

Women in SMEs

Validating non-formal and informal learning of family SME managers

2013-1-CH1-LEO05-00881

Interim External Evaluation Report

FRAUEN IN KMU
FEMMES DANS LES PME
WOMEN IN SME



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This project has been funded with support from the European Commission. This publication [communication] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

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September 2014

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1.0 Introduction and Background

1.1 Introduction

Scope of Work for the External QA Expert

Review and compare the project baseline with current plans, outputs and reports from QA perspective:

- Provide periodic QA reports to the project partners with recommendations for reducing any negative variance from plans and improving the final quality and relevance of the project's outputs.
- Provide constructive feedback (formative input) through the QA plans and reports to improve communication and collaboration among the partners and diverse set of targeted beneficiaries.
- Raise awareness through the QA plans and reports for the need for each partner to investigate thoroughly their national context while adding value through transnational activities, and encourage innovative approaches to challenges being investigated.
- Production of deliverable 17: interim external evaluation report.
- Production of deliverable 18: final external evaluation report.
- Assist the WP5 QA leader in preparing the WP5-deliverables.
- Participate in two partner meetings as the external QA expert.
- Provide an "audit certificate on the final financial report".

The two deliverables focus on the initial project plan, including the work programme and its deliverables. QA needs to be structured and objective from the start in order to help the project itself stay on top of its premises as well as prepared for the evaluation by the European Commission at the end of the project. The assessment criteria the European Commission will use to assess the final report are:

1. Objectives, results and products
 - a. 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?
2. Coherence between work programme and activities carried out to date
 - b. 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?
3. Partnership
 - c. Are there clear indications of a real and effective partnership?
 - d. Are there significant changes in the partnership when compared with the application?
 - e. If so, are such changes justified?
4. Management
 - f. How was the project managed?
 - g. Have any variation from original plans been adequately justified?
5. Financial management
 - h. Is the expenditure appropriate and in line with the approved Work programme?
 - i. Is the expenditure appropriate and in line with the project's activities as described in the Final Report?

- j. Is the expenditure in line with the level of project's implementation ("best value for money" principle)?
- 6. Evaluation and/or quality assurance
 - k. How well was the project's strategy for evaluation implemented?
 - l. Were there significant changes compared to the original application?
- 7. Dissemination
 - m. How effectively did the project carry out its plan for dissemination?
 - n. What is the quality of the dissemination activities?

These criteria form the basis for the external report (QA assessment and evaluation).

1.2 Project description

The project **aims** to transfer, adapt and pilot an innovative process for validating/certifying the management competences acquired by spouses in non-formal (e.g. in-company training) or informal (through life & work experience) settings. A validation process has been developed by the Swiss Union of Crafts and Small and Medium Sized Enterprises (SGV) resulting in a nationally recognised diploma in the management of SMEs with a specialisation in the management of family SMEs (Federal Professional Education and Training Diploma) specifically designed to meet the needs of spouses of family SME owners. The qualification profile, validation self-assessment tool and applicant support system will be transferred to partner countries of FR, NL and SI, who will adapt and test the Swiss process in their national/local context. The validation process will be piloted with 5 spouses in each partner country.

The consortium will also identify best practice in supporting the individual seeking validation and in the assessment of learning outcomes, which will be integrated into the project's validation process. A transnational workshop will be run for 2 counsellors from each partner country to share good practice and be trained in the project's validation process.

Impact:

- 1) Spouses: recognition/validation of management competences,
- 2) SMEs: better qualified staff, greater sustainability,
- 3) Validation practitioners: improving practices at local/national/EU levels,
- 4) Reciprocal effect: improvement of Swiss method through European testing.

1.3 Leonardo da Vinci Programme

Leonardo da Vinci focuses on vocational education and training, other than at tertiary level. It addresses both the learning and teaching needs in the sector, and is therefore aimed at all parties involved, namely trainees in vocational education, teachers and trainers, institutions and educational bodies, enterprises, associations, social partners and bodies relating to either lifelong learning or the labour market.

1.4 Establishing Project Needs

Family businesses make up more than 60% of all European companies, and they account for about 40% to 50% of employment, encompassing a vast range of firms of different sizes and from different sectors, mostly SMEs (small and medium sized enterprises). Family SMEs have a significant role to play in the strength and dynamism of the European economy with over 1 trillion EUR in aggregated turnover, 9% of the European Union's GDP, more than 5 million jobs.

Family SMEs are often set up by a couple and the spouse takes a major role in the management of the SME as well as having a strong personal and financial stake in the company. These knowledge, skills and wider competences are often acquired outside formal education and training institutions and therefore not recognised and valued. This creates a vulnerability at both the personal and company level (divorce, illness, bereavement, or financial difficulties and bankruptcy).

1.5 Project Aims & Objectives

Explanation of the goals and mission of the project:

The project's core aim is to improve the transparency and recognition of qualifications and competences of spouses managing family SMEs, in particular those acquired through non-formal and informal learning, in order to get their high level of professional qualification recognised:

- provide tailor-made support and counselling in the validation process taking into account the constraints of company managers with family responsibilities;
- support development of self-efficacy, gaining confidence and greater performance at work;
- equip VET trainers/counsellors with innovative, engaging, tailored support method and tools informed by Swiss & European best practice;
- promote concept of validation and increase VAE opportunities at higher VET level and for larger groups of beneficiaries, in particular private sector workers;
- promote validation and recognition of work experience and competencies into existing national/regional qualification and accreditation systems with the support of competent bodies;
- encourage a pan-European recognition of the knowledge, skills and competences of family SME managers.

As a result of taking part in the project, the following changes for the target group (identified in needs analysis) will occur:

1. Spouses will be equipped with tailor-made validation accompaniment method and tools enabling them to optimise their time, facilitate the preparation of the validation portfolio, and to avoid drop-out by taking into account their specific needs and constraints;
2. Greater numbers of family SME managers will have access to validation making visible their knowledge, skills and wider competencies;
3. VET trainers/counsellors and other validation stakeholders will have access to an innovative method and tools to better support individuals seeking validation. A transnational workshop will be run for 2 counsellors from each partner country (FR, NL, SI) to share good practice and be trained in the project's validation process, thus having the opportunity to develop their own skills and approaches of organisations in their countries.

Outcomes can include:

- better visibility and recognition of learning outcomes;
- value given to an unrecognised profession;
- professionalisation of the management of family SMEs;
- partial or full accreditation in national VET systems;
- Cultural adaptation of validation method and tools, pilots in 4 countries, 6 European counsellors trained by Swiss coaching expert PotentialYse, 20 spouses qualified.

For all objectives practical examples and role-models are achieved/delivered/made available.

1.6 The Project Partners

		Name	Specific expertise
P0	CH	Schweizerischer Gewerbeverband	Ensure wide and effective dissemination of the results of the project and contribute to its sustainability.
P1	CH	Pillet & Partners	<p>Pillet & Partners will co-manage project with applicant P0-SGV</p> <p>WP1 - Manage the overall coordination of the project, including collaborating with partners in order to submit internal financial and activity reports as well as interim and final reports to funding body</p> <p>WP1 - Attend 4 partner meetings (CH, FR, NL, SI)</p> <p>WP1 - Organise meeting 1 (CH)</p> <p>WP1 - Attend monthly skype meetings with P0</p> <p>WP1 - Attend 5 project management meetings with P0</p> <p>WP2 - Deliver desk research + report on existing methods for supporting applicants throughout the validation process at national level</p> <p>WP2 - Contribute to focus group looking at needs of spouses</p> <p>WP3 - Contribute to national report on conditions for implementing VAE for spouses</p> <p>WP4 - Contribute to evaluation of pilot</p> <p>WP5 - Attend 3 national stakeholders' group meetings + contribute to quality management</p> <p>WP6 - Lead on WP6 -Dissemination & Exploitation + contribute to activities</p>
P2	CH	PotentialYse	<p>PotentialYse will:</p> <p>WP1 - Contribute to internal financial and activity reports as well as interim and final reports to funding body</p> <p>WP1 - Attend 4 partner meetings (CH, FR, NL, SI)</p> <p>WP2 - Contribute to desk research + report on existing methods for supporting applicants throughout the validation process at national level</p> <p>WP2 - Organise 1 focus group looking at needs of spouses</p> <p>WP3 - Contribute to introduce validation method and tools developed in CH</p> <p>WP3 - Contribute to national report on conditions for implementing VAE for spouses + practices in assessing VAE portfolios</p> <p>WP4 - Lead on Work Package 4</p> <p>WP4 - Organise & deliver training of counsellors</p> <p>WP4 - Pilot 3 national group coaching sessions with 5 spouses in CH</p> <p>WP4 - Evaluate pilot and adapt coaching methodology</p> <p>WP5 - Attend 3 national stakeholders' group meetings</p> <p>WP6 - Contribute to dissemination and final conference event</p>
P3		Eidgenössische Hochschulinstitut für Berufsbildung - Swiss Federal Institute for Vocational Education and Training (EHB – SFIVET)	<p>EHB will:</p> <p>WP1 - Contribute to internal financial and activity reports as well as interim and final reports to funding body</p> <p>WP1 - Attend 4 partner meetings (CH, FR, NL, SI)</p> <p>WP2 - Contribute to desk research + report on existing methods for supporting applicants throughout the validation process at national level</p> <p>WP3 - Lead on Work Package 3 - Transfer of the validation framework & process</p> <p>WP3 - Contribute to introduce validation method and tools developed in CH</p> <p>WP3 - Deliver national synthesis report on conditions for implementing VAE for spouses + practices in assessing VAE portfolios</p> <p>WP3 - Deliver final synthesis report on assessment methods used in partner countries + recommendations for spouses</p> <p>WP5 - Attend 3 national stakeholders' group meetings</p> <p>WP6 - Contribute to dissemination and final conference event</p>

P4	FR	Chambre de Métiers et de l'Artisanat du Rhône (CMA Rhône)	<p>CMA Rhône will:</p> <p>WP1 - Contribute to internal financial and activity reports as well as interim + final reports</p> <p>WP1 - Attend 4 partner meetings (CH, FR, NL, SI)</p> <p>WP1 - Host partner meeting 2</p> <p>WP2 - Lead on WP2 - Further research and needs analysis of spouses</p> <p>WP2 - Contribute to desk research + deliver national report on existing methods for supporting applicants throughout the validation process</p> <p>WP2 - Organise 1 focus group looking at needs of spouses in FR</p> <p>WP2 - Deliver a final research report on validation contexts and support needs of spouses</p> <p>WP3 - Deliver national synthesis report on conditions for implementing VAE for spouses + practices in assessing VAE portfolios</p> <p>WP4 - Recruit 2 counsellors for training</p> <p>WP4 - Pilot 3 national group coaching sessions for spouses + evaluate pilot</p> <p>WP5 - Organise 3 national stakeholders' group meetings</p> <p>WP6 - Contribute to dissemination activities</p>
P5	NL	Foundation European Centre Valuation of Prior Learning (EC-VPL)	<p>EC-VPL will:</p> <p>WP1 - Contribute to internal financial +activity reports, interim +final reports</p> <p>WP1 - Attend 4 partner meetings (CH, FR, NL, SI)</p> <p>WP1 - Host partner meeting 3</p> <p>WP2 - Contribute to desk research + deliver national report on existing methods for supporting applicants throughout the validation process</p> <p>WP2 - Organise 1 focus group looking at needs of spouses in NL</p> <p>WP3 - Deliver national report on conditions for implementing VAE for spouses + practices in assessing VAE portfolios</p> <p>WP4 - Recruit 2 counsellors for training</p> <p>WP4 - Translate the self-assessment tool into ENG for NL spouses</p> <p>WP4 - Pilot 3 national group coaching sessions for spouses + evaluate pilot</p> <p>WP5 - Lead on WP5 - Quality Assurance & Evaluation</p> <p>WP5 - Create a guide to management of national stakeholders' groups</p>
P6	SI	Chamber of Craft and Small Business of Slovenia (OZS)	<p>OZS will:</p> <p>WP1 - Contribute to internal financial +activity reports, interim +final reports</p> <p>WP1 - Attend 4 partner meetings (CH, FR, NL, SI)</p> <p>WP1 - Host partner meeting 4</p> <p>WP2 - Contribute to desk research + create a national report on existing methods for supporting applicants throughout the validation process</p> <p>WP2 - Organise 1 focus group looking at needs of spouses in SI</p> <p>WP3 - Deliver national report on conditions for implementing VAE for spouses + practices in assessing VAE portfolios</p> <p>WP4 - Recruit 2 counsellors for training</p> <p>WP4 - Translate self-assessment tool into SI for Slovenian Spouses</p> <p>WP4 - Pilot 3 national group coaching sessions for spouses + evaluate pilot</p> <p>WP5 - Organise 3 national stakeholders' group meetings</p>

The **consortium** partners include

- organisations representing SMEs (SGV, CMA Rhône, OZS Chamber of Craft & Small Business of Slovenia);
- adult education provider (EHB);
- organisations with expertise in validation (EC-VPL, PotentialYse);
- organisations specialised in European project management (Pillet & Partners);
- State Departments such as SEFRI in Switzerland and the Ministry of Labour, Family & Social Affairs of Slovenia support the initiative.

2.0 Evaluation Purpose and Methodology

2.1 Evaluation Purpose

Evaluation of European projects is a key aspect for success and qualitative high outcome of the project and implementation of the European policies, and therefore a requirement.

The purpose of the external evaluation throughout the Women in SMEs project is to:

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

The evaluator has looked [see Annex 1 for an overview of sources] independently and objectively at the effectiveness and impact of the activities in the Women in SMEs project as described in the approved project plan.

2.2 Key Areas for Consideration

The aims of this evaluation include:

1. The achievement of the project objectives;
2. The quality, effectiveness and efficiency of the implementation of the project activities;
3. Monitor and assess the compliance between planned results and carried out during the project life cycle;
4. Implementation process of the project;
5. The evaluation of the administrative and financial aspects of the project;
6. Suggestions for improvement in the valorisation after the life time of the project.

2.3 Evaluation Methodology

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

Methods are:

- Analysing the reports and evaluations from international partner meetings and national meetings;
- Document studies such as project reports, minutes, newsletters, e-communication between partners, material developed for the project;
- Observations and discussions during project meetings (also Skype);
- Individual interviews with partners in the project (Skype);
- Following statistics (e.g. number of stakeholders, participants in training, target respondents, dissemination).

3.0 Review & Assessment of Work Packages / Deliverables

For the External Evaluation a scoring system has been used that is similar to the EU system. It is used to measure the status of reaching the objective and results at the end of the project life cycle. The description for the scoring is as follows:

KEY TO THE SCORING SYSTEM

Score	Definition	Description of score
0	No evidence	Did not reach the target and/or no evidence was given that it has been reached
1-2	Very weak	The target was not reached satisfactory and/or to little evidence was given
3-4	Weak	Reached the target to some extent
5-6	Acceptable	Reached the target sufficiently, but not completely or of just enough quality
7-8	Good	Reached the target with some aspects of high quality
9-10	Very good / Excellent	Fully reached the target, with all aspects of high quality

3.1 General suggestions:

Make use of cover pages

As general comment from the evaluators' side it would be most welcomed if each report /deliverable clearly identifies:

- Title;
- Author + organisation;
- Date of delivering;
- Workpackage / deliverable belongs to;
- Version;
- Summary.

An example of a cover page is given in [Annex 2].

Maintain one layout

It would be appreciated by readers if the project could maintain one layout, which also includes a footer with the name of the document and the author/organisation. Reports in general need to have a literature chapter, especially for research reports and reports that are based on other reports / sub-deliverables.

Consistent use of abbreviation (VNIL or VPL)

In the reports for this project different abbreviations are used for the validation and valuation of prior learning / informal and non-formal learning. The following terms are used: VPL, VNIL, VNFIL, RPL, APL are used. For readability purposes, it is better to use in the project only one term.

It is advised to use the term **VPL: Validation of Prior Learning**, as this includes all learning. VNIL only covers Non-Formal and Informal learning, and does not take in consideration the validation of formal learning in the form of diploma's which have been received many years ago (e.g. for older people, in cases the diploma's recently have changed or not existing anymore, etcetera) or in other learning systems (e.g. immigrants, educational / professional, etcetera).

3.2 Evaluation matrix:

The following matrix gives the evaluative findings of the project as of **end of August 2014**.

	<i>Deliverable</i>	<i>Description</i>	<i>Suggestion for improvements (for WP-leader)</i>	<i>Positive / satisfactory aspects + impact</i>	<i>Delivery date</i>	<i>Progress</i>	<i>Score</i>
WP1		Project management					
1		Partner-applicant organisation contract				100%	10
2		Project management meetings between Contractor and Coordinator, 5 over project lifecycle				100%	
3	4x Partner meetings	4 over project lifecycle	Reduce the Financial and administrative matter to essential and send rest as instructions in a mail. Make enough time available for discussing the substantive issues (more than one day needed per meeting).	Both meetings were well organised and well led. Clear and direct minutes.	01/14 06/14	50%	7
4	Skype meetings	Consortium skype meetings, every 2 months or as necessary	More frequent meetings. Keep Skype meetings shorter and reduce time for financial and administrative matters. One item per meeting.	Better understanding. Feeling of a 'team' Quicker hearing needs for more clarification.	08/14 ...	30%	4
5	Progress report	Internal Progress Report - six months in to project, to ensure correct financial and content reporting and management	Updating every 3 months and sending it to the partners.		03/14	25%	8
6	Interim Report	For NA				0%	
7	Final Report	For NA				0%	

	<i>Deliverable</i>	<i>Description</i>	<i>Suggestion for improvements (for WP-leader)</i>	<i>Positive / satisfactory aspects + impact</i>	<i>Delivery date</i>	<i>Progress</i>	<i>Score</i>
WP2	RES	Further Research and Needs Analysis of Spouses of family SME owners					
8	Focus groups with spouses		Unsufficient information.			0%	
9	4x Nat reports	National reports on existing methods for supporting applicants throughout the validation process.	More standardisation in the use of abbreviations. Maintain one layout.	Informative national overviews.	03/14	100%	8
10	Final research report	On the situation of the context of validation in partner countries and the support needs of spouses, highlighting cultural and national differences and similarities.	<ul style="list-style-type: none"> ▪ Report needs to be commented by partners and approved by the partnership; ▪ Clear is what women need, can do, how and formal result, but not clear is what women really want of VPL. 	Short workable overview	03/14	90%	(7)
WP3	TRANSFER	Transfer of the validation framework & process with a focus on assessment methods					
11	National reports	Report on existing assessment methods used in partner countries.		The use of a matrix as guide for writing the reports was experiences very helpful.	04/14	100%	8
31	National synthesis report	National synthesis report on conditions for the implementation of the validation of non-formal & informal learning of family SME managers + practices in assessing VAE portfolios.	Report needs to be commented by partners and to be approved by the partnership (this is also a way of securing the quality and validity of the end products).		0/9/14	90%	(7)
WP4	PILOT	Pilot of the coaching methodology with a group of spouses					

	Deliverable	Description	Suggestion for improvements (for WP-leader)	Positive / satisfactory aspects + impact	Delivery date	Progress	Score
12	Training counsellors	Training of 2 counsellors from FR, NL and SI in the Swiss coaching method and tools by Swiss coaching expert PotentialYse.	More active training and learning methods can be used (social constructivism).	Good discussion about contextualizing and adapting the Swiss method to national contexts.	06/14	100%	8
14	Translation assessment tool	Self-assessment tool translated			9/14	0%	
15	Coaching	National pilot group coaching sessions, 3 over project lifecycle (6 full days).				0%	
16	Methodology adapted	Coaching methodology adapted to national contexts.	Discussion about the national adaptations before the pilot will have a positive impact on effect.			0%	
13	Evaluation of the pilot					0%	
WP5	QA/Eval	Quality Assurance and Evaluation					
17	Interim QA-report	Interim external evaluation report.	Interim QA-report (this report) to be evaluated by the promoter and project partners / feedback to evaluator.		09/14	100%	-
18	Final ext QA report	Final external evaluation report.				0%	
32	QA-plan	Quality Plan "Women in SMEs".	The plan could have included this evaluation matrix.		01/14	100%	8
19	3x NSM-meeting / country	National Stakeholders' group meetings (3 x in each country over project lifecycle).	Make short bullet point reports of the national stakeholder meetings per country (folder Dropbox).		06/14	33%	
20	NSM guide	Guide for National Stakeholder Groups & Meetings.	Guide is missing. Action of NL needed.			0%	

	<i>Deliverable</i>	<i>Description</i>	<i>Suggestion for improvements (for WP-leader)</i>	<i>Positive / satisfactory aspects + impact</i>	<i>Delivery date</i>	<i>Progress</i>	<i>Score</i>
WP6	DISS/EXPL	Dissemination and Exploitation of results					
21	Plan	Dissemination strategy document.			01/14	100%	9
22	4x E-newsletters		<i>Activity postponed to the launch of pilot in the partner countries in Sept/Oct. 2014. Questions: Who is the target group for the E-letter? What will be the themes of next 3 issues? Statistics about the newsletters (how many subscribers / who?).</i>	Good CH newsletter: Clear presentation of project.	06/14	25%	(9)
23	Project logo				01/14	100%	9
24	IPR and exploitation strategy		Make a formal agreement about use of materials and methods.			0%	
25	Project leaflet	For VET professionals & validation practitioners.			02/14	100%	7
26	Project postcards	For spouses of family SME owners.			03/14	100%	7
27	Project poster				03/14	100%	9
28	Spouses videos	Before and after national group coaching sessions.				0%	
29	Final conference					0%	
30	Business plan and sustainability strategic plan		Write a concept for this plan in Autumn 2014, this also helps to decide how to valorise and use the final conference.			0%	

3.3 General score

The overall quality score of the project activities of the Women in SME project is “**GOOD**”, with some activities and outcomes reaching “**VERY GOOD**”.

The work done by the partners, within the budget and time limit of this project, is of good quality. The delay in the beginning is brought back to an acceptable level.

4.0 Project Performance Overview

4.1 Project Meetings

1. The Kick off meeting – Geneva, 20-21 January 2014

(External evaluator not present. Information from documents (Agenda, Minutes, Attendance list, PowerPoint documents of the presentations) and from interviews)

Twelve participants of the seven partners participating in the project were present.

The schedule of the meeting covered all work packages and clear appointments were made, and laid down in a more detailed activity list.

Enough time was allocated for introduction of the partner organisations, to present and discuss the goals and mission and the core of the project and for financial and administrative matters.

During the meeting the WiSME-approach was introduced.

Unsufficient time was allocated to have an in-depth discussion about the self-assessment tool, which lead later on to misunderstandings in the national contextualisation and adaptation of the instrument.

The Kick-off meeting was held two and a half months after the start of the project which caused a delay in the start of the activities in the WPs. It seems that the project has worked effectively to decrease this delay and is more or less on schedule again.

2. Second project meeting, Lyon, 12-13 June 2014

Meeting: 12-13.06.2014: eight participants from six partners

(On Friday some of the participants had to leave earlier, because of strikes in public transport).

The aim of the 2nd partner meeting is the finalization of the preparation, research and the start of the implementation of the transfer of the Swiss method, training the counsellors and testing the VPL-model (WP4).

The aims and outcomes of WP2 and WP3 have been presented and discussed by the partners, as far as information was available at that moment in time and clarification has been given by the partners about specific contextual issues in the different countries. Aim of the work package was to support the functioning and impact of VPL, with developing the expert-VPL-assessors and VPL-guides, including a program for yearly update (1 day) and improve the trained experts. The training is based on the concept of sustainable self-management of competences.

The partners accepted the presented model and instrument for an assessor-training is considered as a generic module. Each partner modified the module to fit in their own national context and the experience and expertise in each of the countries, as was clearly described in the evaluation by each of the partners and debated with their national experts (assessors, trainers). Each partner selected a group of minimal six national stakeholders which debated issues of the VPL approach and instruments gave feedback and reflection and served as a source of information to the project.

- The meeting was well prepared.
- The results of the research have been presented.
- The self-assessment instrument has been clearly described and presented.

It is felt that at this point in the project not yet a development of a learning community has started. This was the right moment in time, because earlier the project was in a developing phase and later the products would have been ready.

The modules adapted and used in the different countries have been used for reflection on the assessment-process in the national case-studies. These reflections have been part of the synthesis of national case-studies (WP4).

3. Skype meeting, online, 21 August 2014

Attendants: seven participants from six partners

The Skype meeting was led by Mrs. L. Pillet from Pillet & Partners.

The main topic of this Skype meeting was instruction for the financial input for the interim report and questions concerning specifically that. The advice is to use the Skype meetings to discuss issues about the content of the project and minimise the time used for financial instruction (and use a guide and communication per e-mail for this). The Skype meetings can in the opinion of the evaluator better be used to discuss progress and questions concerning the adaptation, organisation and design of the pilots in every country and feedback on the national stakeholder meetings.

4. Training of counsellors, Lyon, 11-12 June 2014

Attendants: eleven participants from six partners

The training was led by Mrs. D. Reinhard of PotentialYse.

The background of, the Swiss experiences with the WiSME-approach, methodology and self-assessment instrument have been well explained. Diane Reinhard's introduction was followed by a presentation about the understanding of the items/questions of the grid, the level of knowledge and experience required to handle / answering them and the structure of the guidance and consultation process, was followed by an interesting and useful discussion with participants about the Swiss method and self-assessment instrument. The counsellors expressed that the Swiss method and tools would be difficult to apply as such in their country and that significant adjustments are needed. The differences in educational and qualification systems, levels, and structures, made in virtually impossible to transfer the qualification and VPL-method, without contextualizing and adapting it.

There was (too) little time left to discuss the counselling method (program of 3 full weekends, other meetings, and assignments, etcetera), cooperation with other supporting organisations and other instruments.

4.2 Project Management

The review of documentation, participating in one partner meeting, one skype meeting and one training of counsellors, internal monitoring procedures, regular feedback, discussion with the project manager, four interviews and the feedback of the other partners showed a good project management with clear goals and keeping in mind what has been promised to do and in which time. It was professional and effective.

The project manager has showed leadership in managing the project and leadership in managing the content and bringing the partners together, although the national and institutional contexts differ. The diversity in contexts could ultimately turn into one of the strengths of this project.

The meetings were well prepared. The time for administrative and financial procedures should be minimised, using also other methods (mail, a guide). The time for a meeting should be at least two full days to reach common ground and increase understanding.

Project management is a challenge; working with different learning cultures, states of development, languages and working approaches is a complex endeavour. The project manager shows to be able to handle this complexity.

4.3 Project Communications

Internal communication:

The project manager is clear and structured in her communication with the partners about content and about financial and administrative matters and in making the information available to all in the project Dropbox.

There is an open communication between the partners using e-mail.

The project meetings are well used, but relatively short in time to have all relevant issues discussed thoroughly. More frequent meetings using Skype is advised, to have discussions that actually should not wait until the next project meeting and to maintain the team work.

External communication:

It is not visible to whom the newsletter has been send, neither for whom it is meant (Women? Practitioners? Policy makers?). The networks are indirectly involved in this project, but a plan for dissemination (and/or review/feedback) is not yet available.

4.4 Financial

Documents are not yet ready to be evaluated. This will be done after all forms have been finished and send to the Agency.

4.5 Key learnings

- The need for VPL for Women in SMEs is clear.
- The individual bottom-up approach is the missing link in VPL and urgently needed to make full use of the all competences.
- The training of counsellors was possibly too early, as it was not yet clear if the self-assessment instrument and counselling procedure / process can be transferred, as-it-is, to the other countries and having the adaptation in a later stage of the project.
- There is no “one universal VPL-answer”. Instead it is managing the diversity in looking for optimal combinations of VPL-approaches and instruments, based on the self-assessment method and guiding and counselling and connect these to the national laws, regulations, standards, and educational and professional cultures.

4.6 The EU-dimension

In the project plan eleven statements regarding to the EU dimension are stated. Most of those are related to activities in the second part of the project (dissemination, valorisation).

Nr	Activity		Remarks
1	<i>Transferring knowledge across partner countries to bring in innovative methods of validation/certifying non-formal and informal learning of spouses of family SME owners</i>	+	Ongoing.

2	<i>Cross-cultural learning from partners allowing materials to reflect national knowledge and a European level of understanding of validating/certifying non-formal and informal learning of spouses of family SME owners</i>	+	Ongoing contextualisation of the materials.
3	<i>Providing opportunities for validation practitioners to extend their networks, horizons, skills and knowledge through interaction with peers across Europe, increasing social capital</i>		To do.
4	<i>Pan-European awareness and recognition of the specificity of the management of family SMEs and women's role therein</i>		To do. Dissemination plan Suggested: each partner writes an article.
5	<i>A common European coaching process to support VAE applicants</i>		To be tested in Autumn 2014; contextualisation for each country is needed.
6	<i>Influencing greater numbers of VET systems and policy makers across Europe to consider target groups needs</i>		To do.
7	<i>Wider dissemination and impact due to shared resources across partner countries and EU Association, more access to disseminate the validating approaches to greater numbers</i>		To do.
8	<i>Multiple languages of products allow larger numbers to benefit from the shared innovative knowledge regarding validation support and can have greater access to language and intercultural learning as a result of project participation</i>		Partly possible, because of essential contextualisation.
9	<i>Cooperating enable partners to exchange best practice on an ongoing basis</i>	+	Good discussions, interactions and use.
10	<i>Cooperating on a transnational level broadens dissemination to a pan-European audience; all partners have extensive networks and links (eg: SGV is the umbrella organisation in Switzerland for 250 associations & 300'000 SMEs, CMA Rhône represents 26'725 enterprises, OZS is the umbrella organisation in Slovenia for 62 regional chambers of craft & small business representing 52,000 members), all partners are active at European level ensuring contact with many networks,</i>		To do. Specific action plan is needed.
11	<i>Sharing knowledge and support on a European scale is an empowering activity, particularly for spouses of family SME owners who may be suffering from isolation and low self-confidence. The EU aspects allows them to connect with peers across Europe which they may never have considered before, and encourage them to think creatively about developing their employability, such as undertaking a European mobility, or being involved in European actions (e.g. Supporting Women Entrepreneurs, Erasmus for Young Entrepreneurs, etc.)</i>		To do. Dissemination plan.

Innovation:

Women in SMEs brings to VPL new dimensions by using a self-assessment instrument. It has contributed the change of thinking from “accreditation of portfolio” towards “valuation of a person’s competence profile”.

Transnational partnership:

The partnership is well balanced in the different aspect of the transfer, presenting four countries in Europe. The partnership works well together, taking in consideration the different national systems and levels of VPL. The diversity, together with the commitment, broadened the scope and possible outcomes and still to deliver the project deliverables in time.

European benefit and validity:

Europe will benefit of the full valuation of the competences of women / spouses working in SMEs, making those more visible and having them formally accredited.

Valorisation:

The project involves the stakeholders from the beginning, which clarifies the needs, wishes of the demand, the possibilities from the supply side and the national legal and policy restrictions/conditions. This has led to proposals for necessary adaptation in the project approach (adaptation of the self-assessment tool, different levels – 4 and 5 - in the qualification, using national qualifications and structures). It is advised to start in the beginning of the second half of the project with writing the first concept of the business and exploitation plan and with the preparation of the final meeting, so that the focus of the project changes more from product oriented towards future market oriented.

5.0 Conclusion

The findings in this interim evaluation are positive. So far, the partners of the Women in SME project have realised to deliver according to plan. There were delays in the beginning of the project and some of the work packages, but these delays formed no risk for the total of the project.

The project partnership takes a serious attempt to contextualise the tool and the coaching approach, to adapt the method to the diversity of the national learning systems, the qualification structures and national laws and regulations.

Annex

Annex 1: Meetings / interviews / documents used for external evaluation

To write this Interim External Evaluation Report, different sources of information have been used:

Interviews and meetings

11-12 june 2014	Attending the Training of counsellors in Lyon. The external evaluator participated in the training.
12-13 june 2014	Attending the second project meeting in Lyon. Part of the last day of the project meeting was used for presentation and discussion about the objectives to use for the external quality measurements.
1 july 2014	Skype interview with Diane Reinhard, PotentialYse, CH
21 august 2014	Skype meeting with all projectpartners.
27 august 2014	Meeting with Ruud Duvkot and Kees Schuur, EC-VPL, NL
5 september 2014	Skype conversation with Janja Meglič, Chamber of Craft and Small Business of Slovenia (OZS), SI
5 september 2014	Skype conversation with Martine Gravayat, Chambre de Métiers et de l'Artisanat du Rhône (CMA Rhône), FR

Materials

September 2014	Available information in the project Dropbox (reports, minutes, presentations, spreadsheets)
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Annex 2: Example of cover page for documents

Project Acronym		[LOGO]
Project name:		

EU-project number	
EU-call + agreement nr:	

Project duration:	(starting date).- (closing date)
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PROJECT DELIVERABLE / INTERNAL DOCUMENT

(Belongs to) Deliverable nr:	
Name:	
Dissemination level:	Public / Restricted
Document status:	Draft / final
Document date:	
Delivery date:	

Author: Organisation:	
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Summary:	
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Project Coordinator	Project partners
	P0 - ... (Promotor) P1 - ... P2 ...

Project information:

Project Number:		Acronym:	
Project name:			
Project URL:			
Document URL:			
EU Project Officer:			

Document information:

(Under) deliverable nr:		Title document:	
Work package nr:		Title WP:	
Planned date of delivery:		Actual delivery:	
Status:	Draft / final		
Nature:	Document / report / video /		
Dissemination level:	PP / PR		
Name Author:		E-mail:	
Partner/sub-contractor:		Telephone:	

Summary:	
Keywords:	

History chart:

Version nr.	Date	Changes	Cause of change	Changed by:

Authorisation:

No.	Action	By	Date	Signature / mail
1	Prepared and send			
2	Approved			
3	Released			



This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use, which may be made of the information contained therein.