

# **Business Performance and Improvement through Employee Skills Training (BOOST)**

## **Project Evaluation Plan**

April 2014

## **Aims of the Project**

The project will create a cross-border and cross-cultural approach to increasing participation by Micro and Small Enterprises (MSEs) in Vocational and Educational Training (VET) by the use of Innovative Operational Supportive Methodologies (IOSM). The IOSM will lead to greater engagement of MSEs and increased co-operation between them and VET.

The IOSM establishes Business Critical Needs (BCNs) for an enterprise and identifies the associated Learning Indicators by employee. BOOST supports the development of the learning / training plans for employees aligned to BCNs.

The use of the transferred and enhanced Cartesia Tool into BOOST not only assists in the identification of the BCNs and the learning indicators but also provides graphically clear evidence to both enterprises and their individual employees of the benefits of the learning. It will provide easy to read graphical displays of progression and the achievement of targets by both employees and the business. The innovative practice in MSEs supports the achievement of, as well as enhancing the attractiveness of VET to employers by clearly relating the training / learning by their employees to their specific business requirements. The transfer and adaptation of the Responsive Open Learning Environment platforms and tools will provide the learning / training solutions needed to ensure that the learning indicators identified using the Cartesia/BOOST tools are met.

## **Aims of the Evaluation and Quality Assurance Process**

Evaluation and quality assurance will focus on Management and Leadership, communication between partners, communication and feedback from stakeholders including reporting to funders, delivery of outputs by timescale and to budget, quality assurance of the products and outcomes, satisfaction of clients and stakeholders in the project progress and impact and sustainability.

Evaluation: Work Package 6 is led by Grafia (Czech Republic).

Evaluation is both quantitative and qualitative. It will look at the project in terms of outcomes, i.e. did it do what it set out to? And also the experience of participants, be they partners, learners, managers etc. There will be formal interim and final project evaluation reporting to PO but also ongoing feedback to partners at key stages of the project and at all Transnational meetings.

The Evaluation will focus on OUTPUTS and PROCESSES. The Evaluation Plan/process is designed as an aid to partners. It outlines the Project's intended results, evidence sources generated by partners and additional evaluation tools designed by WP6. All work packages should embed evaluation and it is important that Evaluation is not seen as an external responsibility.

The WP6 Evaluation process will monitor and comment on all aspects of the project, offering feedback to partners at meetings and in reports. It will encourage partners to reflect on the processes they implement and results they achieve. It will do this by monitoring evidence generated

by partners in the course of delivering the project such as reports, handbooks, artefacts. It will also comment on the quality of the partnership by using partner surveys and feedback tools.

In particular, WP6 will focus on

- Innovation – added value for users
- Transnationality – standardisation and availability in partner languages
- Partnership – consultation and contribution levels
- Validity – user feedback and usage data – does it do what it says on the tin?
- Dissemination – scope of networks and uptake
- Valorisation – usage figures, feedback and impact, exploitation, mainstreaming.

A key tool for Evaluation is the Partner survey. This, however will be used in conjunction with evidence generated by WP leaders, external evaluations and response rates.

(Guidance: Evaluating your activities – Leonardo 2007-2013)

## **Methodological Framework**

Is both formative and summative and described in this document. Evaluation will be done in conjunction with partners. It includes:

- Defining performance indicators by Work Package
- Developing a useful Evaluation Plan in consultation with partners
- Defining the data to be gathered and sources
- Developing a Partner quality survey to be used across the life of the project
- Analysis of data to be presented in reports and at Transnational meetings alongside WP leader reporting and feedback from the External Evaluator
- Ongoing timely feedback to partners of issues arising using appropriate media e.g. email, Skype, Flash Meeting

## **References**

Details of all Work Package outputs can be found as Annex 1.

Expected Results of the project can be found as Annex 2.

The Partner Questionnaire can be found as Annex 3

## Responsibility for Evaluation

The responsibility for the progress and delivery of project results is spread across the partners and led by the respective WP leaders. On-going quality assurance led by WP6 will include a wide range of partner feedback sources. Evaluation Reporting will comment on the quality of inputs or actions taken to achieve results, the quality of outputs e.g. fit for purpose and delivered on time and outcomes.

### Sources of evidence

Much evidence will be generated in WP leader reports. These will include the results of pilot questionnaires, user trial results, user manual feedback etc. WP6 will not duplicate this work but use it as a reference and evidence source. The value WP6 adds to the project will be to describe the effectiveness of the partnership in delivering what it set out to do and to invite partners and wider stakeholders to comment on their experiences. The Partner questionnaire will look at all aspects of Partner engagement and be used at all transnational meetings. Annex 3 Partner Questionnaire

### Sample topics for Evaluation

#### Formative evaluation

- project manual (do partners find it easy to use and relevant?)
- communication channels (does the web based project management system work well?)
- transnational steering group meetings (are minutes from the meetings produced, true and understandable?)
- production of reports (are reports produced on time and a true representation?)
- project partners' views on transferred products from BECOME and ROLE projects in the light of suitability for MSEs and VET providers
- technical prototype (was consultation with all partners adequate?)
- case studies (were they produced based on results of piloting? Do they give a fair representation of responses?)

#### Summative evaluation will include:

- project manual (was it produced on time and fit for purpose?)
- number of companies in pilot (did that comply with the target number?)
- reports (were the reports produced duly and accurately?)

- Guidelines supporting the transferred products (were they delivered on time and usable?)
- technical prototype (was it produced on time and usable?)
- case studies (did the number of case studies comply with the number stated in the plan?)
- promotional materials and evaluation tools for piloting (are they delivered on time and in the number required according to the plan in partner languages?)
- dissemination (did the number of key stakeholders to which the products is disseminated meet the initial plan?)
- public-facing web presence-traditional website + social media (was the task fulfilled on time according to the dissemination plan?)

## **Quality Assurance Framework**

The QA Framework is described in the following tables. The key activities of each Work Package are presented in terms of preparatory input, developed output and evidence. An additional layer of QA is provided by the Partner Survey developed and used throughout the project period.

### **Partner survey**

Throughout the project, WP6 will use a Partner Survey. This is a developing document that aims to capture partners' views and experiences alongside activity. It will capture comments and opinions that may not be expressed elsewhere in project documentation. The aim of the Partner Survey is to see how well the project plan works, within the context of each of the partner' situations and to look for consistancies or issues in delivery.

The main focus of WP6 is to monitor the Evidence described in the WP tables below along with Quality Assurance outcomes. Feedback will be given to partners at Transnational Meetings. Partner surveys used throughout the project, in the most appropriate form i.e. hard copies or online, will have results collated and interpreted and be presented as interim and final reports to be included in P1 reporting.

## **Evaluation by Work Package and Timeline**

### **Work Package 1 – Project Management and Co-ordination**

#### **Lead Partner: The MRS Consultancy and RWTH Aachen University**

WP1 is responsible for contracting with partners, monitoring payment to partners, authorising financial spend and the transfer of funds to partners. It must make all activities visible on the BSCW and ensure all partners have access to it. WP1 has overall responsibility for delivering the project and will receive regular reports from partners on progress towards project objectives.

The WP1 leaders have a responsibility to support partners who experience difficulties that might impinge on the project. They are responsible for supporting Transnational Steering Groups, though local hosts will arrange them. They will also carry out ongoing evaluation on the effectiveness of meetings through questionnaires and report at regular intervals to the Partners and funders. WP1 is responsible for ensuring the quality of technical devices used as partner communication tools. (More details of this WP can be found as Annex 2)

**Table WP1**

Key Inputs/aims	Key Outputs	Evidence	Quality Assurance source - Outcomes	Result no.	Time mm/yy, (or period)
Preparation of partner contracts and commitment of partners	Partner contracts ready for signature	Partner contracts signed by partners and update on BSCW	<b>Partner survey feedback</b>		10/2013 - 01/2014
Standardisation of project procedures across the partnership	Project handbook approved by partners after consultation	Project handbook distributed to partners for consultation and uploaded onto BSCW. Changes implemented.	<b>Partner survey feedback on usefulness in particular:-</b>  Delivered on time  Consultation process followed  <b>Other evidence</b>  Adherence by partners to processes.	1	10/2013
Structure of Meetings and supporting documentation and attendance sheets	Meeting agendas, communication papers, recording events and actions	Meeting agenda circulated on time, Good use of time, inclusive Agendas.  Relevant minutes  Evidence on BSCW	<b>Partner survey feedback:-</b>  Appropriateness of meeting agendas and support documents.		3 weeks before the meeting

Secure web-based project management system designed	Secure project website usable and trialled by partners	Web site available and used.  Usage data	Usable secure web site  <b>Partner survey feedback</b>	2	11/2013
Reporting formats	Meeting report completed in 3 weeks post meeting.(Transnational and bilateral meetings)	Meeting report uploaded onto BSCW, feedback from partners received within 10 days  Evidence on BSCW			3 weeks post meeting
Virtual (flash) meeting agenda prepared. Link for signing in to the virtual meeting sent to partners	Virtual meeting minutes completed in 5 days from the meeting and uploaded to BSCW	Actions completed in line with minutes and minutes read by all partners.  Evidence in Flash Meeting recordings.  Minutes on BSCW	<b>Value of Flash Meetings in Partner survey.</b>		5 days after the meeting
Partner reporting quarterly on progress. Reporting to include spend, problems, variations etc.	Quarterly reports uploaded to BSCW	BSCW, minutes of meetings etc.	<b>Partner survey feedback</b>		12/2013 03/2014 06/2014 09/2014 12/2014 03/2015 06/2015 09/2015
Preparation of documents for Interim and Final Report by all partners	Interim and Final Reports collated by P1	Interim and Final report completed by P0 and P1  Evidence on BSCW	<b>Partner survey</b>		09/2014 08/2015

Financial management.	Six monthly report on financial returns collated . Timesheets, Claims documents available on BSCW	Collated six monthly report on financial returns uploaded onto BSCW	Report showing spend against activity. Divergence investigated and described.		03/2014 09/2014 03/2015 09/2015
Communication channels set according to the project handbook	Communication channels approved by partners	Communication channels used: e-mail, BSCW, virtual meetings, real meetings etc  Evidence of usage	<b>Partner survey feedback</b>		11/2013

## **Work Package 2 - Integrating and harmonising the learning offer to small and micro enterprises (MSEs) and their employees**

### **Lead Partner: The MRS Consultancy and RWTH Aachen University**

Work Package 2 is responsible for harmonising the ROLE (Responsive Open Learning Environment) - platform and tools & the Cartesia tool. It will do this in consultation with partners and take account of the differing needs of end users. As a result of consultation, a working prototype will be uploaded and available to all partners for early trial and discussion.

Adapted in line with feedback, a technical working prototype will be available before the second transnational meeting in Greece. The Tool will be demonstrated at the second transnational meeting and further feedback invited from partners.

By months 5-6 of the project, an operational prototype along with guidance materials will be available to partners to trial with end users. Feedback from end user consultations will be uploaded to BSCW.

**Table WP2**

<b>Key Inputs</b>	<b>Key Outputs</b>	<b>Evidence</b>	<b>Quality Assurance source - Outcomes</b>	<b>Result no.</b>	<b>Time mm/yy, (or period)</b>
Review of ROLE platform and	Feedback form filled by all	All partners participate in feedback.	<b>Partner Survey</b>		11/2013

Cartesia tool.	partners	Completed feedback forms uploaded onto BSCW	<b>feedback</b>		
Functional requirements of BOOST identified based on requirements of target groups by partners	Report on functional requirements created by P0	Report on functional requirements available on BSCW			01/2014
Creation of integrated package from transferred softwares (ROLE and Cartesia tool)	Integrated package consultation including all partners and completed	Discussions by e-mails, flash meetings, bi-lateral meetings  Minutes from meetings uploaded onto BSCW and sent by e-mail, e-mail discussions evidenced via e-mails delivered to all partners			04/2014
Technical prototype for early trial created based on discussions within the partnership	Technical prototype for early trial completed by P0 and P4	Discussions via e-mails, flash meetings  Technical prototype for early trial made available to partners via on-line links sent by e-mail and on BSCW before the 2 <sup>nd</sup> Transnational Meeting and fit -for-purpose.	<b>Partner survey</b>  Technical prototype available	3	02-04/2014
Operational Prototype draft (IOSM) preparation by P1	Operational Prototype (IOSM)	Discussions via e-mails and flash meetings	<b>Partner survey</b>  Operational Prototype made available to partners via e-mails delivered and on BSCW.		02-04/2014

Guide for the Operational Prototype preparation by P1	Guide for the Operational Prototype (IOSM) created by P1	Discussions via e-mails and flash meetings, Guide created by P1	<b>Partner survey</b> Guide for the Operational Prototype sent, evidenced by e-mails delivered to partners and on BSCW	4	03/2014
Consultation with target group on the Boost product match with target group requirements	Boost product match with target group requirements by partners	Discussions via e-mails	<b>Partner survey</b>		03-06/2014
Reports on Consultation Results and Modification from all partner countries	Report on Consultation Results and Modifications	Report on Consultation Results and Modifications collated and completed by P1	<b>Partner survey</b> Partner reports and collated report on Consultation Results and Modifications evidenced on BSCW	5	06/2014

### **Work Package 3 – Preparation of integrated tools and associated operational methodologies for transfer to new countries**

#### **Lead Partner: Greta du Velay**

Work Package 3 is responsible for reviewing the Tools and supporting platforms from the technical and operational perspective of the VET providers and MSEs consulted in the pilot. Their report on the consultation will include any recommendations for modification and changes to the BOOST tools should they arise. Partners will be kept informed of changes prior to the 3<sup>rd</sup> Transnational meeting via email and BSCW

The revised Tool and IOSM will be presented at the 3<sup>rd</sup> Transnational meeting for approval by partners. Once approved, both will be made available in languages that support speakers of Czech, Greek and English by month 15 of the project.

**Table WP 3**

<b>Key Inputs</b>	<b>Key Outputs</b>	<b>Evidence</b>	<b>Quality Assurance source - Outcomes</b>	<b>Result no.</b>	<b>Time mm/yy, (or period)</b>
Report on Consultation Results and Modifications	Review of Report on Consultation Results and Modifications created by P0, P1, P4	Questionnaires completed by partners and uploaded to BSCW	<b>Partner Survey Feedback</b>		06/2014
Modifications based on Review approved by partners	Platform amended	Platform amended and tried by partners	Amended platform available on-line, link uploaded on BSCW and sent by e-mails		06-09/2014
Compilation of User Guide for platform and tools with partner amendments included	User Guide	User Guide created by P0  User Guide uploaded on BSCW and sent by e-mail	<b>Partner survey</b>		09/2014
Translations using electronic template	Translations of platform, integrated tools, methodology and User Guide into Czech and Greek	Translations completed by P2 and P3  Translations evidenced using electronic template, uploaded on BSCW	<b>Partner survey</b>		09-10/2014
Translations incorporation into the	Platform and integrated tools in the prototype	Platform and tools incorporated into the	BOOST product in the prototype code uploaded on BSCW	6	12/2014

prototype code	code	prototype code by P1 and P4 evidenced on P1 and P4 servers and BSCW	<b>Partner survey</b>		
Translation of the operational methodology (IOSM) and User Guide	Translations of IOSM into Czech and Greek	Translation of IOSM by P2 and P3 completed	Translations of IOSM uploaded on BSCW along with User Guide  <b>Partner survey</b>	7 & 8	12/2014

#### **Work Package 4 – Piloting and testing the integrated tools and methodologies in all partner countries**

##### **Lead Partner: Asset technology**

Work package 4 will lead on the development of a piloting approach across the project. This will include the generation of interest through professional networks and the recruitment of MSEs in line with the IOSM principles developed under WP2. Piloting will work with MSEs to identify Business Critical Needs and supporting learning resources.

Once BCNs are identified, users will be supported in creating Personal Learning Environments that support self regulated learning and might include tools to aid goal setting, time planning and learning activities. Learning progress will be tracked by both individual learners and the employing organisations.

WP4 will, with partners, capture the experiences of the MSEs and employees participating in the pilot. They will gather responses across the partnership through standardised tools in the form of user response data, case studies and objective impact measures.

**Table WP 4**

<b>Key Inputs</b>	<b>Key Outputs</b>	<b>Evidence</b>	<b>Quality Assurance source - Outcomes</b>	<b>Result no.</b>	<b>Time mm/yy, (or period)</b>
Develop with partners a responsive	Agreed approach to promoting the	Questionnaire filled by partners and	<b>Partner Survey Feedback</b>		09/2014

promotional strategy to raise awareness of the value of the BOOST tools to the target audiences and attract the Pilot MSEs.	use of new integrated platform	collated by P3  Summary of questionnaire responses uploaded to BSCW			
Development of promotional materials and evaluation tools for piloting WP4	Promotional materials agreed by partners and standardised evaluation methods approved	Materials and Evaluation tools available on BSCW in relevant partner languages  Consultation responses recorded and uploaded to BSCW.  Promotional materials available on BSCW	<b>Partner survey</b>  Materials and Tools on BSCW	9	09-10/2014
Recruitment of MSEs to pilot Tools and IOSM.	No. of MSEs recruited by partners: D(10), CZ (10), EI (10-12), Fr (12-14), UK (12-15)	List of MSEs recruited by partners uploaded on to BSCW	Actual numbers recruited against planned.  <b>Partner survey</b>		09-10/2014
Pilot Tools and ISOM with target groups is prepared and executed.	Pilot MSEs were supported in accessing a wide range of appropriate online and off line tools using BOOST.	Records of events are created on the BOOST tool, these include PLEs created during Pilot phase, progress tracking by individuals and organisations etc	All partners use the agreed pilot approach and reach planned numbers of MSEs.  Data files are held.  Evaluation sheets completed by all partners.		10/2014-02/2015

Collation and evaluation of the Pilot data.	Evaluation report	Report on Pilot findings created by partners and collated by P3. Uploaded to BSCW  Evidence of adherence to Pilot protocols by partners	Pilot Report  <b>Partner survey</b>	10	03/2015
Organisations identified as the subject of case studies and approached.	Case studies produced by partners.	Case studies created in a variety of partner languages?  Case studies approved by participating MSEs	Case studies created by partners and uploaded on to BSCW  <b>Partner survey</b>	11	05-06/2015

## Work package 5 – Dissemination and Sustainability

### Lead Partner: The MRS Consultancy

Work package 5 is responsible for developing a comprehensive dissemination and sustainability strategy for the project. It will work with partners to identify target groups and organisations that will benefit from the project and contribute to sustainability. This will include local, regional and national organisations along with EU wide networks and stakeholders.

The strategy will include dissemination plans complete with communication channels, scope and media. Dissemination will be wide ranging and include articles, web sites, seminars, exhibitions, conferences and social media etc. Activities by partner will be described in Dissemination Plan templates and uploaded to the BSCW.

The Dissemination strategy includes early consultations with potential end users, complex networking through partner supply and distribution chains and social media forums. The Project will hold a final Conference for target group representatives, stakeholders and experts in the field. The Conference will be video streamed and simultaneously translated.

### Table WP5

Key Inputs	Key Outputs	Evidence	Quality	Result	Time
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			<b>Assurance source - Outcomes</b>	<b>no.</b>	mm/yy, (or period)
Dissemination strategy to be drawn up based on Partner input to Communication Audit.	Dissemination strategy to be agreed by all partners with clear actions and timescales. (SMART)	Communication Audit Questionnaire filled by all partners and collated by P1  Meeting minutes etc	<b>Partner Survey Feedback</b>  Dissemination Strategy and supporting input by partners.	12	02/2014
Identification of key dissemination routes and organisations by all partners through Communication Audit survey.	Dissemination templates completed by partners. Includes lists of target groups representatives and associated dissemination activities matching message to appropriate media by type; at key stages in the project delivery.	Completed Dissemination templates collated by P1  Completed Templates uploaded on BSCW and delivered by e-mails	<b>Partner survey</b>		Before each Transnational meeting
Ongoing targeted communication with dissemination networks that	Evidence that the target groups are receiving dissemination outputs by	Discussions via e-mails, via personal meetings.  Visual and audio evidence on web	<b>Partner survey</b>		10/2013-09/2015

<p>will include partners' inputs to web site, social media, emails, events etc</p>	<p>responding, commenting attending events etc.</p>	<p>site. Relevant activities as a result of communications.  Web site data included hits, comments, response rates, feedback etc  Partner reports describing activities in this area.</p>			
<p>Final conference preparation.  Invitation to all identified target organisations sent timely and using appropriate media.  Video streaming arranged and information/ links sent in good time to relevant bodies.  Conference literature and online content developed in good time.  Video stream tested</p>	<p>Final conference takes place.</p>	<p>Good attendance at Conference and participation in video streaming.  Agenda and the list of participants uploaded onto BSCW and delivered within partnership by e-mails</p>	<p>Conference evaluation by partners  Conference evaluation by attendees.  Tool usage data</p>	<p>14</p>	<p>09/2015</p>

Post-project dissemination and sustainability strategy	ability actions Sustainability Action plan by partner in place and operational Public facing web site	Documentation and activity on web site and BSCW Identified responsibilities for maintaining communication including web presence.	Determined by Sustainability strategy. May include contact lists, media events, ongoing hosting of BOOST Tools etc  <b>Partner survey</b>	13 15	09/2015
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## Work Package 6- Quality Assurance and Evaluation

### Lead Partner

WP6 will work with partners to ensure that the project is delivered effectively. It will do this by shadowing the project activities and milestones, soliciting partner feedback at regular stages and monitoring evidence that the project is delivered in the spirit planned. Evaluation findings will be regularly fed back to partners to enable changes and modifications to be made at the earliest opportunity. WP 6 provides a service to partners offering solid feedback and opportunities to reflect on work flow and delivery.

**Table WP6**

Key inputs	Key outputs	Evidence	Quality Assurance/ outcomes	Result no	Time mm/yy, (or period)
Prepare an Evaluation Plan and QA Framework	Draft plan for consultation with partners at second Transnational meeting.	Amend plan after consultation. Upload to BSCW	Plan implemented, evidence on meeting notes, Partner survey and reporting.  <b>Partner survey</b>	16	04/2014
Monitor project	The Evaluation	Meeting notes	<b>Partner survey</b>		04/2014-

progress against the Evaluation Plan	<p>Plan Tables show outcomes and evidence by WP.</p> <p>Evaluation will be an Agenda item at each Transnational meeting and WP6 will give feedback on:</p> <p>a) Evidence and b)Quality Assurance as described in the Evaluation Plan</p>	Reports	<b>and results reported</b>		09/2015
Develop longitudinal Partner feedback survey	<p>Draft survey to be trialled at 2<sup>nd</sup> Transnational meeting.</p> <p>Partners view sought on approach.</p>	<p>Partner survey available on BSCW</p> <p>Meeting minutes on BSCW</p>	<b>Completed partner surveys</b>		04/2014
<p>Collation of partner feedback results</p> <p>Collation of monitoring activity as described in WP tables</p>	<p>Reporting and feedback will be ongoing however there will be formative reporting at Month 13 and Final Summative Evaluation Report in English with summaries in partner languages by Month 23</p>	<p>Transnational meeting mins, formal reporting</p>	<b>Collated Partner Survey report</b>	17	10/2013-09/2015
External	Role to be				Shall be agreed

Evaluator	agreed?				04/2014
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## ANNEX 1 Work Packages Summary Output details

### Work Package 1 – Project Management and Co-ordination

1. **Contractualization procedures.** Evidence of documentation and verification of dates of partner signatures. A list of partners who already signed the contract and dates of payment made by PO will be created by PO and made it known to all partners. In case of failure of meeting the payment deadline, this has to be solved with the project coordinator and the coordinator and partners respectively. The tasks will be ensured by PO and P1 **(Month 1-4)**.
2. **Financial management.**The coordinator P1 checks whether the reports on financial spend were obtained by partners duly and based on that creates a collated report and publish that on project management e-system to be available to all partners. PO is responsible for transfer of funds to partners **(Month 1-24)**.
3. **Monitoring of financial spend.** Monitoring of financial spend on WPs, actions etc. is executed by the coordinator P1 using standard EC / German National Agency spreadsheets for monitoring of spend. The progress and monitoring of financial spend is a part of each transnational meeting and is available to all partners on BSCW (on-going basis, **Month 1-24**).
4. **Achievements of the aims.** Will be controlled by WP leaders yet before the deadline.If any of the partners legs behind with the work he/she will obtains warning from the WP leader.The partner concerned provides feedback on reasons for the delay, in case of problems the WP leader informs the coordinator P1.Joint solution has to be found to avoid failure of other deadlines. Partners will report on achievements of profiled targets from the qualitative and financial ponit of view and on on quarterly basis. Early identification of problems is made via on-going monitoring of WP leaders by the coordinator. If a problem is identified the WP leader and the coordinator shall agree on solutions.**(Month 1-24)**
5. **Project management e-system (BSCW).** This is an internal control mechanism based on which each partner finds whether he/she submits documents to date. In case of any problems these are solved between the coordinator P1 and a problematic partner. Important is the responsibility of each partner to all partners respectively. All partners will verify the functionality of BSCW, if any problems occur the administrator of BSCW will be notified. In case of malfunctions of the system identified by an individual partner this will be solved between the partner and the administrator of BSCW. In case the e-system is not fully functional and communication among partners might be endangered the coordinator P1 is informed. Administration of BSCW is a responsibility of PO **(Month 1-24)**.

6. **5 Transnational Steering Group Meetings will be held throughout the project** - hosting partners will arrange logistical arrangements a month ahead of the meeting, P1 suggests the agenda which will be agreed via e-mails by all partners before the meeting and thereafter published on BSCW. Each partner is obliged to respect the agenda. Partner P2 oversees if all items of the agenda were discussed. Provided it was not discussed the coordinator is notified where appropriate. An integral part of any transnational meeting is a **questionnaire on quality assurance of process and product** at a given stage. The questionnaire will be created and sent to all partners by P2 yet before the meeting. After the evaluation the results will be reported and discussed at the meeting. P2 will further send to all partners the Internal evaluation of partnership activities questionnaire after each transnational meeting and report the results at six monthly intervals on overall quality control of the project **(Month 1-21)**
7. **A project procedures manual.** The procedures manual is created by P1 to describe contract reporting and serves as a basis for communication among partners. The principal is that all partners use the same documents that are collated by the coordinator **(Month 1)**.
8. **Technical issues in communication** – ensuring technical quality of on-line conferences, e.g. audio quality and safe internet connection at all partners. The same applies to meeting venues. The technical quality of communication devices will be monitored by all partners and discussed in the course of the project, “loud speaking” voices in terms of addressing the poor quality will be taken into account **(Month 1-24)**.

**Work Package 2 - Integrating and harmonising the learning offer to small and micro enterprises (MSEs) and their employees**

1. **Review of transferred products ROLE (Responsive Open Learning Environment) - platform and tools & the Cartesia tool** – a feedback form containing the list and description of current products and associated on-line links is created by P1. Partners are supposed to express their views on what shall be transferred into the new product and what not in order to meet the needs of MSEs in partner countries in terms of technical and methodological aspects and in the light of the cultural – business and training requirements. The filled questionnaires are evaluated and collated by P0. The results are discussed by partnership via on-line conference and e-mails **(Month 3)**.
2. **Creation of an integrated package from transferred software products and platform.** Information documents from results of technical meetings will be available to all project partners (by e-mail, via uploading onto project management e-system). Discussions on results will be conducted by means of on-line conferences throughout the whole process of producing technical working prototype. Results from discussions will be collated and made known to partners by P0 **(Month 4-7)**.
3. **Technical working prototype (TP).** The functional working prototype will be available yet before the Second Transnational meeting in Greece so all partners could pre-test the tools

from their countries to be more familiar with them, prepare notes and a short feedback regarding the prototype. This enables better communication of the final tools towards all partners during the demonstration and testing at the meeting. This in turn will help to provide more efficient and quality product assessment. After the demonstration of the final tools at the meeting a feedback questionnaire will be created by P2 and distributed to partners, results collated and reported **(Month 5-6)**.

4. **Operational prototype (OP)** will be created by P1 together with the Guide for the Operational Prototype. Finalization of methodological approaches will be done based on consultations with the target group representatives, VET providers and MSEs. A feedback questionnaire will be created by P2 and distributed to target group within the consultation phase. Results will be collated by P2 and reported via BSCW and e-mails to all partners **(Month 5-6)**.
5. **Consultation with target group within partner networks.** Partners will draw up a list of representatives of target groups i. e. MSEs, VET providers and other key stakeholders that will be presented both prototypes (technical working prototype and operational prototype) including the Guide for the Operational Prototype and make the list available on BSCW. A feedback questionnaire will be created by P2 taking into account capturing of cultural differences in respective countries. Responses from the target group within partner networks will be collected, collated and reported to partnership by P2 to gauge commonality and cultural differences and collated report uploaded on BSCW. The findings will be transferred to either of the prototypes **(Month 6-9)**.

### **Work Package 3 – Preparation of integrated tools and associated operational methodologies for transfer to new countries**

1. **Reviewing the Report on Consultation Results and Modifications.** The integrated tools and platform will be reviewed from both technical and operational viewpoint of VET providers and small business owners and their employees. P0,P1 and P4 will discuss the Consultation Report and the feasibility of any modifications suggested **(Months 8-9)**
2. **Adding and completion of feasible modifications to the platform and integrated tools.** P0 and P4 will project additional modification and make amendments to the platform and the integrated tools **(Months 9-12)**
3. **Demonstration and approval of platform and integrated tools to be used in piloting.** The product prototype will be demonstrated at the Third Transnational Meeting in France. Before the meeting the link at the prototype shall be made known via BSCW and sent to partners by e-mail. Ensured by P0 and P4. **(Month 12)**.
4. **Compilation of User Guide for the platform and tools.** P0 will compile a User Guide in English and will discuss any amendments at the Third Transnational Meeting in France **(Month 12)**.

5. **Translations of the platform, integrated tools, operational methodology and Guidebook into Czech and Greece.** This is a critical stage. Based on previous experience from other Leonardo projects the translations shall be made using an electronic template designed to assist partners in providing a logical translation process from which results can easily be incorporated into the codes of the platform and tools. Otherwise the translations will be delayed. Ensured by partners P2 and P3. **(Months 12-13).**
6. **Incorporation of the translations into the prototype code.** Completion of the platform and integrated tools to be ready for piloting. Ensured by P0, P1 and P4 **(by the end of Month 15).**
7. **Modified operational prototype (IOSM) completion.** Ensured by P1. Operational methodology will be circulated to partners for comments before the Third Transnational Meeting **(in Month 10)**. Comments will be incorporated and presented for the approval by partners at the Third Transnational Meeting in France. **(Months 10-12).**
8. **Translation of the operational methodology (IOSM) for the use in piloting.** Ensured by P2 and P3 **(by Month 15).**

#### **Work Package 4 – Piloting and testing the integrated tools and methodologies in all partner countries**

1. **Agreement on general approach to promoting.** Approach to promoting the use of new integrated platform with partner target groups agreed **(Month 12).**
2. **Recruitment of MSEs.** Recruiting will be done mainly through the networks involved in the consultation processes utilizing the principles of the operational methodology developed under WP 2 and WP3. **(Month 12 – 13)**
3. **a) Working with MSEs to establish their Business Critical Needs.** This includes working both with management and employees. **b) Identifying learning resources using Requirements Bazaar.** This represents working with management and employees on identifying and/or customisation of learning resources. Individual employees will try during this period to create their Personal Learning Environment. Subsequently Self Regulated Learning will take place in the piloted companies. Individual employees will plan their learning, learn and reflect on their learning **c) Measuring the progress towards the achievement of learning indicators.** In this task progress will be measured in both individual employees and businesses as a whole using the transferred tool **(Month 13 - 17).**
4. **Investigation of experiences of the businesses and its employees.** During this time period overall responses of the MSEs to the transferred product will be found. This means gathering and evaluating responses to the tools, demonstrating their values as a method of increasing participation in training, capturing examples of successful use of integrated tools and methodology, suggesting modifications stemming from the practical use of the transferred product in piloting **(Month 18 – 20).**

5. **Case studies.** There will be produced case studies in each partner country, subject to the approval of participating businesses and its employees (**Month 20 -21**).

#### **Work package 5 – Dissemination and Sustainability**

1. **Identification of target groups.** Each partner will map organizations external to partnership and create a list of these organizations, i.e. EU-wide networks to provide access to VET providers, EU-wide networks to small and micro businesses, EU-wide networks for learning using technology, National or regional networks targeting VET providers, national or regional networks targeting SMEs. A list of representatives of the target group will be compiled and released to the partnership via BSCW (**Month 1- 5**).
2. **A full dissemination strategy** for activities within the project will be drawn up based on National Dissemination Plans collected from all partners. A collated report will be created by P1 (**Month 5**).
3. **Dissemination via different communication channels, on-line and off-line.** Partners will release articles in professional magazines and provide interviews, choose websites, newsletters, publications, conferences, seminars and exhibitions relevant to BOOST aims and objectives in their countries to publish information on BOOST, and at the same time publish the information on their own web pages. Information will further be released through social media for public access and through project website. The evidence on this will be found at BSCW in the form of copies of documents and links to the respective resources. The evidence on dissemination activities on BSCW will be structured by partners. A National Dissemination Plan template containing dissemination activities dates and named representatives of the target group will be created by P1, filled by each partner and updated on an on-going basis. Results to date will be presented by P1 at Transnational Steering Group Meetings (**Month 1-24**).
4. **Consultations with potential end-users.** Evidence on consultations will be made via creating lists of target group representatives by each partner and uploaded on BSCW. Results of consultations will be uploaded on to BSCW in the form of a collated report which will be produced by P1 (**Month 6-8**).
5. **Dissemination through the networks of partners.** Extensive networks of partners will be exploited, e.g. through partners in previous projects relevant to BOOST objectives and their partners outside Member States. A list of representatives and organizations in particular networks will be created using close relations and social networks, e.g. LinkedIn (**Month 1-24**).
6. **Final Conference.** Invitation of target group end-users and a wider range of Stakeholder representatives both from partner and other EU countries. Partners will create a list of potential conference delegates from their countries and address them by e-mail. The list of those who have confirmed the participation will be entered into BSCW by P0. The program of

the conference will be video-streamed and simultaneously translated, this will be ensured by P0.(Month 21).

- 7. Post-project dissemination and sustainability.** Based on membership of partners in organizations with strong links to target groups post-project dissemination activities will be extended and project results further exploited. The evidence on partner memberships will be drawn up and uploaded onto BSCW (**Month 1-24**) and after the project's lifespan).

## **ANNEX 2**

### **Expected Results (1-17)**

**1. Project Handbook / Project Procedures Manual.** This will detail reporting procedures and supporting documentation, communication and decision-making processes applicable to all work packages. This will ensure that the project aims and objectives are achieved under the rules and regulations of the LLP Leonardo TOI programme

Target group(s): Project Partners and other future project managers

Deadline: 31-10-2013

**2. Secure web-based project management system.**

Target group(s) Partners and the German National Agency and assessor(s)

Deadline: 24-10-2013

**3. Technical Prototype - transferred platform with transferred integrated tools for consultation in WP2.**

Target group(s): VET providers / business networks in each partner country

Deadline: 28-02-2014

**4. Transferred and adapted innovative operational support methodology (IOSM) - draft for consultation only.**

Target group(s) / potential beneficiaries

Deadline: 28-02-2014

**5. Consultation Report to include prototype consultation processes undertaken with guidelines, reporting methods and results.** Target group(s): Partners, VET providers and business networks. (At this stage, the report is primarily focused on providing information for developments in WP3. However, any key points for impact and / or sustainability will be incorporated into final reports under WP5 and WP6 - the latter being in all partner languages

Deadline: 09-06-2014

**6. Technical Prototype / Platform.** This will include the transferred and integrated tools on a web platform. After any adaptations made after WP4, this will become the final technical product. Target group(s) / potential beneficiaries VET providers and micro and small enterprise owners /managers and individual employees

Deadline: 31-12-2014

**7. User Guidelines for Result 6.** Target group(s): Partners, VET providers, MSE employers and employees

Deadline: 31-10-2014

**8. IOSM - innovative operational support methodology for working with small and micro enterprises in WP4 (initially).** Target group(s) / potential beneficiaries Partners and other VET providers

Deadline: 31-10-2014

**9. Promotional materials and evaluation tools for piloting in WP4.** Target group(s): MSEs and VET providers

Deadline: 31-10-2014

**10. Collated piloting report - common executive summary ( all languages) plus detailed, separate annexes targeting each specific partner country.** Target group(s): VET providers and business networks regionally, nationally and pan-EU, national and pan-EU policy makers

Deadline: 31-07-2015

**11. Case Studies (minimum 15) showing the impact of the integrated tools and IOSM on small and micro enterprises participating in the piloting.** Target group(s): VET providers and business networks regionally, nationally and pan-EU, national and pan-EU policy makers

Deadline: 01-06-2015

**12. Dissemination Strategy with SMART Action Plan. The latter will be updated at each Transnational Steering Group Meeting.** Target group(s): potential beneficiaries Partners

Deadline: 10-02-2014

**13. Sustainability Strategy with a focus on pan-EU as well as National, Federal, Regional and Local Opportunities. This will also include the final IPR agreement.** Target group(s): VET providers and business networks regionally, nationally and pan-EU, national and pan-EU policy makers

Deadline: 01-06-2015

**14. Final Project Conference to be held in Aachen.** Target group(s): VET providers and business networks regionally, nationally and pan-EU, national and pan-EU policy makers

Deadline: 10-06-2015

**15. Public-facing web presence-traditional website + social media**

Target group(s): All target groups

Deadline: 09-12-2013

**16. QA Framework with an overarching evaluation methodology supported by WP specific indicators.** Target group(s): Partners

Deadline: 10-02-2014

**17. Final Summative Evaluation Report a) Full (En) and b) summary in all partner languages with a focus on IMPACT evaluation.** Target group(s): VET providers and business networks regionally, nationally and pan-EU, national and pan-EU policy makers

Deadline: 28-08-2015

## **ANNEX 3**

### **Partner Questionnaire**

<b>TN2 Partner Survey</b>				
<b>Question</b>	<b>Yes</b>	<b>No</b>	<b>Comments</b>	<b>Rating</b> (0 – not at all, 1 – a little, 2 – not bad, 3 – good, 4 – very good, 5 – excellent)
Did you contribute to the Dissemination Plan? (Yes/no)				
Do you feel that you will be able to reach the organisations that you named in your part of the plan? (Yes/no, comments)				
What new support do you think the BOOST project offers your target audiences? (Comments)				
What do you think will be the most innovative aspect of the BOOST IOSM? (Comments)				
During the design of the BOOST prototype, do you feel you were given adequate information to contribute to decision making? (Rating and Comment)				
Were you able to contribute to the design of a) the BOOST platform prototype (Rating) b) The IOSM (Rating) c) the Pilot process (Rating) Do you feel your contributions were accepted? (Yes/no, comments)				
How useful was the Project Handbook? (Rating)				
Describe how you use(d) it. (Comment)				
Did you contribute to the content of meeting agendas? (Yes/no, Comment)				
How relevant are/were meeting agendas? (Rating)				
How easy do you find the BSCW to use? (Rating)				
Would you recommend the BSCW? (Yes/no, comments)				
How did you mainly communicate with partners? (List – put in order of usage)				
Do you feel that your views are/were listened to by the partnership? (Yes/no) How do you know? (Please give specific examples.)				
How relevant do you think the BOOST Tool and IOSM will be to your target audiences? (Rating, comments)				
Will your target audience be able to use the BOOST Tool easily? (YES/no, comment)				
What are the benefits of sharing BOOST and IOSM development with partners? (Comments)				

<b>TN3 Partner Survey</b>				
<b>Question</b>	<b>Yes</b>	<b>No</b>	<b>Comments</b>	<b>Rating</b> (0 – not at all, 1 – a little, 2 – not bad, 3 – good, 4 – very good , 5 – excellent)
<b>At the start of the project, how well did you understand what the BOOST Tool and IOSM offered your target audiences?</b> (Rating, comment)				
<b>Are you dissatisfied in any aspects of the BOOST platform and IOSM?</b>				
<b>Did you contribute to the content of meeting agendas?</b> (Yes/no, Comment)				
<b>How relevant are/were meeting agendas?</b> (Rating)				
<b>Following meetings, do minutes give a fair account of decisions made?</b> (Yes/no, comment)				
<b>Would you use Flash meeting outside the project if given the opportunity?</b> (Yes/no, comment)				

<b>TN4 Partner Survey</b>				
<b>Question</b>	<b>Yes</b>	<b>No</b>	<b>Comments</b>	<b>Rating</b> (0 – not at all, 1 – a little, 2 – not bad, 3 – good, 4 – very good , 5 – excellent)
<b>During the design of the BOOST prototype, do you feel you were given adequate information to contribute to decision making?</b> (Rating and Comment)				
<b>All partners contribute a variety of skills and knowledge to a project. What, in your opinion, are the 2 most useful and specific contributions that partners have made and helped you to complete the project.</b> (Comments on specific partner or the partnership as a whole)				
<b>How useful was the Project Handbook?</b> (Rating)				
<b>Describe how you use(d) it.</b> (Comment)				
<b>Did you contribute to the content of meeting agendas?</b> (Yes/no, Comment)				
<b>How relevant are/were meeting agendas?</b> (Rating)				
<b>How easy do you find the BSCW to use?</b> (Rating)				
<b>Would you recommend the BSCW?</b> (Yes/no, comments)				
<b>How did you mainly communicate with partners?</b> (List – put in order of usage)				
<b>Do you feel that your views are/were listened to by the partnership?</b> (Yes/no) <b>How do you know?</b> (Please give specific examples.)				
<b>Following meetings, do minutes give a fair account of decisions made?</b> (Yes/no, comment)				
<b>What are the benefits of sharing BOOST and IOSM development with partners?</b> (Comments)				

<b>TN5 Partner Survey</b>			
<b>Question</b>	<b>Yes</b>	<b>No</b>	<b>Comments</b>
			<b>Rating</b> (0 – not at all, 1 – a little, 2 – not bad, 3 – good, 4 – very good , 5 – excellent)
Did you reach all of the organisations in your Dissemination plan? (Yes/no, comments)			
In the light of your experience, would you change your Dissemination Plan? (Yes/no, comments)			
What do you think will be the most innovative aspect of the BOOST IOSM? (Comment)			
At the start of the project, how well did you understand what the BOOST Tool and IOSM offered your target audiences? (Rating, comment)			
Does the BOOST platform and IOSM meet your expectations? (Yes/no, comments)			
Are you dissapointed in any aspects of the BOOST platform and IOSM?			
During piloting, what did users say BOOST offered above what they already do? (open comment)			
Based on your pilot feedback of the BOOST Tool – what will it add to the participating organisations learning and skills solutions.			
Do you feel that your views are/were listened to by the partnership? (Yes/no) How do you know? (Please give specific examples.			
Would you use Flash meeting outside the project if given the opportunity? (Yes/no, comment)			
What was the best aspect of the partnership? (Comments)			
Were there any weak aspects to the partnership? (Yes/no, comments)			
How relevant do you think the BOOST Tool and IOSM is to your target audiences? (Rating, comments)			
Could your target audience use the BOOST and IOSM easily?			
Have you used the BOOST tools with your own colleagues? (Yes/no) If 'yes' – describe what you used. If 'no' – why not?			

