



ACTing project

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“Social Agents Promoting Active Ageing through ICT”

Monitoring & Evaluation Guidelines

Deliverable N. 16
WP7 - Monitoring & Evaluation

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1. Monitoring and Evaluation Strategy

In the context of the ACTing project, Work Package 7 (WP7) is dedicated to the overall Monitoring & Evaluation activities, ensuring the high quality of both project process and products. Evaluation is an important and productive process that aims at the following general objectives:

- It supports the project and acts as a check on whether the targets have been met;
- It allows the results to be improved based upon judgments made about the value and quality of the project;
- It simplifies decision making and can assist with fundamental changes in the project, should these be necessary;
- It involves all the project partners and provides a context for open discussion, debate and agreement on project performance;
- It should reveal strengths as well as weaknesses and identify obstacles to progress.

The ACTing project foresees the setting up of the **Quality and Evaluation Team (QET)** coordinated by the WP7 “Monitoring & Evaluation” partner Leader (FMD) and composed of 1 person from each project partner. The QET tasks are to point out the project quality indicators, assess the project methodology efficacy and evaluate the project results further implementation, impact and transferability, by designing the evaluation tools and being responsible of evaluation tools submission. QET members are responsible of the project evaluation and monitoring, by analyzing and working out the corrective actions where necessary. Based on a participatory approach, the results of the evaluation will be shared and discussed within the partnership during the project meetings. On the basis of recommendations from evaluator and feedback from partners, corrective actions will be taken if so called upon by the project Coordinator. WP performance indicators are: a suitable definition of the quality and evaluation plan, design of appropriate reporting tools, level of user involvement, efficacy of data collecting tools and consistency of the quantitative/quantitative data collection. Specifically, the members of the QET are the following:

- FMD
- Fundetec
- Fundacion Esplai (FE)
- ICV



- AEPMR

The project Evaluation strategy covers the following aspects:

- **Process Evaluation**

The evaluation of project process is realized by FMD in collaboration with all partners, who monitors and assesses the management efficiency and the level of achievement of project results. FMD analyses and elaborates data coming from partner evaluation conducted through online surveys and other evaluation tools. In this way, it will be able to study critical aspects and gives inputs/suggestions on how overtaking possible gaps and improve project efficiency.

- **Products Evaluation**

It is realized by FMD in collaboration with ALL partners. It is related to the level of achievement of expected results and includes the evaluation of the online learning platform usability and user-friendliness; effectiveness of training methodology and contents quality and user satisfaction; sustainability of the project and possibility of replicating the course methodology and contents. This evaluation mainly aims at assessing the project products and training methodology in terms of effectiveness/efficacy and impact on the project target group through the submission of expectation/satisfaction questionnaires to social agents and elderly people involved in the project and through the arrangement of focus groups in each country.

- **Quality Reporting Activity**

In particular the drawing up of the Progress Evaluation Report, which includes the recommendations to improve project management activities and the Final Evaluation Report at the end of the project which summarizes the results of data collected during the project.

The Deliverables foreseen within the WP7 are the following:

- **Deliverable N. 16: “Monitoring and Evaluation Guidelines”**

Internal strategy providing responsibilities, criteria and tools for quality assurance: by December 2013.

- **Deliverable N. 17: “Internal Evaluation Reports”**

A Progress Internal Evaluation Report (September 2014) concerns the evaluation of project management activity and work plan. It will summarize the results of the evaluation grids

compiled by partners and the results of the external evaluation. It will include the recommendations to improve the project management activities. A Final Internal Evaluation Report (September 2015) will include both the results of the process and products evaluation.

2. Partners' role and responsibilities

Each ACTing partner contributes to the achievement of the good quality of the project. FMD as leader of WP7, coordinates all monitoring and evaluation activities while partners participate in the delivery of WP7 tasks and products. Roles and responsibilities are distributed among partners as described in the table below:

Country	Name	Role and tasks in the work package
Spain	Fundetec	<ul style="list-style-type: none"> Nominate 1 staff person to be part of Q&E Team (QET) Provide feedback to the Monitoring & Evaluation guidelines, tools and reports Complete the Management Evaluation Grid every 6 months Complete the meeting assessment online survey after each project meeting (in presence) Submit evaluation questionnaires (pre-post) to target groups and arrange focus groups: data collection and analysis at national level
Italy	FMD	<ul style="list-style-type: none"> WP7 Coordination and setting up QET Drawing up of Monitoring & Evaluation Guidelines and tools (deliverable 16) Evaluation of project management (meeting assessment/MEG) Identify indicators to measure the effectiveness of the project methodology and contents through the Real Time Evaluation (RTE) Evaluation of the learning approach (design and submit expectation and satisfaction questionnaires to target group, data analysis at EU level; focus group data collection and analysis at EU level) Draft Progress & Final Internal Evaluation Reports (deliverable 17)
Spain	Fundacion Esplai	<ul style="list-style-type: none"> Nominate 1 staff person to be part of Q&E Team (QET) Provide feedback to the Monitoring & Evaluation guidelines, tools and reports Complete the Management Evaluation Grid every 6 months Complete the meeting assessment online survey after each project meeting (in presence) Submit evaluation questionnaires (pre-post) to target groups and arrange focus groups: data collection and analysis at national level

Switzerland	ICV	<ul style="list-style-type: none"> • Nominate 1 staff person to be part of Q&E Team (QET) • Provide feedback to the Monitoring & Evaluation guidelines, tools and reports • Complete the Management Evaluation Grid every 6 months • Complete the meeting assessment online survey after each project meeting (in presence) • Submit evaluation questionnaires (pre-post) to target groups and arrange focus groups: data collection and analysis at national level
Romania	AEPMR	<ul style="list-style-type: none"> • Nominate 1 staff person to be part of Q&E Team (QET) • Provide feedback to the Monitoring & Evaluation guidelines, tools and reports • Complete the Management Evaluation Grid every 6 months • Complete the meeting assessment online survey after each project meeting (in presence) • Submit evaluation questionnaires (pre-post) to target groups and arrange focus groups: data collection and analysis at national level

3. Process Evaluation

Project management is a critical activity that influences the well proceeding of all project activities and the achievement of mid-term and final results. In fact, the evaluation of the management activity is periodically carried out throughout the project with the purpose to improve the ongoing process by taking into consideration the results of the evaluation. This process guarantees a continuous impact on the project management activity.

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The role of the Management Evaluator (FMD) is:

- To define effective criteria and indicators to evaluate the management activity and propose evaluation tools, such as a management evaluation grid to be periodically submitted to the partners.
- Collect evaluation results and assist with their analysis.
- Provide a report at the end of each meeting /management Evaluation.
- Use all this information to produce the Progress and Final internal Evaluation reports (Deliverable n. 17).

In order to collect the management evaluation data to assess the quality of management activity and analyze critical issues, specific tools are designed by the members of QET. In particular, these are a Management Evaluation Grid (evaluation of project management activities) and an online survey to evaluate the project plenary meetings.

Specifically, the Progress Evaluation report concerns the evaluation of project management activity and work plan. It summarizes the results of the management evaluation grids compiled by partners and the results of the meetings evaluation. It also includes the recommendations to improve the project management activity. The Final evaluation report will present the results of both the process and products evaluation.

In carrying out this role it is essential that the Evaluator uses appropriate opportunities for critical analysis for any assumptions made by the QET members. FMD can assess management activity considering some main categories of indicators such as:

- Coordination/WP leadership
- Partnership
- Meetings
- Communication

For evaluating the ongoing quality level of the project management it will be taken into account the following indicators/criteria:

- Effective use of time
- Quality of coordination and leadership
- Definition of detailed work plan
- Suitable allocation of responsibilities
- Definition of internal deadlines
- Designing of a suitable reporting tools and deliverables templates
- Ongoing and correct cost certification
- Regular meeting attendance
- Regular and complete report and documents of meetings
- Perceived efficiency /efficaciousness of team working
- Clarify of objectives and contents in coordinator / WP leader instructions
- Communication among partners: understanding messages
- Communication among partners: promptly replying messages
- Quality of the means of communication

For evaluating the project meetings it will be taken into account the following indicators/criteria:

- Planning
- Organization
- Participations
- Value
- Attitude
- Agenda

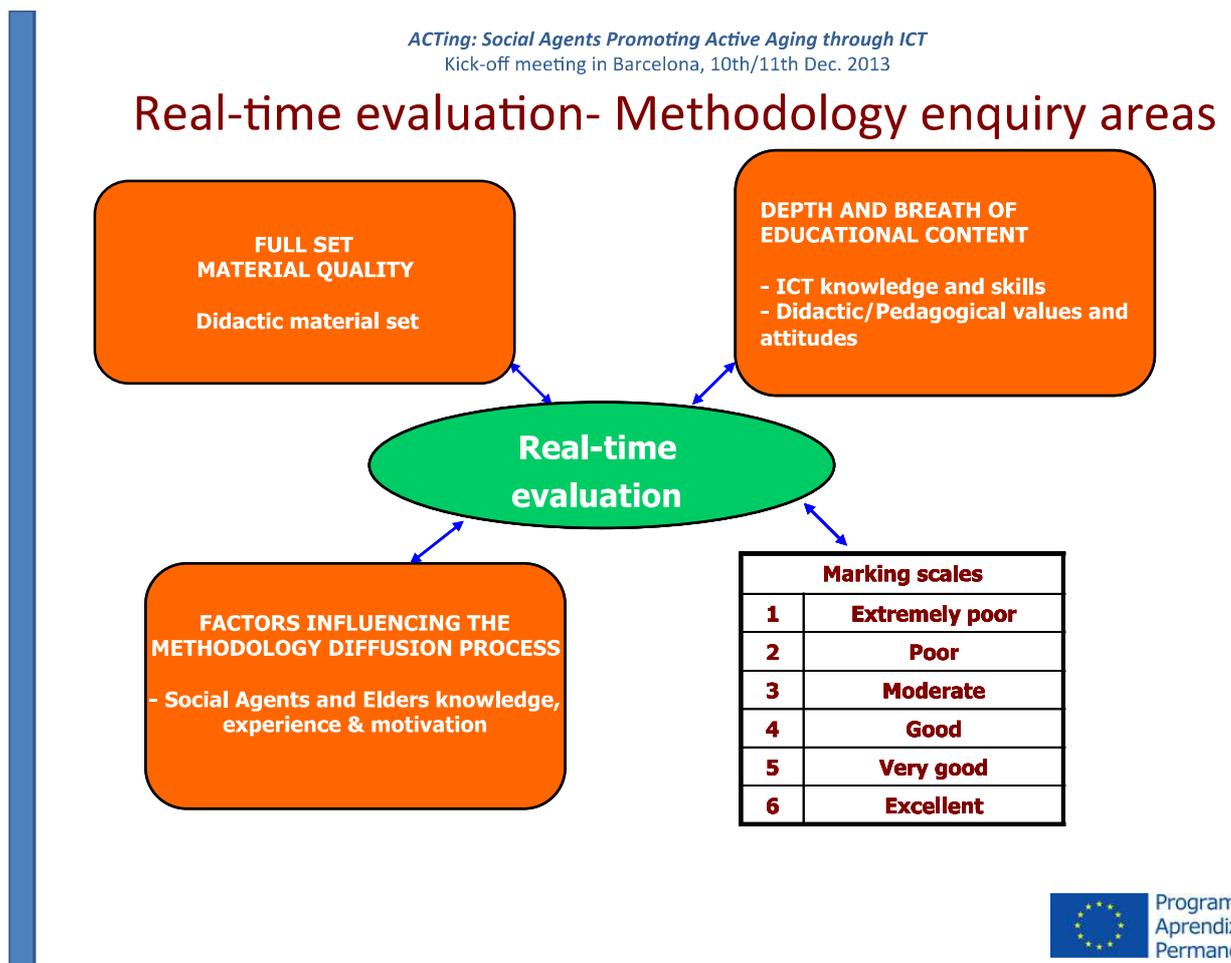
Work Plan

Tool	Filling out	Partners responsible
Management evaluation grid	Every 6 months March 2014, September 2014, etc.	ALL
Online Survey for the evaluation of the kick off meeting	Partners' kick off meeting	- FMD for the questionnaire designing and results evaluation. - All meeting attendances: filling in of questionnaire
Online Questionnaires for the evaluation of the interim plenary meetings and final meeting	Partners' interim plenary meetings	- FMD for the questionnaire designing and results evaluation - All meeting attendances: filling in of questionnaires

4. Products Evaluation

The Real Time Evaluation (RTE) approach will be adopted to evaluate the ACTing project learning methodology. It acknowledges that educational effectiveness of the project methodology depends on at least the following 3 factors:

- Quality of the full set of materials used in the methodology, including contents. If training material is difficult, it will reduce the methodology effectiveness;
- Depth and breath of educational content of the methodological set. If training material is superficial or too narrow, it will limit the scope of the methodology impact;
- Experience and motivation of target groups (social agents and elderly).



The quality of products is related to the level of achievement of expected results, hence of project goals. It includes the evaluation of:

- The e-learning platform usability and user-friendliness;
- effectiveness of training methodology and contents quality and user satisfaction;
- sustainability of the project and possibility of replicating the course methodology and contents;
- transferability of results to different disciplines / target groups.

The internal QET, coordinated by FMD is responsible for:

- designing and submitting expectation/satisfaction questionnaires to direct target groups before and after the ACTing training pilot course.
- organizing focus groups in partner countries involving social agents and elderly people, at the end of the piloting phase.
- drafting the Final Evaluation Report.

The Final Evaluation Report will contain both the description of the overall methodology and evaluation tools applied and the results of the real-time evaluation activities. Specifically, it will contain the results of the internal evaluation process concerning: training methodology employed, contents quality, usability of the platform itself, benefits gained by participating to the course, the transferability of the methodology/contents to other subjects. FMD (WP7 leader) will assess the training model, the social, didactical and knowledge flows. The Report will focus on the Pilot results. Each partner will contribute data and information.

5. ANNEXES

Annex 1: Online survey for project meetings assessment

Scale:

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

Example:

1 Was the meeting properly planned? *

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
a. Participants were notified in advance of the meeting and location.	<input type="radio"/>				
b. There was a pre-arranged agenda.	<input type="radio"/>				
c. Participants and the hosting partner were ready for the meeting.	<input type="radio"/>				

1. Was the meeting properly planned?*

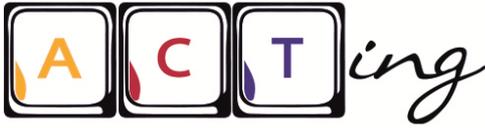
- a. Participants were notified in advance of the meeting and location.
- b. There was a pre-arranged agenda.
- c. Participants and the hosting partner were ready for the meeting.

2. Was the meeting well organized?*

- a. The meeting started on time.
- b. Guests were introduced and welcomed.
- c. Agendas were available for all members.
- d. The purposes for the meeting were made clear.
- e. One topic was discussed at a time.
- f. One person had the floor at a time.
- g. Discussions were relevant.
- h. Distribution of tasks was complete and clear.
- i. Plans for the next meeting were announced.
- j. All that was planned for the meeting was covered.

3. How was participation in meeting?*

- a. All partners participated in discussions and explanations.



- b. The participants made good use of questions.
- c. The partners gave suggestions to the coordinator.
- d. Responsibilities were evenly distributed.
- e. Number of participants per partner was enough.

4. What was the value of the meeting?*

- a. Progress was made towards goals.
- b. Something was learned.
- c. The partner organizations knew each other.
- d. The context Analysis framework for desk research were well explained.
- e. The tasks of the Work Packages (WP) were introduced in detail.
- f. The deadlines for the tasks were discussed and decided jointly.
- g. The deadlines for the tasks were discussed and decided clearly.

5. How was the attitude towards the meeting?*

- a. Attendance was good.
- b. There was a warm-up period before the meeting.
- c. Participants helped one another when needed.
- d. There was an atmosphere of free expression.

6. Overall Evaluation of the meeting. Leave your comments. (Open question)*

7. Suggestions for the next meeting. (Open question)

***Mandatory question.**

Annex 2: Management Evaluation Grid

SCALE:

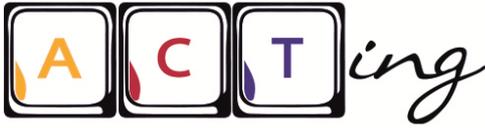
- Very negative
- Negative
- Neutral
- Positive
- Very positive

Area: Management and Quality

- **Has the coordination of the project designed a sufficiently detailed work plan to manage efficiently the project?**
Detail level of work plan for WP1& 2 (Management and Quality)
Quantity of internal deadlines
Feasibility level of deadlines
- **Have internal deadlines been defined accurately in quantity and feasibility?**
Quantity of internal deadlines
Feasibility level of deadlines
- **Which are these deadlines and are they being monitored? If so, how?**
Deadlines monitoring process installation
Monitoring process features
Average number of days of delay in task completion (per partner and overall)
Number of work packages completed with no delays from any partner
- **Have adequate reporting tools been developed and implemented?**
Quantity of reporting tools created
Typology and quality of reporting tools created
Clarity
Cost certification procedures description
- **Have adequate deliverable's templates been created?**
Quantity of templates created
Typology of templates created

Area: Meetings and events

- **Are meeting's reports and documentation being produced on time and with quality?**
Quantity of meeting's reports produced
Timeliness of meeting reports produced
Survey to evaluate meetings
Satisfaction degree in meeting's participation
Attending ratio per meeting and overall
Participation level per partner and individual



Area: Activities and Communication

- **Are instructions from the coordination to partners clear and well understood by all partners?**

Degree of satisfaction with coordination and leadership

Quantity of instructions communicated

Number of communication incidents/conflicts

Response times to operative questions

- **What is the communication quality level within the partnership (concerning WP 1 & 2)?**

Communication tools list

Periodicity of email communication between partners

Level of usage of the project's website and its features

Team work added value

In cases of "very negative" or "negative", explain your answers.