, units and the matrix, final results are now operative and available to be used by end users and by regional, national and sectoral authorities in the care sector. The outcomes can contribute to the solution of the unemployment problem in the care takers sector in some of the partner countries.

7. **transnational cooperation**: to what extent are the products a result of common activities ?; can they influence mobility policies or the acquisition of professional profiles in different countries ?”.

The accurate planning of work packages, the intentional workload balance contained in the application project, the rational coordination of lead partner, the active participation and commitment of all partners secured that outcomes/results produced during the project are really the result of common efforts. The care taker profile was an expected result of transnational cooperation, which can contribute to the mobility in the employability in the care taking sector.

## **7. Conclusions.**

The final conclusions of this paper are based on 8 elements of reflection that are drawn from the analysis carried out in the previous pages.

### **1. Quality elements.**

The investigation on the project progress and result production brought out some quality elements. Project management was realised in a rational way, that took into consideration all project components, cares for tasks' accomplishment and checks for gaps and delays in actions' implementation. This secured the substantial respect of major milestones and the production of interim results in due time. According to the what I observed, all partners were satisfied with the way project was implemented and managed. Shown, structured German leadership was the basis of this process.

### **2. Clarity in tasks and perspectives.**

The proficient inception phase and the coordination efforts undertaken by the lead partner made clear tasks, milestones and deadlines, as highlighted by partners' reactions and opinions after all meetings. This secured an even and effective progress to project actions and the visibility of project results. Awareness of tasks secured the implementation process to be realised on time. In general partners seems to be satisfied with their contribution to project implementation and were trustful that all were committed in meeting project objectives.

### **3. Clear identification of risks and possible measures to tackle them.**

The exercise realised by partners with the implementation of the European instruments EQF and ECVET allowed all participants to see clearly potential factors for success, potential risks, external conditions for success, and measures to be taken. This created convincing awareness on what to do and what to avoid. It also 'Presencing' new questions and insight in mental models of the past which was asking for dialogue instead of discussion. This makes explicit that management approach of the project was correct and management choices fit the needs.

**4. Well balanced work programme.** The absence of silent partners testifies that the original planning was well done and that partners are all committed in meeting project objectives. Moreover, management proved to be effective, by adopting consolidated management practices and adapting them to implementation actual conditions. There was in my observation no need for a radical change in project tasks and responsibilities.

**5. Clear consistency with LDV objectives and priorities.** The activities carried out in the project and the results produced are coherent with the Leonardo da Vinci operative objectives aiming at the improvement and implementation of European instruments like EQF and ECVET to improve the quality of mobility and of the cooperation between training institutions. Moreover, they are consistent with the LLL European Priority aiming at the implementation of European instruments for mobility strategies in VET. From a broader perspective, Cate-project has produced concrete contributions to the European policies linked to lifelong learning, learning mobility and the relationships between the VET environment and the business community.

**6. Substantial respect of schedules.** Planned milestones and tasks' deadlines have been realised and all partners accomplished their tasks, with tolerable minor exceptions. The project, therefore, realised all planned actions and outputs.

**7. Mutual trust between partners.** The active cooperation and the commitment from all partners secured respect between partners and trust to reach the project aims. The sharing of responsibilities between partners, the relative autonomy to work on the results, to organise work - of course within the context of the project framework - have stimulated the sense of responsibility in all and created a very positive atmosphere.

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