



LEarning Outcome-oriented quality mobility placements to gain
transparency and recognition of qualifications within the
Tourism and Catering field

(Grant Agreement No. 2013-1-IT1-LEO05-04022)

QUALITY MANAGEMENT & EVALUATION HANDBOOK

Handbook by
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1. Introduction and framework

This handbook has been created by *INIT Developments* for the *Leonardo da VINCI TOI* project *LEO quali-TC* (*LEarning Outcome-oriented quality mobility placements to gain transparency and recognition of qualifications within the Tourism and Catering field; Grant Agreement No. 2013-1-IT1-LEO05-04022*): and will assist in managing and bringing this multilateral project to a successful conclusion in a quality assured manner.

In addition to the applicant, Istituto Professionale di Stato per i Servizi Alberghieri e della Ristorazione "A. Saffi" (P0/IT), the following partners are participating in the project:

P1/IT - *FormAzione Co&So Network*

P2/AT - *Berufsforderungsinstitut Steiermark*

P3/DE - *IHK Projektgesellschaft mbH Ostbrandenburg*

P4/ES - *Escuela de Hosteleria de A Coruna "Alvaro Cunqueiro"*

P5/BG - *Vocational High School of Tourism "Dr Vasil Beron"*

P6/DE - *INIT Developments Ltd.*

Additionally, there are 17 associated partners from IT, ES, BG, DE and BE which support the project group in their various activities. They will mainly contribute to quality assurance and dissemination tasks.

In accordance with the project application (page 112f) the partnership has come together in order to achieve the following aims:

- Identify an operative framework to test ECVET and to facilitate the validation, recognition, accumulation and transfer of units of learning outcomes. In each country experiences and best practices in this field will be shared.
- Provision of concrete methodological tools to analyse and describe a range of vocational qualifications (EQF 2-3 levels – Tourism and Catering sector) in terms of units of learning outcomes and a model that will permit the validation, recognition, accumulation and transfer of units of learning outcomes with reference to the existing European tools (EQF, Euro-pass, ECTS) and principles (validation of non formal and informal learning, quality assurance) in order to reduce the barriers to mobility across Europe.
- Consolidation and integration of a sound partnership between stakeholders and National institutions responsible for VET qualifications systems across Europe enhancing cooperation and networking and promoting mutual trust, with the purpose of testing ECVET.
- Foster transferability of units of learning outcomes in accordance with the technical specifications of the proposal for Recommendation on ECVET and to test the ECVET mechanism through validation, recognition, accumulation and transfer of units of learning outcomes to

facilitate professional and geographical mobility of specific target groups (learners in IVT and learners with special needs) at Levels 2 and 3 EQF.

- Practical testing of comparability of learning outcome units and the processes of assessment, validation and recognition.
- Relative weighting of units of learning outcomes, with regard to the qualifications and their equivalent EQF levels (and where possible NQF levels), will be associated to credit points. For qualifications which do not have a formal learning pathway reference, credit points will be allocated through estimation by comparison with other qualification formally recognised.

To achieve these aims the project group has 24 working months and has allocated the time resource available into 11 work packages. The total project budget amounts to EUR 399,374.29, of which the *European Commission* has funded EUR 299,530.71 (=75%) and the partnership has provided from its own resources a total of EUR 99,843.58 (=25%). The allocation of the budget within the partnership is as follows:

Fig. 1 Overall budget

	Costs								Financing								
	Direct costs						Indirect costs	Total project expenditures		Community grant requested from LLP		Other sources		Total project revenues			
	A. Staff costs	Operations				B. Total operational costs										Total direct costs (A + B)	Total indirect costs (up to 7%)
		1. Travel and subsistence	2. Subcontracting (up to 30%)	3. Equipment (up to 10%)	4. Other												
%	56.73%	23.75%	13.67%	0%	5.86%	43.27%	100%	7%	100%		75%		25%	0%		100%	
Total	211752.00	88630.00	51025.00	0.00	21860.00	161515.00	373247.00	26127.29	399374.29	100%	299530.71	100%	99843.58	0.00		399374.29	100%
P0	54200.00	13160.00	44225.00	0.00	5710.00	63095.00	117295.00	8210.65	125505.65	31.43%	94129.24	31.43%	31376.41	0.00		125505.65	31.43%
P1	35630.00	12920.00	1000.00	0.00	1410.00	15330.00	50960.00	3567.20	54527.20	13.65%	40895.40	13.65%	13631.80	0.00		54527.20	13.65%
P2	21950.00	14680.00	0.00	0.00	3410.00	18090.00	40040.00	2802.80	42842.80	10.73%	32132.10	10.73%	10710.70	0.00		42842.80	10.73%
P3	38240.00	14940.00	2600.00	0.00	5410.00	22950.00	61190.00	4283.30	65473.30	16.39%	49104.97	16.39%	16368.33	0.00		65473.30	16.39%
P4	36330.00	15000.00	2000.00	0.00	3410.00	20410.00	56740.00	3971.80	60711.80	15.2%	45533.85	15.2%	15177.95	0.00		60711.80	15.2%
P5	12417.00	15100.00	1200.00	0.00	2510.00	18810.00	31227.00	2185.89	33412.89	8.37%	25059.66	8.37%	8353.23	0.00		33412.89	8.37%
P6	12965.00	2830.00	0.00	0.00	0.00	2830.00	15795.00	1105.65	16900.65	4.23%	12675.49	4.23%	4225.16	0.00		16900.65	4.23%

By means of these human, time and financial resources the partnership seeks to develop the following main products (in chronological (!) order of the project implementation; data were taken from the original application but also updated and approved together with P0):

Fig.2: List of products / deliverables

Product/Deliverable:	N° of Deliverable in application	Deadline/ period of implementation	Language versions
Quality Management Handbook	11	11/2013	EN
Project Website	14	11/2013	EN
Project Newsletter 1	18	12/2013	EN
Quarterly Partnership reports 1 - 8	1-8	12/2013 and afterwards every 3 months	EN
European Survey	20	01/2014	EN
Quarterly Newsletter 2-8	19	02/2014 and afterward every three months	EN
First Year Quality Report	12	06/2014	EN
ECVET Model for Tourism and Catering	21	07/2014	EN, IT, BG, DE, ES
Memorandum of Mutual Understanding	22	07/2014	EN, IT, BG, DE, ES
Certificate	23	07/2014	EN, IT, BG, DE, ES
Folders, leaflets etc.	16	09/2014	EN, IT, BG, DE, ES
Posters	17	11/2014	EN, IT, BG, DE, ES
Interim Report	9	11/2014	EN
Second Year Quality Report	13	07/2015	EN
Workshop Test Report	24	08/2015	EN
Mobility Test Report	25	08/2015	EN
Project Meeting Minutes 1-6	27	Shortly after each project meeting	EN
Exploitation Report	15	09/2015	EN
Final and published version of the LEO quali-TC Handbook	26	09/2015	EN, IT, BG, DE, ES
Final Report	10	11/2015	EN

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In addition to these main results defined in the application form there are also a large number of accompanying and secondary products (for a detailed overview of all project activities see the evaluation instrument *snapshot analysis*, created specifically for this project; see also 3.1.1)

The management of the multi-layered and complex working processes and the coordination of the interaction between the different resources place high demands on the entire project group, in particular on the project coordinator (P0).

In order to be able to implement the project as quality-assured as possible in all of its facets and at all levels, a dedicated *work package (WP 2 – Quality Management and Assurance)* was defined and entrusted to P6. As one of the first tasks in this context, this *Quality Management and Evaluation Handbook* has been created by the P6, the Germany-based company *INIT Developments Ltd.*, specifically for the *LEO quali-TC* project. It describes all fundamental contents, procedures and results of this work package, with relevant quality indicators and standards, and links them with the strategic and operational aims of the project.

In accordance with the methodological focus of the project evaluation specifically created for *LEO quali-TC* a number of evaluation instruments have been developed and adapted to meet the particular requirements of this project. Following a clear implementation plan various experts can obtain data concerning the different levels and areas of the project by means of the different *methods* and *instruments* at various milestones *during* the project. Also the production, processing, documentation and interpretation of the data records have been clearly planned and are presented in this handbook.

An important component is represented by the quality indicators, identified by *INIT* - in cooperation with P0 - which represent the evaluation of the different areas of the project more transparently and in addition allow a modular evaluation approach. It has been attempted to arrange the numerous quality indicators according to priorities and areas of application as well as clustering an overview of indicators series, e.g. lists, charts etc.; if necessary one or more indicators can be exchanged in any set, without the overall character of the evaluation suffering.

Before providing further detailed explanation it is recommended to provide some general information about the principles and standards of this project evaluation.

2. The QM-concept: criteria, experts, objects

2.1 Criteria-based evaluation

An appropriately high quality of the different main products is certainly one of the most important prerequisites which is expected for the successful and sustainable implementation of EU projects. Therefore substantial quality differences between the individual products and areas of the project are to be avoided, and the individual contributions should all aim to be carried out at the same highest quality level possible. This however can only be ensured when the starting points of the project - the *application* as well as the *partnership* - are of an appropriate quality and when this is maintained throughout the entire duration of the project.

The quality management concept should support the partnership with this undertaking, whereby it is generally - not only with transnational cooperation projects - advisable to opt for as transparent, independent and holistic an approach as possible. Within this context the expectation of a high-quality QM-model is to assess and measure the current project *status quo*, its implementation dynamics, its target group relevance as well as the overall orientation in relation to the aims, ensuring the original - e.g. in the project proposal - agreed objectives and plan are adhered to. If these requirements are fulfilled then much will already have been achieved and important prerequisites for the quality-assured implementation of the project will have been dealt with. What even the best QM-model cannot perform however is making concrete deductions and decisions based on the data that has been produced and evaluated. This responsibility remains, as ever, with the persons involved, e.g. the project management, project group, external/internal QM-experts, the *National Agency of the Lifelong Learning Programme* in Italy, etc.

Should any deviations from original plan be identified then it must firstly be clarified whether the deviations can be explained and whether they are meaningful to the project development, or even necessary. Only if they actually prove to be unfavourable to the project should appropriate (counter) control and adjustment actions be discussed and ultimately carried out. If it turns out however that the deviations bring about more benefit than damage to the project, then it is more

than reasonable to allow the deviations and to consider them in response to the relevance and validity of the original project plan. If this no longer stands up to careful examination, the defined "working hypotheses must be rejected" - because on closer inspection they are different to the individual parts of the project proposal - and be formulated again from scratch. How this happens in detail, e.g. by an internal resolution of the partnership, the informal notification of the *project officers* or an official *amendment* to the original *agreement* with the *Italian NA*, depends very strongly upon the framework in relation to individual cases as well as the guidelines of the respective funding (sub)programme.

In order to deal with all of this a successful quality management model should be based on specific *quality criteria*, which not only apply specifically to *LEO qualiTC* but which possess generally validity for *European development projects* or other transnational cooperative undertakings. EU projects, like other socially organised, dynamic development processes, follow certain basic principles which partly have a character based on the laws of nature. In order to successfully operate in this sphere, QM-models must themselves be measured against various quality features and standards. The most important of these can be characterised as follows:

2.1.1. *Scientific and methodological correctness*

A quality assurance model for an EU project must be *well crafted*. That means in terms of its approach, but also in relation to the selected methods and instruments used it must strictly be able to take into account the requirements of empirical social research, such as *reliability*, *validity* and *objectivity* (see. e.g. Neuman, W. Lawrence: *Social Research Methods* (2006): *Qualitative and Quantitative Approaches*'. 6th edition. Allyn & Bacon; Atteslander, Peter (2008): *Methods of Empirical Social Research*. 12th edition Erich Schmidt. Berlin). The results of an evaluation process are only really valid, comparable and meaningful, if *model*, *methods* and *instruments* are orientated towards these criteria.

It must however be taken into consideration that within the context of a European Union project there is hardly any time nor financial resources available for data collection and analysis work at the highest scientific level; besides most of the people involved in the evaluation processes are

not familiar with the methods and quality standards of empirical social research, and therefore it is a significant challenge for the evaluator to undertake evaluation work across several countries at the same time from a significant geographical distance and partly with cooperation partners who lack expertise. Finally it also needs to be clearly considered and decided upon whether and when the subject of the evaluation justifies the cost of comprehensive scientific data collection, e.g. to what extent the partners were content with a seminar room or a hotel room does not necessarily require time-intensive and thus expensive qualitative interviews to be undertaken.

As in other situations with empirical social research, the QM-experts in EU projects also face the dilemma of balancing scientific standards and their quality requirements against the realities of what is possible within the project implementation - defined by the factors *time, money, personnel, access to data* and *information etc.* - and having to align with the objectives of the data gathering. With EU projects very often data gathering and analysis is concluded at a relatively *simple* level, which does not necessarily mean however that it is of *poor quality* - moreover the opposite is true: while the level is generally a simple one and the expectations are limited the evaluation work must be fundamentally correct and of good quality in terms of its methodology.

2.1.2 Transparency

A high degree of transparency concerning any activity within the framework of process, product and dissemination / implementation evaluation (beginning with the concept design, through the data generation and analysis and then with the resulting recommendations for action) is essential and a basic condition for high quality QM-work, which is not open to discussion. The importance of transparency is based upon several factors:

- Evaluation can only be successful if all relevant parties (project group, pilot course participants, external experts etc.) participate cooperatively and with a spirit of mutual confidence in the evaluation process; this can only be ensured - particularly during a longer

period - if all those taking part are informed in a transparent manner about the concept, procedure, results and consequences of the evaluation and if they have unrestricted access to the data and the results.

- The basic requirement of QM-work is to lead or guide a pre-defined working and developmental process to an optimal conclusion. "Optimal" is in this regard a semantically very broad concept and its meaning depends very strongly upon the perspective of the respective observer; the same project result can be viewed completely differently by the *project manager*, *project partner*, *promoter*, and *end user*, potentially being assessed (=evaluated) in conflicting ways. A high quality evaluation concept must take account of this, and clearly communicate at the start from which perspective the evaluation is being carried out, which quality standards, indicators and parameters are being used as benchmarks and what ultimately it is intending to achieve. Accordingly the QM-concept must be sufficiently transparent for all parties, so that they and their requirements can be found - only then can it be considered to represent the interests of all involved.
- The most important aim of QM-work is to derive the necessary resolutions for action and then implement them. Said more simply, the essential structure of any scientific work underpins the QM-process, as the product evaluation *of this project*, for example, highlights: a *working hypothesis* (in the case of *LEO quali-TC* the transfer of an existing model into a new learning environment and into new learning languages and cultures) *is formulated* (= project proposal) and is then converted into the individual *postulates* (=working steps / packages), which flows ultimately into the development of the *training course*. During a *test phase* the original working hypothesis is examined for its *validity*, which can lead to three different results: a) it *is confirmed* (= the model is accepted without changes); b) it *is reformulated* (= the training course is accepted in an adapted form or is postulated anew) or c) it *is com-*

pletely rejected (= the development of the training course is not continued, meaning it does not enter the education market).

This is the central task of the QM and applies to the main products of the project as well as to other *topics* and *areas* of the evaluation: It applies in terms of triggering concrete actions that benefit the project, whereby it must be taken into consideration that - purely in sociological terms - the *omission of an action* also represents an *action*, (if, for example, the evaluation shows that the *working hypothesis* is correct and does not require any changes to be made, then the *action* derived is not to undertake any further action). This is naturally more easily said than done, because the crux is in the detail - which actions are actually triggered, such as how its *quantity, quality, direction, intensity, duration* etc. look, which areas relate to it in which form, in which individual steps they are undertaken, who is responsible for it when and how etc. The contents and result of the complex processes as well as scientific analysis must ultimately be implemented by actual participants (usually the project partners). In order that they - given that most are not experts in the field of *quality management* - derive as clear a set of procedural instructions as possible with which they can subsequently orientate themselves, the highest possible degree of transparency is absolutely essential during the data gathering and evaluation.

2.1.3 *Holistic approach*

As is already evident from the first two points, the QM-work in an EU project is concerned with the complex realities, which occur at different levels, which can be viewed from different perspectives, and their quality changes depending upon the approach and the observer. It is obvious that such complexity cannot be captured exclusively by using *one* method or *one* instrument. As previously mentioned, with regard to the requirements as well as the available resources, the evaluation of EU projects is very limited, nevertheless a good QM-model must be based strictly upon a *holistic* approach. Only an appropriate *method-mix*, the application of different *in-*

struments, the definition of different *benchmarks* and *periods* as well as the involvement of different *experts* will allow as many levels and perspectives as possible to be taken into consideration and result in as many relevant outcomes as possible.

The model available here takes these requirements into account, as:

- all relevant project levels are subject to the evaluation work (see *section 2.3*)
- different methods, both with more quantitative as well as more qualitative origins, are used (*standardised written and verbal questioning / interviews, non-standardised questioning, peer group analysis, participating observation, non-participating observation, source data analysis, secondary data analysis etc.*)
- different instruments are employed (*questionnaires, interview guidelines, checklists, data gathering and observation sheets, matrices etc.*)
- different experts - depending upon relevance and expertise - are included in the evaluation process (*project lead organisation, project partners, external evaluators, representatives from the different target groups, education / socio-political decision makers and stakeholders, trainers and pilot training course participants, internal evaluators and, if necessary, staff from Italian NA etc.*)

2.1.4 Feasibility

Although the scientific aspects and standard must not be neglected, a QM-model must equally also be implemented - and in several respects:

- first of all it must be aligned with the available financial, personnel and time resources and achieve reliable results and target-orientated (see below) deductions to be actioned.
- secondly it must be relatively simple to use and quick to understand; many people within the context of EU projects entrusted with evaluation tasks, e.g. with the organisation and evaluation of

pilot training in individual partner countries, have had no training at all concerning empirical social research and data gathering, and there is neither time nor money to give them any comprehensive training. Therefore the different evaluation procedures need to be easy to grasp and evaluation instruments must be simple to use. This means that the QM-model and the instruments employed can have a complex and well thought through background, but at the surface they must *appear* clear and simple.

- thirdly, a QM-concept must take into consideration that its strategic planning as well as its operational implementation will occur from a distance; both are the result of transnational cooperation work by participants, who often live and work thousands of kilometres from each other and during the average two year course of a project they only meet each other in person on four or five occasions at two-day project meetings. This *question of distance* places significant demands upon a QM-concept, such as the ability to be implemented without comprehensive personal control by the evaluation expert responsible (usually an internal or external evaluation expert) or the data gathering and data transmission is processed across a large geographical distance, partly by employing ICT based aids.

2.1.5 The European dimension

Naturally a QM-concept for EU projects must exhibit the criterion of having a sufficiently *European dimension*. It must be applicable to different cultural areas with different traditions, experiences, approaches and standards of quality assurance in data gathering, data analysis and data interpretation. It must above all be sufficiently *open* and *flexible* in order to record and reflect Europe's different realities, which are often not known until the data collection commences. Particularly with target group and content based *status quo* analysis and similar exploratory studies at the transnational level then a more fundamental and *qualitative* oriented research approach is unavoidable (see. Nigel Fielding, Margit Schreier: *On the Compatibility between Qualitative and Quantitative Research Methods*. In: *FQS - Forum qualita-*

tive social research. 2nd issue 1, February 2001, 4). Finally one must be prepared with the development of the instruments that they will be translated into different language versions, not always by specialists, so they still need to function sufficiently well in order for essential results to be obtained.

2.1.6 Target orientation

All of the quality criteria previously described should feed into the highest premise of the *target orientation*. Many of the QM-models developed for EU projects run the risk of not progressing beyond an *Art pour l'art-Qualität* - their only purpose seems to be the superficial meeting of the quality requirements which are anchored in the project proposal. They do not seek to quality assure EU projects *in practice*, but rather they want external observers, above all the evaluators from the funding agencies, to believe that this has happened. The fact that this happens more often than is frequently accepted is of little surprise to experts with many years of experience in this area. However this is not the case with the quality requirements for this particular project. Naturally it is important to convince the evaluators from the promoting agencies of the *quality* and *quantity* of a project's evaluation work but it does not mean that time and effort should be invested in constructing *Potemkin evaluation villages*. Primarily the collection, evaluation and analysis of data and information at all levels of the evaluation must serve clearly defined goals for the strategic orientation and operational implementation of the project. As has already been explained above, the data collected must be sufficiently valid and reliable, so that it can be used as a solid basis for deriving *recommendations for action*. Permanent *action*, understood as conscious *implementation* or also the conscious *omission of an activity (action)*, is the central element of the dynamic process of EU project management. There are many consciously observed and innumerable unconsciously experienced moments, in which a project group, within the context of an EU project, must decide one way or the other *what form of action to take* for the *direction, intensity, duration, quality* and *quantity*, in order to more or less achieve a consciously set *target*. Offering the project group at least a basis for decision making

in terms of the most important of the *target orientations* should be the primary motive of all evaluation work within the context of an EU project.

2.2 Definition of the evaluation expert

In order to also be able to ensure that all perspectives and opinions of experts for the different levels and areas the project are included in the quality assurance, the different experts are involved in the evaluation activities.

Basically we assume that the greatest expertise with respect to the project is to be found within the project group; this applies not only to the process-technical areas of the project but also to its content: in the project proposal it was argued in detail, upon which considerations and requirements this particular project group was established, whereby criteria such as *authenticity regarding the project topic, access to the project target groups, educational content and methodological knowledge, international project experience, educational and socio-political networking and European dimension* played an important role; additional indicators such as *integrity, professionalism and work ethic* and the responsibility of being a project organisation were not expressly mentioned, but were assumed as a *conditio sine qua non* for each project participant. From this cumulative collection of experience and expertise it can be derived that the project group will play an important role in nearly all areas of the evaluation.

Even when sufficient competence and experience within the project group is a condition for a successful project evaluation, this cannot cover all areas ranges and facets. It is absolutely necessary to bring in a certain external perspective in order to prevent *adopting a blinkered approach*, to increase the target group relevance, to fill gaps in know-how and expertise and for the results of the internal evaluation to be externally examined. Therefore during the course of the project *external experts* are involved again and again in the evaluation activities. Particularly concerning the *target group orientation, market relevance* and the *sustainability potential* of the main products, relevant experts (representatives of *primary and secondary target groups, end users, educational and socio-political stakeholders, academics etc.*) are asked for their assessment and opinions.

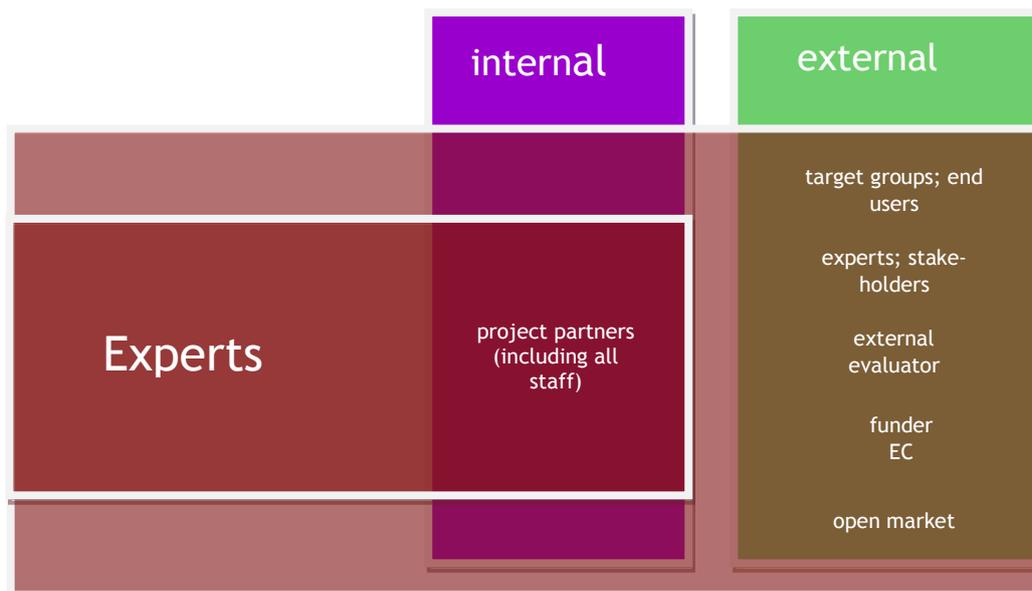
With regard also to the technical and organisational quality standards within the area of *project management* it is planned to involve external experts for their

advice and evaluation; finally we are also aware that the *Italian NA*, with its two evaluation activities, *interim and final report*, is a part of our evaluation concept.

Although the evaluation concept for the *LEO quali-TC* project is very comprehensively applied and many internal as well as external experts have been taken into consideration, the most important and, in the long run, only relevant evaluation activity with regard to the product quality will be made by another group of external experts after the duration of the project has ended: On the open market in the individual countries it will be evident whether the *LEO quali-TC* training course will be demanded by or offered to the end users and target groups. Only here will it be shown whether the quality of the content, the target group relevance, the pedagogical-didactical development and the European as well as the national dimensions have been sufficiently achieved so that the training course can establish itself on the open education market. This evaluation does not follow any standardised procedures or methodological guidelines, but rather it is *more concrete, more relevant and more uncompromising than all other evaluation activities combined*.

The QM-concept for the *LEO quali-TC project* cannot anticipate or directly influence the results of this *real life evaluation*, but it can help to create the best possible conditions for a positive evaluation by the open market.

Fig. 3: Evaluation experts



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The number, profile and selection of different experts as well as the intensity of their involvement varies from project to project and must be clearly specified in each one. In addition in some cases a random sample of the experts involved must be carried out, which in empirical social research and related sciences is an immensely complex, lengthy and thus more costly process, e.g. with election forecasts or product launches; in the *LEO quali-TC* project this problem with the evaluation of the project products is addressed in section 3.2. (see below for a more precise description).

2.3 Object of the project evaluation

It is extremely difficult to comprehensively, authentically and logically represent all possible objects in a project evaluation. Their numbers are simply too large, their forms are not coherent enough and their interaction is too complex. Within the technical literature there are hardly any reference points to define these objects, according to which criteria they should be selected and considered as well as with which thematic groups they should be combined. It is thus very hard to select from the almost infinite number of possible evaluation topics those which are most relevant and meaningful for a positive project implementation. There is a danger of including the wrong or irrelevant selection of evaluation topics or defining them incorrectly in terms of quality and quantity. The selection of the correct number of evaluation objects represents a significant challenge to the project group: if the number is too small the quality of the evaluation results will suffer as well as the requirement for a *holistic approach*; if it is too large the evaluation concept will become almost uncontrollable and will infringe upon the *criterion of feasibility*. Figure 5 illustrates the first form of guidance for a fundamental schematic representation of the six central data areas, under which, according to our understanding, most evaluation topics can be subsumed:

Fig. 4: Objects of the evaluation

Proposal (already evaluated by the EC)	Partnership (already evaluated by EC)	Process	Products	Dissemination	Sustainability
General project idea	Composition	Technical implementation of work plan	Project idea	Dissemination plan	Quality of project products
Innovation	Number	Contract management	Pedagogic quality	Media used (e.g. project website, flyer, poster, conferences, seminars, print media, TV, Internet etc.)	Adaptability on national/regional level
Market needs	Authenticity	Work atmosphere	Market and target group Orientation		
Target group orientation	Competence	Project Meetings	EU orientation	General public reached	commitment of stakeholders and political decision makers
European value	Size	Cooperation between project meetings	Usage of appropriate media		
Added value	Area of activities	Information/communication flow	Number of publications	Target groups and stakeholders reached	Intellectual property rights
Work plan	Geographic dimension	Time management	Language versions existing		
QM plan	Quality of performance and services	Quality Management	Technical quality of products	Involvement of project partners and countries	Marketing strategy
Dissemination plan	Reliability	Conflict management	Quality assurance and testing	Dissemination outside partnership	Efforts and motivation of project partners
Budget	Contact to target groups and stakeholders	Administration, reporting and cash flow	Potential of real usage		
Etc.	Etc.	Etc.	Etc	Etc.	Etc.

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It becomes evident that two relevant areas of evaluation objects, the *proposal in all its parts as well as the partnership*, have already been evaluated within the context of the application process by the *Italian NA*, that this by their own external appraiser. This is of importance insofar that these areas do not need to be fully addressed again by the QM-concept during the project implementation; this helps save resources and allows efforts to be concentrated more intensively on other areas. This does not mean however that the *project proposal* as well as the *partnership* are not of any further relevance to the positive running of the project; they still represent the foundation of this project and are given further con-

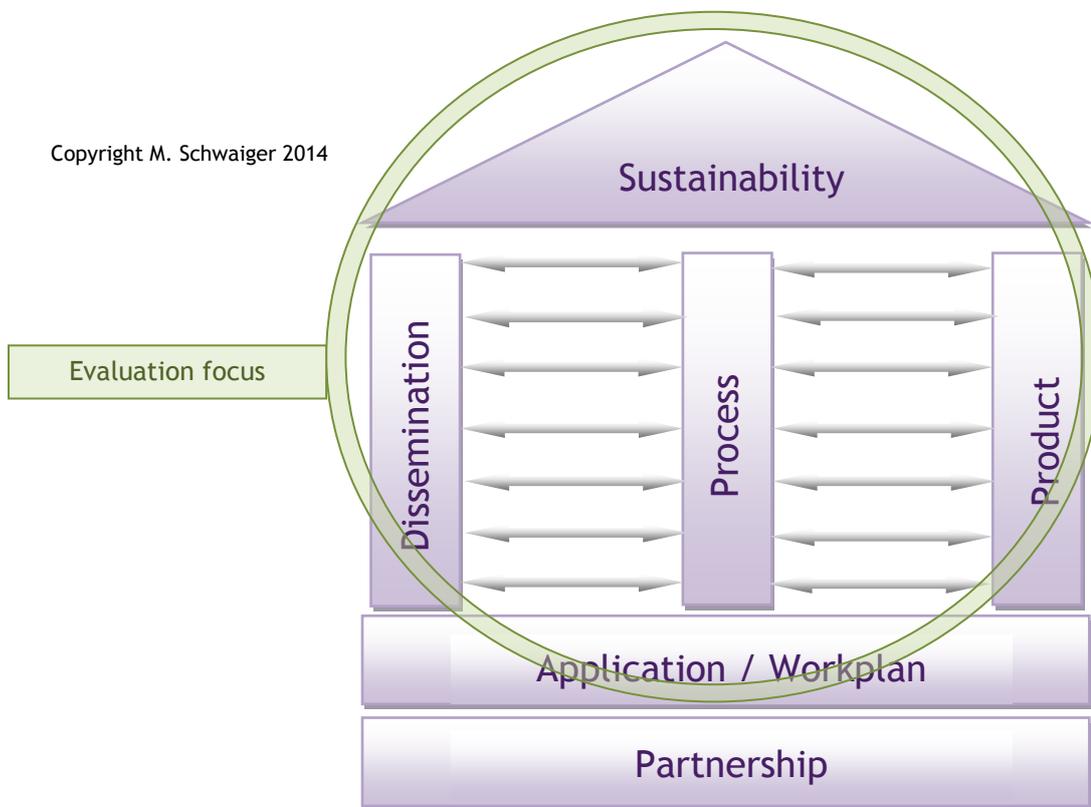
sideration by the ongoing evaluation activities - however not with the same intensity as the areas, which will not yet have been quality assured at all.

This reduction allows us to focus on the following central evaluation topics:

- *process level*
- *product level*
- *dissemination level*
- *sustainability level*

In summary the interaction and dependency of the project's different evaluation levels can be represented as follows:

Fig. 5: Interaction of the evaluation levels and focus of the evaluation;



Following the principles of the *holistic approach* and *scientific correctness*, INIT developed an evaluation model aligned and applicable to these areas, and which is based on the *measurement principle of triangulation* (see Uwe Flick: *Triangulation: An introduction*. 2nd edition VS Verlag, Wiesbaden 2008; Jennifer Greene, Charles McClintock: *Triangulation in Evaluation*. In: *Evaluation Review*. issue 9 5, 1985, pages 523–545). This procedure, which originally stemmed from geographical location fixing, works on the basic assumption that one's *own point of view* can be determined better if many different perspectives and procedures of an appropriate quality are used. Be-

cause this approach does not lack a certain logic it has been incorporated into empirical social research, and consequently it has also been applied to our QM-concept. From this several conclusions can be derived for the evaluation of the project:

- a) in order to be able to determine and evaluate the condition of the project in the best possible way all relevant levels are included in the evaluation (*process, product, dissemination and sustainability levels; principle of the holistic approach*)
- b) to determine the condition of the project different procedures and instruments are called upon (see 3.2.1; 3.2.2)
- c) the assessment of the project's condition is carried out at various milestones and times (see Tab. 27)
- d) the necessary data for assessing the condition of the project is generated from different sources (see 3.2.1 - 3.2.4)
- e) the measurement and interpretation of the data as well as the appropriate action derived is performed by different persons (see 2.2; 3.2.3)

The developed *QM-model* works with so-called *Relevant Quality Indicators (RQI)*, which are on the one hand predetermined due to their general validity, and on the other hand are defined by the various experts (evaluator, project partners, target groups etc.) so that they are tailored towards each project. The *RQIs* can be similar or completely different to each other depending upon the project level and the project's specific requirements, however usually they will not be mutually exclusive.

The measurement principle of triangulation implies that all four dimensions are closely interwoven with each other and their combined analysis makes a holistic perspective possible. Furthermore, the method developed by *INIT* satisfies the previously stated issue of *transparency*, because all project partners have access at any time to the data upon which the evaluation is based.

The main benefit of the quality assurance method is that it helps in assessing the current *status quo* of the project in terms of its different manifestations and to contrast it with the aims set in the project plan or with other quality standards. The method makes it possible to recognise any deviations immediately and al-

lows deductions to be made, which will activate control mechanisms to keep the project on the correct course and to secure high quality standards.

The extremely important questions for the evaluation of the *method-mix* applied, the *instruments* used, and the sequencing of the different evaluation strands, will be addressed in the following section, which is dedicated to the actual work at the individual evaluation levels.

3. Evaluation of the project levels, methods, instruments and measuring points

3.1 Level 1: quality assurance during the project process

We have already stated that the implementation of an EU project is a very complex and multi-layered venture. One of the most important elements, if not the most important, is the *project process* in its narrowest sense, that is the course of the project in all of its technical and administrative, as well as social, communicative, organisational, cooperative and coordinating aspects. They are closely connected with each other and determine each other; however it is difficult to consider each of them in isolation. With some components of a more technical and administrative nature this is achieved more easily, e.g. whether the *partner contracts* are concluded to an appropriate level of quality, whether the partners received their funding tranches on time, or whether the number of project meetings carried out equals what is stated in the proposal. However the scientifically based investigation of other components, e.g. the quality of the communication between the partners, the management quality of the lead organisation or the commitment and motivation during the *project* implementation, would, for one single project, occupy a whole host of sociologists, psychologists and other experts for many years without them being able to reach any significant conclusions. Naturally the demands on the process evaluation of an EU project can and will not meet such requirements. The process evaluation is rather more concerned with defining fundamental key factors at the process level together with the partnership and in obtaining vital information about the different methods and instruments, to establish whether they are regarded positively. If the result of the assessment should prove to be satisfactory then actions can be undertaken in order to maintain this situation, and maybe even to further improve it. If the result should give cause for concern, then essential actions to fundamentally re-orientate one or more factors will need to be undertaken. In a purely academic sense one is acting here very much on thin ice *without sufficient scientifically secure data*; in the somewhat more reality-based and rapid world of project management there are hardly any alternatives to predetermined framework setting and procedures. There remains little else but to work with unreliable data, but nevertheless obtaining a great many formal as well as informal sets of

evaluation cycles, the application of acquired specialist competence and knowledge from life and professional experience as well as a sound measure of intuition for actions in terms of a *positive project implementation* - likewise very much a *comparable* target! - can be achieved.

In this project the *project process* is examined by two large evaluation strands, which both extend throughout the entire course of the project. The first focuses on the technical-administrative areas, whilst the second covers more extensively the management orientated and social components. Both perspectives combined should guarantee a secure project implementation.

3.1.1 The snapshot analysis (deviance analysis)

The so-called *snapshot analysis* helps to draw a comparison between the targets in the *project proposal* and other *quality guidelines* with the actual *progress of the project*. This occurs based on the following considerations:

- the project process set out in the proposal is originally accepted as the optimum way of achieving the aims of the project; the actual course of the project must then be measured against this default process, in order to ascertain the correctness of the approach, or to gain confirmation of the need to modify it (= deriving decisions for action)
- each individual project step should not only have a strategic and operational purpose, as it also involves costs. Project expenditure can only be justified if the individual project steps are kept approximately within their quantitative and qualitative default limits.
- every other evaluator of the project - above all the evaluators from the *Italian NA* - will likewise compare the actual results and operational course of the project with the original proposal in order to derive quantitative and qualitative statements regarding the progress of the project. If the project group adopts this approach in its internal evaluation process from the start and achieves positive results, then the probability is quite high that the outcomes of the external evaluators will also be positive.
- the *snapshot analysis* has the additional advantage that its underlying instrument represents clearly and in chronological order all individual *proc-*

esses, activities, results, deadlines and partners' responsibilities. The application documents from the funding programmes do not normally ask for such detailed overview plans and all relevant information is "hidden" in different places within the proposal document, e.g. a general project description, description of work packages, description of the project results, dissemination plan, QM-plan etc. It is therefore a great help for all involved in the project - primarily for the project lead organisation - if the entire course of the project with its steps is detailed and listed chronologically. Thus a management instrument for project lead organisations and partners is developed alongside the evaluation instrument.

The first step towards the creation of the snapshot analysis is therefore the transfer of the entire project proposal with all its facets and processes into a new document represented in fig. 6.

This document possesses the character of a checklist and is constructed as follows: on the left hand side of the instrument under "nominal results" all project steps, results and products are specified in chronological order and defined by relevant indicators; on the right hand side of the instrument there are three status columns, in which symbols and coloured shading for each step can be recorded to note whether this step is already underway, (👉) has already been completed (☑) or could not be carried out due to a particular reason; (☒) there is an additional column to note the degree, in percentage terms, to which each individual step has been achieved. Finally there is space available in the last column for comments or notes.

Fig. 6: Evaluation instrument - snapshot analysis / LEO quali-TC – page 1

LEO Quali TC - WORKPLAN
 work plan, evaluation, dissemination and valorisation activities
 Status quo: 12/2013

NOMINAL RESULTS							ACTUAL RESULTS		
Results/ Outputs	Quantity/Frequency ¹	Language ²	Pages/ Volume/ Duration	Medium	Partner/s in charge ³	Start - End	Status ⁴	% ⁴	Comments
Work plan and snapshot analysis grid	1	EN	NA	Work plan quality management tool word/pdf file	P6	10/2013	<input checked="" type="checkbox"/>	100	<ul style="list-style-type: none"> Work plan based on chronological listing of all project activities Allows measurement of technical and administrative development of project Allows comparison of project's actual status quo with requirements of the original proposal
Partner meeting 1 AT	1	EN	NA	Project meeting and workshops	All partners	10/2013	<input checked="" type="checkbox"/>	100	<ul style="list-style-type: none"> Presentation of all partners Presentation and discussion of project's objectives, aims and results in total Settlement of administrative, financial and contractual issues Planning of further steps and developments Implementation of Dissemination Start-up Workshop
Meeting Minutes 1 / AT (Result 27a)	1	EN	NA	Text file/report Website	P0	shortly after meeting (by mistake indicated with 09/2015)	<input checked="" type="checkbox"/>	100	<ul style="list-style-type: none"> Minutes as result of each of the 6 project meetings. These will be online right after the meeting so the partnership can refer to decisions taken.
Partner contracts	6	EN	NA	Bilateral contract paper signed in 2 original versions	P0 with each individual partner	11/14	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> Contract setting all duties and obligations of promoter and partner organisations (including payments, money flow, deadlines etc.)
Quality Management Handbook (Result N°11)	1	EN	NA	Text Website	P6	30/11/2013	<input type="checkbox"/>	80	<ul style="list-style-type: none"> The quality assurance 'handbook' will be updated throughout the whole project duration to allow inclusion indicators if necessary.

Legend:

1 Indicates in which quantity a results gets produced or in which frequency it takes place

2 Indicates in which language versions a results is available or gets performed

3 P0 = IPSSAR "A. Sae" (IT), P1 = FCN (T), P2 = B. Beiermann (AT), P3 = IHK Ostbrandenburg (DE), P4 = Escuela de Hosteleria de A Coruña "Alvaro Cunqueiro", P5 = Vocational High School of Tourism "Dr. Vassil Beroz",

P6 = INIT (DE)

4

= fulfilled = pending / in progress = not fulfilled / cancelled = not yet started

In *fig. 6* the first page of the *LEO quali-TC* snapshot analysis is shown, which was developed by *INIT* and its contents were completed together with the project lead organisation. The development of this document is orientated towards the following *Relevant Quality Indicators (RQI)*:

Fig. 7: Relevant quality indicators - series 1

RQI 1: process level 1 – snapshot analysis				
RQI_1.1	Consideration of all planned and necessary project steps			
RQI_1.2	Adherence to chronological progression (technical planning)			
RQI_1.3	Adherence to content related progression (technical planning)			
RQI_1.4	Adherence to a logical progression (technical planning)			
RQI_1.5	Multiplicity of the project steps			
RQI_1.6	Language requirements are taken into account			
RQI_1.7	Consideration of the quantitative requirements			
RQI_1.8	Selection and use of relevant methods / media			
RQI_1.9	Selection and use of attainable viable methods / media			
RQI_1.10	Clarification of division of responsibilities			
RQI_1.11	Adherence to the timescales			
RQI_1.12	Completion of partner contracts on time			
RQI_1.13	Payment of funding tranches to partner in accordance with the contract			
RQI_1.14	Adherence to chronological progression (operative)			
RQI_1.15	Adherence to content related progression (operative)			
RQI_1.16	Adherence to logical progression (operative)			
RQI_1.17	Timely identification of unintended deviations from the project plan			
RQI_1.18	Timely identification of necessary deviations from the project plan			
RQI1_.19	Appropriate crisis management in case of deviations			
RQI1_.20	Appropriate modification of the project plan in the case of deviations			

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With the help of the instrument illustrated in *fig. 7* P0 and P6 are able to produce an update, approximately every three weeks, highlighting the progress made - the so-called *snapshot of the project!* As a result it will be evident at which proc-

ess-technical level of development the project is at any given time, whether and which problem areas exist in terms of the fulfilment of the individual quality indicators, who is responsible for them and which other project steps and work packages could be affected. Provided that this instrument is used regularly and diligently then serious deficiencies at the project process level can be more or less ruled out, or they will be noticed at an early stage.

During the course of the 24 months of this project eight measurements will be carried out (approx. every 3 months), which in turn leads to 8 updated versions of this evaluation document. With a consistent implementation of the original project plan as well as all other agreements made with the partners the final version of the snapshot analysis should indicate that all the project steps are marked and that the completion level of each individual item - and thus the entire project - is 100%.

As important and robust as this instrument may be, it must not be forgotten that it is more about evaluating the quantity rather than the quality of the project processes. This qualitative area however is covered especially by the quality assurance measures for the product level.

3.1.2. Project meetings and phases

The first evaluation strand is aimed rather at the *hard facts* of the project process, whereas the second is dedicated to a greater extent towards social, communicative and organisational indicators as well as content and operational areas of the project management. This *includes organising and undertaking the project meetings, communication processes, problem and conflict resolution strategies, partners learning about the different project activities and their participation in these, the partners' level of knowledge concerning fundamental core data and processes in the project (timescales, budget, dissemination, evaluation etc.), evaluation and control measures etc.*

Transnational cooperation initiatives usually organise themselves according to similar patterns, and upon the basis of this fact indicators for the quality assurance can also be standardised across many projects. Since the interaction between the project participants is at its most intense during the *project meetings*,

the organisation and staging of the meetings play an important role; in addition, the *phases* between the project meetings need to be closely monitored, as it is during these times that most of the work takes place, and it is also not optimal that there are large geographical distances between the partners.

Within the framework of the *LEO quali-TC* project evaluation the following quality indicators are proposed in relation to the evaluation and assessment of *project meetings*:

Fig. 8: Relevant quality indicators – series 2

RQI 2: process level 2 – project meetings				
RQI_2.1	Timely agreement of the project meeting (at least 4 months in advance)			
RQI_2.2	Timely planning of the project meeting			
RQI_2.3	Timely distribution of all relevant documents to ensure the successful planning and implementation of the meeting, e.g. registration form, agenda, working instructions etc.			
RQI_2.4	Support concerning the travel and accommodation arrangements provided by the project lead organisation and / or the host organisation			
RQI_2.5	Timely submission of all relevant documents, information, materials by partners			
RQI_2.6	Agenda covers all significant points and issues			
RQI_2.7	Agenda ensures there is sufficient time available			
RQI_2.8	Agenda take into account any organisational hindrances, e.g. transfer times, IT access etc.			
RQI_2.9	Agenda involves all project partners			
RQI_2.10	Underlying the agenda are clear aims			
RQI_2.11	Project partners can help shape the agenda			
RQI_2.12	Agenda contains a relevant mixture of approaches (individual presentations, team / group work, use of different media forms etc.)			
RQI_2.13	Appropriate accommodation (quality, achievability, value for money, distance from meeting location etc.)			
RQI_2.14	Meeting takes place in appropriate surroundings, e.g. room size, facilities			
RQI_2.15	Project management is suitably prepared in terms of content			
RQI_2.16	Project partners are suitably prepared in terms of content			
RQI_2.17	All attendees participate actively in the project meeting			
RQI_2.18	Professional leadership of the project meeting (time, communication and crisis management etc.)			
RQI_2.19	Professional participation by all partners in the project (presentations, communication and discussion etc.)			
RQI_2.20	All participants possess the necessary knowledge and skills to actively take part in the meeting, e.g. language ability			
RQI_2.21	All participants are treated equally and respectfully			

RQI_2.22	Working atmosphere is friendly and relaxed			
RQI_2.23	The project group respects the particular needs of individuals , e.g. dietary requirements, prayer time, disabilities etc.			
RQI_2.24	Balance between working and recreational periods			
RQI_2.25	Agenda includes contact with local target groups, stakeholders, experts, media etc.			
RQI_2.26	Agenda contains a social programme (visits, evening meals together etc.)			
RQI_2.27	Minutes are taken during the meeting			
RQI_2.28	The meeting fulfils the aims and requirements of the agenda			
RQI_2.29	The meeting leads to concrete outcomes and decisions, which are have the agreement (if possible) of all participants			
RQI_2.30	The next project steps are clearly set out and the deadlines are fixed			
RQI_2.31	The minutes include all important outcomes and decisions			
RQI_2.32	The minutes are circulated to all partners as quickly as possible following the meeting (max. 1 week)			

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Closely connected to the quality indicators for the project meetings are those for the *project phases*. Project phases are understood here as "working phases between project meetings" and should not be confused with *the defined content related project phases* such as the *development phase*, *test phase* or *dissemination phase*. The evaluation of the project phases should guarantee that the cooperation and communication between the partners continues to function when the partners do not see each other for many months and are only able to communicate via email, Skype, telephone etc. The indicator series employed here for the evaluation has however been prepared with less detail than the previous one. This is due to the fact that project phases in which the partners do not meet together in person constitute well over 90% of the overall project work time, and furthermore they are constructed in an extremely multilayered and complex manner. The quantity and quality of the project phases, through an intensive evaluation, would go beyond the limits of the scope of the existing possibilities. Therefore it is only possible to concentrate on the most relevant indicators, which were compiled as follows:

Fig. 9: Relevant quality indicators – series 3

RQI 3: process level 3 – project phases				
RQI_3.1	All partners have received information and documents that clearly detail the project process in the project phases, e.g. a workplan			
RQI_3.2	All partners have received information and documents that clearly set out the financial framework of the project, e.g. budget tables and partner budgets			
RQI_3.3	All partners are sufficiently informed about the status quo of the various project levels			
RQI_3.4	All partners are sufficiently informed about previous steps and procedures in relation to the different project levels			
RQI_3.5	All partners are sufficiently informed about the future project steps and procedures in relation to the different project levels			
RQI_3.6	The partners are aware of their roles and tasks in each of the project phases			
RQI_3.7	The contact person is clearly defined for each partner organisation			
RQI_3.8	All contact persons and partner organisations respond to communications promptly, e.g. within 3 days			
RQI_3.9	The project lead organisation is happy with the communication flow in the respective project phase			
RQI_3.10	The partnership is happy with the communication flow in the respective project phase			
RQI_3.11	The communication runs as required at different levels, e.g. telephone, Skype, platforms, additional bilateral meetings etc.			
RQI_3.12	All partners contribute adequately to the project content and activities within the planned timescales			
RQI_3.13	Timescales and deadlines are adhered to			
RQI_3.14	Those responsible for the work packages make all relevant information available to the partnership, so that the activities can be undertaken in the best possible way			
RQI_3.15	The partners are sufficiently informed about the financial and administrative aspects of the project			
RQI_3.16	The project lead organisation provides adequate instruments for regular content-related reporting			
RQI_3.17	The project lead organisation provides adequate instruments for regular financial reporting			
RQI_3.18	The partners report regularly about their activities			
RQI_3.19	The project finance is regularly accounted for internally (at least every 6 months)			
RQI_3.20	The embedding of the project phases between the partner meetings corresponds to the requirements of the project proposal, the project management, the programme guidelines plus what is generally logical			

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3.1.4 Evaluation procedure - process level

The quality indicators, which exist in connection with the *project meetings* and the *project phases*, will be examined by two separate measuring procedures, one right before the *interim report* and one before the *final report*. The evaluations will be accomplished by means of *written questioning* (all partners) and also *oral questioning* (P6). The specifically developed questionnaires are sent out timely and in agreement with the P0. Either electronic or printed versions of the questionnaire are used. This task works on the one hand with a five-level *Likert Scale*, an established scaling procedure for measuring personal attitudes by assessing relevant items (see Miller, Ferderic P., Vandome, Agnes F., McBrewster J. (2010): *Likert Scale: Psychometrics, Questionnaire, Rating scale, Rensis Likert, Psychologist, Skewness, Kurtosis*. alphascript publishing); in addition to this quantitatively orientated measurement the questionnaire also offers space for qualitative feedback in the form of written comments, suggestions, observations etc.

All of this information and data will be considered by the evaluation of the project meetings and the project phases: INIT collects the results of the written questionnaire, then processes the information and illustrates it using graphic and statistical representations; in addition the comments made by the partners are analysed and the intelligence gathered from discussions as well as participants' observations are incorporated.

The most important part of this evaluation work is provided by the analysis and interpretation of the data, which in turn lead to a concrete assessment of the project's progress as well as to recommendations for action in relation to further project steps. All data, information, interpretations and deductions are published in an *evaluation report*, which serves the coordinator, all project partners and P6 in their continuing work.

3.2 Level 2: quality assurance at the product level

3.2.1 Problem identification

The quality assurance of products is rightly regarded as being one of the greatest challenges for collaborative development projects at the European level, as *quality* is a hypothetical construct: The definition and interpretation of their developments often depends upon subjective preferences, individual learning experiences or culturally determined learning traditions. Hence it is often difficult for project groups to discuss the *quality of products* with any degree of consensus and to collectively agree reliable indicators.

For this reason the opinion and assessment of a participating project evaluator is also of little benefit. The evaluator's tasks are to evaluate and assess generally significant and highly technical areas of the project (usually at the process level). In terms of product evaluation the evaluator is less of "an evaluator" but is rather more a "moderator of the evaluation." There are sound reasons for this, e.g.:

- as the evaluator does not usually belong to the target group, he or she cannot speak knowledgeably or authoritatively concerning the needs and requirements of the target group, which similarly applies to the *market orientation* of the learning materials
- the evaluator is also only able, to a certain extent, to assess the pedagogical and didactical preferences of project partners as well as the different European learning cultures.
- also questions concerning the design and layout of the learning materials can to a large degree only be assessed subjectively. Therefore an evaluator is only able to perform an advisory function in this area
- the evaluator does not directly carry out the testing of the learning materials, but instead simply reports indirectly about the experiences and knowledge of others

- finally it would also be illogical to bring experts together from across Europe into a partnership and then expect an individual evaluator to determine the product quality.

What does naturally belong to the evaluator's set of tasks is facilitating the best conditions for a comprehensive evaluation of all relevant products, selecting the appropriate methods plus developing the necessary instruments, collecting the raw data and then systematically evaluating and interpreting it.

An evaluator with sufficient experience of transnational project work and / or with comprehensive pedagogical knowledge can naturally intervene in supporting the product development process.

In any case helpful starting points for the product development process are a basic *market analysis* plus an attempt from the beginning to meet the *needs and expectations* of the *direct and indirect target groups* as well as their *stakeholders*. For this reason it makes sense for the evaluator to become familiar, before the actual start of the product development, with the conditions and context of the project topic in the individual partner countries as well as with the needs and expectations of the target groups and stakeholders. Also the requirements and interests of the individual project partners should be examined, because motivated and active project involvement can only be guaranteed if the products correspond to their needs and their perceptions concerning quality.

For these reasons the quality assurance of the project products is to a large extent project-specific, and it is more difficult to define standardised indicators than is the case at the process level. The appropriate indicators can in part only be ascertained and verified during the course of the project.

3.2.2 Product evaluation methods

The methods described here can just as well be used for the identification and verification of evaluation indicators as they can for the evaluation of products. The following methods were envisaged for the *LEO quali-TC* project:

- 1 - *Research*:

Research or *desk research* involves the gathering of already existing data and information from relevant primary and secondary sources; in addition relevant technical literature, research outcomes, development results from other experts, field reports, media messages etc. are all considered. Naturally it is advisable to undertake this work during the initial phases of a project in order to obtain relevant background information concerning the project topic from already existing specialised knowledge as well as professional and life experience. At best some of this work can be commenced during the project application process in order to transparently present a realistic outline of the issue and to be able to orientate the project from the start.

- 2 - *Questioning*:

Questioning represents an important element. This is mainly achieved by two measuring points: the first is at the beginning of the project with the *Partner Research Report (Res. 4)*, and the second is during *piloting the learning materials (Res. 8)*. The first measurement collects data about the circumstances in the individual partner countries as well as in Europe at all, about existing e-learning offers for volunteer management; the second measurement establishes the experiences, feedback and opinions concerning the learning materials and the overall training course. Different instruments are used for these questioning tasks, which can be verbal or written or a combination of both.

- 3 - *Observation*:

Particularly within the context of the *test phase for the learning materials* the observations *of* participating, e.g. trainers and tutors, and *non-participating*, e.g. uninvolved experts, persons are used to investigate the product quality as well as the effect of the products on the main target group. *Observation* represents an important evaluation element, as it allows the inclusion of non-verbal or sub-conscious processes in the evaluation; e.g. *can a general mood* within a group of learners provide conclu-

sions about the attractiveness of a training course and their interest in the learning materials; criticism is often expressed through body language, gestures etc.

- 4 - *consultation / technical discussion*:

A particular form of questioning is represented by *consultation*, usually in form of a *technical discussion*. This means integrating relevant technical experts (scientists, stakeholder, pedagogues, political decision makers, labour market experts etc.) with their expertise into the product development process. Their input will produce visible indicators, which are more connected with the project at an academic and / or political meta level, and therefore help to consider the products in terms of their integration into larger developmental processes as well as into social, educational and labour market policy contexts.

- 5 - *peer group review*:

The method of *peer group review* used is less formalised and standardised in this project, and has enormous potential for the product evaluation. It assumes that within the partnership - not only through the people specifically taking part, but also through the organisations and networks standing behind it - enormous specialised knowledge is available, and that this expertise should be used to develop the individual quality-assured project products. Thus all project products are sent at the end of each developmental step to all partner organisations for their evaluation and comment; the results of the feedback is then integrated into the further development of the products. Through these continuous evaluation cycles the optimum quality standards should be attainable.

These methods presented are not the only ones used during the product evaluation of this project, but they are the most important upon which the formally driven evaluation processes is based. In addition there are many more methods and their hybrids that can be applied; these play a large role above all in the *informal* and *non-steered* processes, and often those involved are not conscious of it, e.g. through internal consultation discussions within organisations, the align-

ment of product contents with national legal regulations, the unconscious consideration of national educational standards and learning traditions etc. These evaluation forms are very difficult to examine and represent formally. They will be taken into account by the individual evaluation report as far as it seems possible and meaningful.

3.2.3 Evaluation instruments

Assuming the *objects* and *indicators* of the evaluation are clear, then the appropriate evaluation instruments must be developed in the next step. The *instruments* used in *LEO quali-TC* are based on generally valid quality standards in empirical social research as well as on the experience of their application during the course of previous European collaborative projects. For the *LEO quali-TC* products the following instruments will be used:

1. *documentation forms*, e.g. to be able to gain comparable data from desk research and observations by non-participants and then represent it in a standardised form, e.g. in the *partner research reports*
2. *questionnaires*, e.g. by written *questioning*
3. *interview guidelines*, e.g. in the *test phase* or with *the consultation by external experts*
4. *checklists*, e.g. with the *examination of the quantitative requirements* for the products
5. *minutes and experience reports*, e.g. during the *test phase* with tutors / trainers and participants
6. attendance registers (during the test phase)

The specific framework of EU projects (limited time, money and human resources, the large geographical distances between the partners, limited knowledge of empirical social research within the partnership etc.) appears to justify the increased use of standardised procedures and instruments. Nevertheless the instruments should also offer space for *qualitative data collection*, because this can be extremely helpful for the evaluation of products as well as for obtaining concrete operational instructions.

3.2.4 Samples

As has been previously mentioned, different representatives of the target groups, stakeholders and experts are involved with the product evaluation. In the case of the *LEO quali-TC* project these include:

- Technical and vocational tourism schools,
- Universities offering VET courses in tourism and catering
- training centres and VET providers in tourism and catering
- enterprises in tourism and catering
- political decision makers on European, national, regional and local level
- chambers of commerce and enterprises, trade unions
- people working in the tourism and catering sector
- tourists
- labour market specialists
- *LEO quali-TC* partnership

Regarding the internal layering and weighting during the compilation of the individual samples for the product evaluation there is little to say at present, and likewise about how many experts will actually provide input. In any case as far as possible all experts should take part in one of the samples.

According to which indicators the products can be evaluated, P0 and P6, supported by other partners of relevance, will define until end of May 2014.

3.3 Level 3: quality assurance of the dissemination level

3.3.1 Introduction

Within the context of the holistic approach to quality management the dissemination naturally plays a central role in a project. Only if as many relevant people, organisations, facilities and public authorities as possible are informed about the project, its contents, its aims and above all its results, can a sustainable and widespread impact of the project be ensured. Furthermore it must be in the interest of every project group that as many European citizens as possible know about the different projects and can benefit from them, as ultimately their development will have been funded from tax payers money. Having said that the project evaluation should not only be seen purely as a *public relations exercise*, but it must also be assessed in terms of *work ethic*.

3.3.2 The project website (including other dissemination materials)

One of the most important standard products of an EU project is the project website. It serves not only the *dissemination and public relations work*, but it also plays an important role in the *project management* (means of communication and archiving) and the *evaluation* (means of documentation). The construction of a website is to a certain extent a creative act and in aesthetic-artistic terms there is limited scope to apply quality criteria. Nevertheless it must also be possible to measure a project website using certain technical-formal and craftsmanship based indicators, which include the following:

Tab. 10: Relevant quality indicators – series 4

RQI 4: dissemination level – website (Del. 14) (is partly also relevant for other dissemination and advertisement materials such as flyers, posters, news letters etc.; Del. 14, 16, 17, 18, 19)

RQI_4.1	Registered with an eu-domain
RQI_4.2	All features and texts are fully developed in ENG
RQI_4.3	Basic information is developed in all partner languages
RQI_4.4	Offers online translation feature for providing longer texts in all partner languages
RQI_4.5	Download forum is available with all relevant project documents in all partner languages

RQI_4.6	Linked to all project partners
RQI_4.7	Offers discussion forum for communication and interaction with stakeholders, target groups etc.
RQI_4.8	Offers news and events features
RQI_4.9	Contains area accessible only for partners to share confidential documents and information
RQI_4.10	Offers access to E-learning platform
RQI_4.11	Offers access to online-survey tool
RQI_4.12	Includes EC disclaimer and legal information
RQI_4.13	Includes all relevant project identification (logo, correct project title, project number if wanted ...)
RQI_4.14	Includes project title and number
RQI_4.15	Is user-friendly to use
RQI_4.16	Website: Remains online for at least 3 years after the end of the project
RQI_4.17	Print features: Published and produced in numbers foreseen by the application

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The website will be constantly developed further and improved. An initial intensive evaluation on the part of the partnership takes place approximately at April/May 2014, assuming that the basic structure and the different language versions in their raw state can be viewed.

3.4 Level 4: exploitation and sustainability

3.4.1 Introduction

The original motivation and aim of every transnational development project in the *Lifelong Learning Programme* should be to bring about positive change in the spheres of European life, learning and work. For primarily product-orientated projects this means the development of innovative, marketable products, which are successfully used on a long-term basis - all other activities and results of a development project should first and foremost be aligned to this objective. Unfortunately however, only a small percentage of EU projects can fulfill this requirement. Sufficient quality, market relevance and customer orientation of the products are absent from most projects. The causes of this are multilayered just as they are complex and cannot always be influenced by the project group. Also the project evaluator cannot bring about any miracles in this regard. He / she can only try - in cooperation with the entire partnership - to create as optimal a framework as possible for the implementation of a successful project as well as

for the development and establishment of high quality products. The prerequisite for successful product implementation onto the real market is an awareness of the associated difficulties. The project group should get to grips with this problem at a very early stage. Naturally in the first place the quality, market relevance and customer orientation of the project products for their successful use need to be decided upon, but also some strategic, technical and operational aspects must be considered, which importantly likewise must be planned and implemented in a quality assured manner.

3.4.2 Final conference

At the end of the project a *public conference* takes place, representing a central dissemination and sustainability activity. Its staging is linked to the final partner meeting in IT. The main aims of this event are to raise awareness towards the objectives, outcomes and target groups of the project and to promote the project's results and their usage to highly professional and authentic audience. In fact, this event should be one of the key activities within the project's lifetime to foster the sustainable usage and implementation of the main products. Based on the requirements of the application as well as on general experiences made in connection with similar events, the following indicators are under discussion:

Fig. 11: Relevant quality indicators – series 5

RQI 5: Exploitation conference	
RQI_5.1	Takes place during the final 3 months of the project
RQI_5.2	Is held in IT
RQI_5.3	Lasts at least 3 hours
RQI_5.4	Conference languages allow active contributions of all participants
RQI_5.5	Participants represent all of the project's target groups and stakeholders
RQI_5.6	Open to the wider public too
RQI_5.7	The final versions of all products developed and outcomes are presented
RQI_5.8	Provides a wide multi-perspective insight into the work, policy, attitudes and the outcomes of the project group
RQI_5.9	Actively organised by P0 and P1 with support of many of the project partners (through contributions)
RQI_5.10	Pro-actively and timely (at least 4 months) promoted by all partners

RQI_5.11	Includes contributions from external experts, stakeholders and representatives from the target groups
RQI_5.12	Professionally presented, e.g. lively and entertaining quality , use of different presentation techniques etc.
RQI_5.13	Documented by attendance lists
RQI_5.14	Documented by photographs
RQI_5.15	Generate media coverage (if possible during the preparation and post-conference)

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The relevance of the final dissemination conference in relation to the sustainability of the products and their long-term establishment on the education market must however not be overestimated. A conference is ultimately a classic means of dissemination, which can initiate and promote sustainability. Also linked to this conference are the possibilities for awareness raising amongst the audience of industry professionals (particularly political stakeholders) as well as amongst more generic networks, which must be actively utilised.

Ultimately there will probably be few generally valid solutions at the European level. On the contrary it will be more a matter of project partners seeking individual implementation and utilisation opportunities that are in tune with regional and national contexts, and in doing so will achieve lasting successes. Certainly the most important task in relation to the sustainability work a *sustainability strategy*, which must call for individually tailored education and labour market sustainability strategies.

3.4.3 *Exploitation Report*

This issue is still in progress, indicators will be defined with P1 until end of May 2014.

4. Overview and summary

It has been described above what complex structures EU projects possess and how important it is that the *QM-models* also take due account of this fact. Therefore the following levels, items and numbers of indicators were specified for the *LEO quali-TC* project:

Fig. 12: Overview of INIT's evaluation structure

Evaluation level	No.	Series	Item / area	Number of indicators
Process	1	RQI-1	Snapshot analysis	20
	2	RQI-2	Project meetings	32
	3	RQI-3	Project phases	20
Total	-	-	3	72
Product			IN PROGRESS	
	Total	-	-	-
Dissemination	4	RQI_4	Website	17
Total	1	-	-	17
Exploitation	5	RQI_5	Exploitation conference	15
			IN PROGRESS	
Total	1	-	-	15
Total	5	-	5	104

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Following on from this the convergence of the project towards these quality indicators is examined by means of various measuring procedures with the help of different instruments (this also includes the evaluation activities implemented by other partners). Thereby the results can be determined, evaluated and also reported in different ways. They can be communicated in written reports, in check-

lists, in tables or through verbal feedback, and their character can be official or unofficial.

Basically, following outcomes and reports can be expected during the project's lifetime for the evaluation activities INIT is in charge of.

Fig. 13: expected results and outcomes

Evaluation level	Item / area	Point(s) of measurement	Coverage	Results/outcome
Process	Snapshot analysis	12/13; 02/14; 06/14; 09/14; 12/14; 03/15; 06/15; 09/15	all 24 months of the project	8 updated snapshot analyses
	Project meetings (together with phases)	04/14, 09/14 04/15/09/15	all 24 months of the project	4 evaluation reports containing approx. 15 pages each
	Project phases (together with meetings)	04/14, 09/14 04/15/09/15	all 24 months of the project	4 evaluation reports containing approx. 15 pages each
Product	IN PROGRESS			
Dissemination	Website	05/14 09/15	Project development and maintenance	Feedback from all partners and short report
Exploitation	Exploitation conference	09/15	Successful planning and implementation of conference	Observation, checklist, pictures, signatures
	Exploitation report	IN PROGRESS		

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Fig. 13 shows the chronological order of these evaluation activities and it gets evident that the project is well guided and evaluated throughout its lifetime.

However, one must not forget that at this document not all evaluation activities are listed and those for the products as well as for the exploitation report are still missing; they can be expected until May 2015.

INIT Developments Ltd