

Monitoring report

Period: June 2009 - December 2009

1. Framework of monitoring and evaluation activities

MONITORING

Monitoring represents a tool for project efficiency, transparency and quality. It fulfils three basic needs:

1. *rationalise* activities, to allow an effective resource allocation
2. *improve* the quality of results
3. *ease* the mainstreaming process

It is therefore a strategic tool to measure the activities undertaken and to orient their re-engineering. Monitoring:

- *assesses* the work progress
- analyses *all processes* relating to the project
- is carried on a *regular basis* surveying
- *measures* the achievement of standard targets

The strategy for monitoring deploys through the following phases:

- a. *survey* of work in progress
- b. *description* of work in progress and *elaboration* of collected data, further divided into:
 - *synchronic* elaboration, to analyse the status of the project at stated deadlines
 - *diachronic* elaboration, to analyse the trend of the project at stated deadlines
- c. *determination of any differences* between the expected and the actual project development
- d. *feedback* (highlighting of differences exceeding the acceptable allowances) and *feedforward* (interventions to adjust future actions in the project).

Monitoring applies to the following processes:

- a. implementation of activities (training, certification, etc.)
- b. project management
- c. financial management

Monitoring is carried out by the following structures and figures:

Networking Committee

It is in charge, among the others, of :

- diachronic monitoring. It controls the correctness of methodologies adopted to produce each project outcome, and outcomes themselves. It defines its own working criteria and standards to be kept
- synchronic monitoring. It controls all processes, particularly the piloting and financial ones, both locally, in every Partner's country, and globally (during meetings, where each member reports its data). It defines its own working criteria and standards to be kept.

Project Coordinator

He is an expert of monitoring and evaluation procedures. He makes criteria expressed by Committees clear, and translates them in procedures and tools. He is also in charge of monitoring the activity of the Committees.

To foster monitoring activities, specific tools will be issued, as questionnaires, focus groups, interviews carried by Delphi method, and so on. All collected data will be elaborated by computerised tools, developed ad hoc into Monitoring Reporting to Networking Committee.

EVALUATION

Evaluation (which follows and partially overlaps monitoring) is intended to answer questions such as:

- are expected objectives actually reached?
- did an improvement actually take place in trainees, by means of actions undertaken?
- how is it possible to measure, or anyway use, information collected during evaluation to re-design more effective actions?

The evaluation process aims therefore to investigate two main dimensions of the project:

- its *effectiveness*, that is the capability of reaching planned objectives;
- its *efficiency*, that is the ratio between actual results (apart from their effectiveness) and the amount of human and financial resources spent to achieve them.

With regard to this subject, the evaluation process:

- *analyses* causes of facts assessed by monitoring, discuss consequences and find possible options
- *dwells upon* critical points of the project
- occurs in *precise moments* during the project
- *measures* effectiveness and efficiency
- *couches judgements*
- is *multi-level*

Possible constraints will be also taken into account, as for example:

- different normative and territorial contexts;
- the fact that occupational, social and economical effects of active ageing policies may be verified only on a long term basis, and are strongly influenced by other factors, that lie outside the scope of our project.

This means that sometimes only potential effects of the project might be investigated.

Evaluation applies to the same processes as monitoring, and will proceed on its results basis.

Evaluation will basically be an *internal* one, being the external one committed to monitoring and evaluation activities carried out by the Commission, which will represent an essential contribution to the project.

Anyway, the number and the composition of the partnership is wide and skilled enough to assure effectiveness and objectiveness of evaluation.

Nevertheless, two different levels of internal evaluation are envisaged:

1. a self-evaluation level, provided for by the Scientific and the Steering Committee, during their meetings;
2. an evaluation level (comparable to internal auditing according to ISO 9000:2000) assured by the evaluation expert. This will occur three times on-going, and once at the end of the project.

Again, specific tools will be issued for evaluation purposes, according to what we said before about monitoring.

Each evaluation activity will give rise to a specific report.

In the following pages, a general planning for monitoring and evaluation activities is provided for. This planning was submitted to and approved by the Steering Committee and the Transnational Coordination Committee during their kick-off meetings: this ensures a sort of mutual agreement on aims and deployment of the activities between the Committee and the evaluator.

Process 1: Project implementation

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
1. To support a new professionalism for trainers in a life-long and globalized context	<p>1.1. Survey of existing, up-to-date EU sources and guidelines on quality of VET teachers/trainers competences and qualifications</p> <p>1.2. analysis and mapping of trainers' new competences needs</p>	<p>1.1.1. report on national systems of quality and recognition of teachers/trainers competences</p> <p>1.1.2. Devise of a Reference Framework of EU sources and guidelines</p> <p>1.2.1. Devising of a questionnaire</p> <p>1.2.2. Field research: needs' analysis</p> <p>1.2.3. Matrix 1: mapping of new competencies emerged</p>	<ul style="list-style-type: none"> • time • number of teachers/trainers available and willing to participate • consistence and homogeneity of surveys lead by each partner 	<ul style="list-style-type: none"> • have all scheduled activities been performed? If not, why? (ql, et) • were all products developed? If not, why? (qt, et) • was activity carried out on time? (ql, ec) • did the expected number of trainers/teachers answer? (qt, et) • did the target group consider the tools effective enough? (ql, et) • actual number of teachers/trainers involved in the needs analysis vs. planned number (250) (qt, et); • are tools and findings comparable, transferable (TR) and compliant with the objectives? (ql, et) • percentage of women among the beneficiaries as related to the average 	<ul style="list-style-type: none"> • timing check • review of outcomes • internal audit and reporting 	<ul style="list-style-type: none"> • Networking Committee • National Project Teams • Project Coordinator

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
				in the involved sectors. (qt, GE) <ul style="list-style-type: none"> • did the developed material consider the gender issue? (ql, GE) • was the attitude of beneficiaries towards the project theme affected by gender? How? (ql, GE) • are project activities self-sustainable beyond its time limits? Under what conditions? (ql, CO) • are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (ql, CO) 		
2. Profiling the European Training Antenna	2.1. Job description of the profile of the European Training Antenna 2.2. Drafting of the Certificate of the	2.1.1. Matrix 2: matching of the outcomes of the surveying phase 2.1.2. Detailed job description of the EuTA: competencies and tasks expected 2.2.1. Certificate of the EuTA	<ul style="list-style-type: none"> • Time • homogeneity of concepts • differences among partners' national regulations 	<ul style="list-style-type: none"> • have all scheduled activities been performed? If not, why? (ql, et) • were all products developed? If not, why? (qt, et) • was activity carried out on time? (ql, ec) • are the products developed compliant with any existing 	<ul style="list-style-type: none"> • timing check • Networking Committee meetings • internal audit and reporting 	<ul style="list-style-type: none"> • Networking Committee • National Project Teams • Project Coordinator

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
	EuTA	<p>professional profile (model for the recognition of competences standards)</p> <p>2.2.2. Guide containing the rationale of the model, instructions for use, requirements for certification, explanation of steps to take, etc.</p>		<p>national/European standard? (ql, et, TR)</p> <ul style="list-style-type: none"> are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO) 		
3. Definition of a model for the establishment of the European Training Antenna	<p>3.1 Development of a multi-language training pathway, organized in two main areas: new key competences; European awareness</p> <p>3.2 Test of training pathway and release of final product</p>	<p>3.1.1 definition of training units templates</p> <p>3.2.1 peer-to-peer workshops to test the models developed</p>	<ul style="list-style-type: none"> time 	<ul style="list-style-type: none"> have all scheduled activities been performed? If not, why? (ql, et) were all products developed? If not, why? (qt, et) was activity carried out on time? (ql, ec) were at least 10 training units designed? (qt, et) do training units include all competencies listed according to outcomes? (ql, et) 	<ul style="list-style-type: none"> timing check Networking Committee meetings internal audit and reporting 	<ul style="list-style-type: none"> Networking Committee National Project Teams Project Coordinator

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AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
				<ul style="list-style-type: none"> actual number of participants involved in the workshops vs. planned number (2*10) (qt, et); actual number of certificated Antennas vs. planned number (12) (qt, et); are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO) 		
4. Promotion, exploitation and sustainability of the Network	<p>4.1. Promotion of DOCTAE outputs</p> <p>4.2. Empowerment of network potentialities</p>	<p>4.1.1. Project logo</p> <p>4.1.2. Web site and links</p> <p>4.1.3. Leaflet</p> <p>4.2.1. Links to other projects/networks (e.g. Europe Direct, SPACE)</p> <p>4.2.2. Promotion to general public: exhibitions, workshops, etc.</p> <p>4.2.3 Final product:</p>	<ul style="list-style-type: none"> costs time willingness of other stakeholders to develop further initiatives 	<ul style="list-style-type: none"> have all scheduled activities been performed? If not, why? (ql, et) were all products developed? If not, why? (qt, et) was the dissemination activity carried out in time (ql, et) and under budget? (qt, ec) links to the web site (qt, et) number and circulation of the project brochure against planned (2.000) (ql, qt, et) 	<ul style="list-style-type: none"> Networking Committee meetings internal auditing reporting 	<ul style="list-style-type: none"> Project coordinator Partners

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AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
		EuTA CD-ROM 4.2.4. Final event 4.2.5. Multiplier effect: new projects, collaborations, partnerships, etc.		<ul style="list-style-type: none"> • number of copies of the final product (1.300) and its short version in 9 languages (qt, et); (TR) <ul style="list-style-type: none"> • number of participants to SPACE networks events against planned (250) (qt) • number of Europe Direct newsletters reporting about project (qt) • number of participants to Final Event (100) • all countries involved in the dissemination activities? Other countries, beside the partners, involved? • did transnational partners continue to collaborate? (GE) <ul style="list-style-type: none"> • was the attitude of stakeholders towards the project theme affected by the gender of beneficiaries? How? 		

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AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
				(CO) <ul style="list-style-type: none"> • are project activities self-sustainable beyond its time limits? Under what conditions? • which kind of continuity proved possible for project activities? • are methodologies and tools developed during the project transferable to other projects /sectors/ countries (TR)? Which? Under what conditions? 		

1.2. Process 2: Project management

INDICATORS : <i>ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity</i>				
SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
1. Agreements with partners	1.1. sharing of roles among the Partners 1.2. signature of agreements	<ul style="list-style-type: none"> all agreements signed? (ql, et) any changes to the proposed draft of agreement? Of which kind? (ql, et) any changes to the budget? Of which kind? (ql, et) 	<ul style="list-style-type: none"> direct contact with partners 	<ul style="list-style-type: none"> Lead Partner (Project coordinator + staff)
2. Decision-making structures	2.1. composition of the Networking Committee 2.2. frequency and regularity of Committees meetings 2.3. regularity of meetings proceedings	<ul style="list-style-type: none"> are all partners represented in the proper Committee? If not, why? (ql, et, TR) are Committees meeting held according to the frequency indicated in the project? If no, why? (ql, et) are meetings proceedings regularly produced and sent to the partners? If not, 	<ul style="list-style-type: none"> internal audits direct feedback to the Lead Partner 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff) Evaluation expert

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity				
SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		why? (ql, et) <ul style="list-style-type: none"> was it necessary to replace any partner? (TR) did all partners actively cooperate according to their assigned tasks? did all transnational meeting take place in the countries they were planned to? (GE, qt) ratio male/female among members of the project management structures (preferential target 1:1; minimum 1:2) 		
3. Internal organisation	3.1. promoter's management structure 3.2. partners' management structure	<ul style="list-style-type: none"> does the promoter's and partners' management structures fulfil what provided for in the project? (ql, et) was it necessary to set up any other structure/figure to 	<ul style="list-style-type: none"> internal audits direct feedback to the Promoter 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff) Networking Committee Evaluation expert

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity

SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		improve project management? (ql, et) <ul style="list-style-type: none"> ratio male/female among members of the promoter and partner management structures (preferential target 1:1; minimum 1:2) (GE, qt) 		
4. Communication	4.1. communication methods 4.2. regularity of communication	<ul style="list-style-type: none"> average time for transmission of communications (ql, et) average time of response to communications (qt, et) number of paper communications vs. number of electronic communications (qt, et) 	<ul style="list-style-type: none"> internal audits direct feedback to the Promoter 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff) Partners Evaluation expert
5. Reporting	5.1. punctuality of the reporting activities 5.2. compliance of reports to the standards set by the EC	<ul style="list-style-type: none"> were all reports sent to the EC in time? (ql, et) working hours devoted by the project secretary office to 	<ul style="list-style-type: none"> direct feedback to the Promoter 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff)

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity				
SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		revise/correct/integrate reports (qt, et) <ul style="list-style-type: none"> were EC standards and requirements fulfilled? (ql, et) 		
6. Time scheduling	6.1. observance of expected deadlines for activities	<ul style="list-style-type: none"> was it necessary to revise the scheduled timetable of the project? (ql, et) How many times? (qt, et) was it necessary to ask the EC for prorogations? (ql, et) was it necessary to modify the objectives/activities of the project? To which extent? (ql, et) 	<ul style="list-style-type: none"> Gantt diagram Internal communication 	<ul style="list-style-type: none"> Lead Partner Networking Committee
7. Documents management	7.1. set up of standards for documents 7.2. documents maintenance 7.3. documents distribution	<ul style="list-style-type: none"> have format standards for documentation related to the project been defined? (ql, et) are they really in use? (ql, et) are all documents related to the project traceable? (ql, et) are all documents related to the project available for auditing/control purposes? 	<ul style="list-style-type: none"> internal audits 	<ul style="list-style-type: none"> Evaluation expert

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity

SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		(ql, et) <ul style="list-style-type: none"> • are there any criteria for the distribution of documents? (ql, et) • is a distribution list always included in documents? (ql, et) 		

1.3. Process 3: Financial management

ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
1. Bank accounts	<ul style="list-style-type: none"> • Did the Promoter get the financial guarantee? (ql, et) • Did the Promoter open a separate bank account or separate accounting system for the project? (ql, et) • Did each Partner open a separate bank account or separate accounting system for the project? (ql, et) 		
2. Income	<ul style="list-style-type: none"> • Did co-financing Partners comply with the deadlines for payments? (ql, et) • Percentage of actual co-financing vs. expected co-financing (qt, ec) • Are payments from the EC regular? (ql, et) • Percentage of actual EC financing vs. expected EC financing (qt, ec) 		
3. Expenditure	<ul style="list-style-type: none"> • Are payments to Partners regular? (ql, et) • Percentage of actual payments vs. expected payments (qt, ec) • Are statements of accounts regular and timely? (qt, ec) • Is there any non-eligible expenditure? (ql, et) • Percentage of non-eligible expenditure vs. eligible expenditure (qt, ec) • Were expenditure limits (travel, accommodation, etc.) stated in the grant agreement exceeded? (ql, ec) 	<ul style="list-style-type: none"> • internal audits • Promoter's accounting system • external audit 	<ul style="list-style-type: none"> • Lead Partner (administrative office) • Partners (administrative offices) • Evaluation expert
4. Budget	<ul style="list-style-type: none"> • Is the project being carried out under budget? (ql, ec) • Is it necessary to modify the budget? (ql, ec) • How much, and under which budget headings? (qt, ec) 		
5. Accounting system	<ul style="list-style-type: none"> • Are the financial rules set in the Grant agreement all complied with? (ql, ec) • Does the promoter have a computerised, working accounting system? (ql, et) • Are all debts and credits identifiable? (ql, et) • Are there supporting documents for every income/expenditure incurred during the project? (ql, et) • Are they easily and quickly traceable and available? (ql, et) 		

2. State of play

In the following pages an account is given on how monitoring and evaluation activities are going on, and how and if (and if not, why) success indicators are being fulfilled.

This state of play of course refers to the period covered by the present report, i.e. from June 2009 (immediately after the partners' meeting in Reggio Emilia - IT) to December 2009 (immediately after the partners' meeting in Kaunas - LT).

Qualitative indicators are rated on an on/off/stand by (positive/negative/pending) basis.

Quantitative indicators are rated by numeric values, and an overall evaluation is given with a "traffic-light" signal, i.e.:

- green = goals were fulfilled
- yellow = goals were not completely fulfilled, or not exactly in time, or not yet
- red = there is a considerable gap between expected and actual results.

The above indicators, when applicable, are followed by the dimension of:

- Transnationality = TR
- Gender = GE
- Complementarity = CO

B.2.1. Process 1: Project implementation

<i>Aim 1</i>	
To support a new professionalism for trainers in a life-long and globalized context	
<i>RELATED ACTIVITIES</i>	<i>EXPECTED OUTCOMES</i>
1.1 Survey of existing, up-to-date EU sources and guidelines on quality of VET teachers/trainers competences and qualifications	1.1.1. Report on national systems of quality and recognition of teachers/trainers competences 1.1.2. Devise of a Reference Framework of EU sources and guidelines
1.2 Analysis and mapping of trainers' new competences needs	1.2.1. Devising of a questionnaire 1.2.2. Field research: needs' analysis 1.2.3. Matrix 1: mapping of new competencies emerged
<p><i>Monitoring activities</i></p> <ul style="list-style-type: none"> • Timing check Mainly carried out by IFOA staff. • Review of outcomes 1.1.2. Completed (see previous report) 1.2.1. Completed (see previous report) • Internal Audit and Reporting Activities and finance were checked in order to endure a smooth running of activities and verifying the need for changes to timetable and/or budget. The state of play was presented during the partners' meeting in Kaunas (LT), where also an evaluation session was held, in order to start self-assessing project outcomes, management and impact. 	
<p><i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i></p>	
<ul style="list-style-type: none"> • <i>have all scheduled activities been performed? If not, why? (ql, et)</i> All activities pertaining to this phase were completed. 	Rating Green
<ul style="list-style-type: none"> • <i>were all products developed? If not, why? (qt, et)</i> The survey was completed and results compared. 	Green
<ul style="list-style-type: none"> • <i>was activity carried out on time? (ql, ec)</i> Yes, previous delays were caught up with. 	Green

<ul style="list-style-type: none"> • <i>did the expected number of trainers/teachers answer? (qt, et)</i> Yes. See previous report. 	Green
<ul style="list-style-type: none"> • <i>did the target group consider the tools effective enough? (ql, et)</i> Yes. See previous report. 	Positive
<ul style="list-style-type: none"> • <i>actual number of teachers/trainers involved in the needs analysis vs. planned number (250) (qt, et);</i> 252 people were involved in the survey, in line with what planned. 	Green
<ul style="list-style-type: none"> • <i>are tools and findings comparable, transferable (TR) and compliant with the objectives? (ql, et)</i> Yes. See previous report. 	Positive
<ul style="list-style-type: none"> • <i>actual percentage of women among the beneficiaries as related to the average in the involved sectors (GE, qt)</i> Yes. See previous report. 	Green
<ul style="list-style-type: none"> • <i>did the developed material consider the gender issue? (GE, ql)</i> Not directly. See previous report. 	Negative
<ul style="list-style-type: none"> • <i>was the attitude of beneficiaries towards the project theme affected by gender? How? (GE, ql)</i> No. See previous report. 	Positive
<ul style="list-style-type: none"> • <i>are project activities self-sustainable beyond its time limits? Under what conditions? (CO, ql)</i> The survey should be kept up-to-date regularly, which requires an effort by partners also in the future. True it is, however, that detailed information on the evolution of national systems can be found for example at Cedefop's website¹. The needs analysis results, on the other side, strongly depend on the sample of respondents, the context and the timing. Needs may change fast, therefore it should be carried out again, at least in order to assess differences with the present situation. The tool (questionnaire) could be made more detailed for some aspects, and could take advantage from the set of knowledge, skills, attitude existing in the EUTA job profile. Of course, it should be kept as lean and easy to answer as possible, in order not to frighten or bore interviewees. Accompanying the questionnaire compilation with a direct interview is strongly recommended, even if this brings to higher costs. 	Partially positive
<ul style="list-style-type: none"> • <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO, ql)</i> Yes, the tools and methods adopted seem transferable (adaptable) to other countries and possibly sectors. However, conditions for an effective transferability could be assessed only at the end of the project cycle. 	Positive

Aim 2	
Profiling the European Training Antenna	
RELATED ACTIVITIES	EXPECTED OUTCOMES
2.1 Job description of the profile of the European Training Antenna	2.1.3. Matrix 2: matching of the outcomes of the surveying phase 2.1.4. Detailed job description of the EuTA: competencies and tasks expected
2.2 Drafting of the Certificate of the EuTA	2.2.1. Certificate of the EuTA professional profile (model for the recognition of

¹ QUI INDIRIZZO WEB CEDEFOP

	competences standards) 2.2.2. Guide containing the rationale of the model, instructions for use, requirements for certification, explanation of steps to take, etc.
Monitoring activities <ul style="list-style-type: none"> Timing check Mainly carried out by IFOA staff. Networking Committee meetings The Networking Committee met in Kaunas (LT) in December 2009. There, the state of play was examined thoroughly by partners, and a specific evaluation session with ad hoc developed material was carried out. Internal Audit and Reporting Activities and finance were checked in order to endure a smooth running of activities and verifying the need for changes to timetable and/or budget. The state of play was presented during the partners' meeting in Kaunas (LT), where also an evaluation session was held, in order to start self-assessing project outcomes, management and impact. 	
INDICATORS : <i>ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> <i>have all scheduled activities been performed? If not, why? (ql, et)</i> Delays accumulated in the first part of the project performance period were substantially caught up with, and the project is now performing 90% on schedule. 	Positive
<ul style="list-style-type: none"> <i>were all products developed? If not, why? (qt, et)</i> Matrix 2 is completed, listing competences domains for the EUTA. The job profile has been developed accordingly, mixing the bottom-up results of the survey and the top-down framework deriving from official documents and institutions. The EUTA certificate has been defined. The guide accompanying the certificate has still to be developed, as it must include references to training units, that were completed just in time for the meeting in Kaunas. 	Green Yellow
<ul style="list-style-type: none"> <i>was activity carried out on time? (ql, ec)</i> Time used to complete tasks (duration of activities) is now in line with plans. 	Positive
<ul style="list-style-type: none"> <i>are the products developed compliant with any existing national/European standard? (ql, et, TR)</i> Yes. Products are being developed in line with Europass, the EQF, the ECVET. 	Positive
<ul style="list-style-type: none"> <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO, ql)</i> Yes, specially given the compliance with EU standards, the tools and methods adopted seem transferable (adaptable) to other countries and possibly sectors. However, conditions for an effective transferability could be assessed only at the end of the project cycle. 	Positive

Aim 3	
Definition of a model for the establishment of the European Training Antenna	
RELATED ACTIVITIES	EXPECTED OUTCOMES
3.1 Development of a multi-language training pathway, organized in two main areas: new key competences; European awareness	3.1.1 definition of training units templates

3.2 Test of training pathway and release of final product	3.2.1 peer-to-peer workshops to test the models developed
<p>Monitoring activities</p> <ul style="list-style-type: none"> • timing check Mainly carried out by IFOA staff. For the development of Matrix 2 and training units, 7 CDT (Content Development Teams) were set during the meeting in Reggio Emilia in May 2009, coordinated each by a different partner. Coordinators were in charge of keeping time checks for their CDT, under the overall supervision of the promoter. They then reported to the Networking Committee and the Development Committee during the meeting in Kaunas in December 2009. • Networking Committee meetings One meeting was scheduled for November 2009 in Kaunas. The meeting was held actually 14-15 December 2009 in Kaunas. • internal audit and reporting A full monitoring report was provided for after the meeting in Reggio Emilia, and presented during the meeting in Kaunas. On the second day of meeting, an evaluation session was delivered, as mentioned before. A full report is available at the promoter's. 	
<p>INDICATORS : <i>ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i></p>	<p><i>Rating</i></p>
<ul style="list-style-type: none"> • <i>Have all scheduled activities been performed? If not, why? (ql, et)</i> Yes. Training units have been developed according to the template agreed during the NC meeting in Reggio Emilia, pertaining both to the key competences and to the EU awareness areas, based on learning outcomes and linked to the EUTA job profile description and competences. Training units are available in English at the moment, and are still to be translated into partners' national languages. Parts of the training pathway were piloted during the meeting in Kaunas in two workshops (one about Intercultural competences and one about EU awareness). The final product will be released at the end of the project. 	<p>Positive</p> <p>Pending</p> <p>Positive</p> <p>Pending</p>
<ul style="list-style-type: none"> • <i>were all products developed? If not, why? (qt, et)</i> See previous point. 	<p>Positive</p>
<ul style="list-style-type: none"> • <i>was activity carried out on time? (ql, ec)</i> Yes. 	<p>Positive</p>
<ul style="list-style-type: none"> • <i>were at least 10 training units designed? (qt, et)</i> At present 9 training units are available, but a 10th one will probably be developed (a 2nd level intercultural unit) 	<p>Negative/ Pending</p>
<ul style="list-style-type: none"> • <i>do training units include all competencies listed according to outcomes? (ql, et)</i> Yes. 	<p>Positive</p>
<ul style="list-style-type: none"> • <i>actual number of participants involved in the workshops vs. planned number (2*10) (qt, et);</i> 19 participants attended both workshops. 	<p>Green</p>
<ul style="list-style-type: none"> • <i>actual number of certificated Antennas vs. planned number (12) (qt, et);</i> Not applicable yet. 	<p>N/A</p>
<ul style="list-style-type: none"> • <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO)</i> In line of principle yes, to any sector or country, but it is too early to say. 	<p>N/A</p>

<p>Aim 4 Promotion, exploitation and sustainability of the Network</p>	
<p>RELATED ACTIVITIES 4.1. Promotion of DOCTAE outputs</p>	<p>EXPECTED OUTCOMES 4.1.1. Project logo</p>

<p>4.2. Empowerment of network potentialities</p>	<p>4.1.2. Web site and links 4.1.3. Leaflet</p> <p>4.2.1. Links to other projects/networks (e.g. Europe Direct, SPACE) 4.2.2. Promotion to general public: exhibitions, workshops, etc. 4.2.3 Final product: EuTA CD-ROM 4.2.4. Final event 4.2.5. Multiplier effect: new projects, collaborations, partnerships, etc.</p>
<p><i>Monitoring activities</i></p> <ul style="list-style-type: none"> Networking Committee meetings All partners report on their promotion activities during meetings. Promotional and dissemination material is collected by the lead partner. Some of these activities are still yet to be developed. No audit or reporting is applicable at the moment for them. 	
<p><i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i></p>	<p><i>Rating</i></p>
<ul style="list-style-type: none"> <i>have all scheduled activities been performed? If not, why? (ql, et)</i> Activities are in line with schedule. However, products became available right before the NC meeting, and dissemination and promotion activities just started. 	<p>Positive/ Pending</p>
<ul style="list-style-type: none"> <i>were all products developed? If not, why? (qt, et)</i> The project logo, the website and the leaflet in all partners languages are available and have been delivered to partners and used for promotional purposes. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>was the dissemination activity carried out in time (ql, et) and under budget? (qt, ec)</i> Yes. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>links to the web site (qt, et)</i> Links to the web site have been made by all partners and by other related project leaders. A full list is available at IFOA's. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>number and circulation of the project brochure against planned (2.000) (ql, qt, et)</i> 1.200 copies have been printed, in all partners languages and with reference to all partner organisations. A second set will be printed by the end of the project. This would also let some allowance for adjusting promotional activities in case of need. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>number of copies of the final product (1.300) and its short version in 9 languages (qt, et);</i> Not applicable yet. 	<p>N/A</p>
<ul style="list-style-type: none"> <i>number of participants to SPACE networks events against planned (250) (qt)</i> The DOCTAE concept and products were presented during a workshop in the SPACE Autumn Conference in Nîmes in October 2009. 	<p>Pending</p>
<ul style="list-style-type: none"> <i>number of Europe Direct newsletters reporting about project (qt)</i> 4 at present, but further are coming. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>number of participants to final event (100) (qt)</i> Not applicable yet. 	<p>N/A</p>
<ul style="list-style-type: none"> <i>all countries involved in the dissemination activities? Other countries, besides the partners, involved? (ql)</i> 	<p>Green</p>

<p>Yes, all partners are collaborating. No other countries are involved at present.</p> <ul style="list-style-type: none"> • <i>did transnational partners continue to collaborate? (ql, CO)</i> Yes. Some partners presented joint proposals in the 2008 and 2009 calls of the LLP. 	Green
<ul style="list-style-type: none"> • <i>was the attitude of stakeholders towards the project theme affected by the gender of beneficiaries? How? (GE)</i> Not for the moment. 	Green
<ul style="list-style-type: none"> • <i>are project activities self-sustainable beyond its time limits? Under what conditions? (TR, ql)</i> It is probably too early to say, but in line of principle yes. Most partners are training organisations who have human and material resources and know-how to deliver training units and full programmes for the EUTA. Such programmes could be self-sustained, as could be “sold” on the market, or developed through further funding by the ESF. 	Green
<ul style="list-style-type: none"> • <i>which kind of continuity proved possible for project activities? (TR, ql)</i> It is probably too early to say, but action for exploitation of results and development of specific training material for delivery of training units (which is not among the goals of this project) could be possible future activities. Moreover, several partners are expected to take advantage of materials developed, in order to add the EUTA training programme to their offer. 	Green
<ul style="list-style-type: none"> • <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (TR)</i> In line of principle yes, to any sector or country, but it is too early to say. 	N/A

B.2.1. Process 2: Project management

<i>Sub-process</i>	
1. Agreements with partners	
<i>Activities/aspects kept under control</i>	
1.1. Sharing of roles among the Partners	
1.2. Signature of agreements	
<i>Tools</i>	
<ul style="list-style-type: none"> • Direct contacts with Partners Direct contacts were kept by the person in charge of internal evaluation with all Partners. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> • <i>all agreements signed? (ql, et)</i> All agreements were signed at the very beginning of the project performance period. Vuste Envis (CZ) withdrew at the beginning of 2009. A possible replacing partner was identified in South Zealand Business College (DK), and a request for an amendment to the grant agreement was sent by IFOA to the EACEA. Approval was granted in July 2009. 	Positive
<ul style="list-style-type: none"> • <i>any changes to the proposed draft of agreement? Of which kind? (ql, et)</i> No changes occurred. 	Positive
<ul style="list-style-type: none"> • <i>any changes to the budget? Of which kind? (ql, et)</i> By now, no changes were necessary to the approved budget. All headings are expected to stay within accepted tolerance. All partners supplied required financial documents on time. 	Positive
	<i>Rating</i>

<i>Sub-process</i>	
2. Decision-making structures	
<i>Activities/aspects kept under control</i>	
2.1. composition of the Networking Committee	
2.2. frequency and regularity of Committees meetings	
2.3. regularity of meetings proceedings	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Direct contacts were kept by the person in charge of internal evaluation with all Partners. Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> are all partners represented in the proper Committee? If not, why? (ql, et, TR) Yes, all partners appointed their representatives in the Committees. 	Rating Positive
<ul style="list-style-type: none"> are Committees meeting held according to the frequency indicated in the project? If not, why? (ql, et) Yes. 	Positive
<ul style="list-style-type: none"> are meetings proceedings regularly produced and sent to the partners? If not, why? (ql, et) Yes. Minutes are provided for each meeting in English and are sent to all partners by e-mail and uploaded in the web site. 	Positive
<ul style="list-style-type: none"> was it necessary to replace any partner? (ql, ec) Yes, as mentioned before. 	Positive
<ul style="list-style-type: none"> did all partners actively cooperate according to their assigned tasks? (TR, ql) Yes, even if with differences in the quality and timing of response, due to their varied experience in EU projects. 	Positive
<ul style="list-style-type: none"> did all transnational meeting take place in the countries they were planned to? (TR, ql) Yes, in this period. 	Positive
<ul style="list-style-type: none"> ratio female/male among members of the project management structures (preferential target 1:1; minimum 1:2) (GE, qt) The ratio in the Networking Committee is 7:6 (more than 50% of women). The ratio in the Development Committee is 11:11 (50% of women). 	Green

<i>Sub-process</i>	
3. Internal organisation	
<i>Activities/aspects kept under control</i>	
3.1. Promoter's management structure	
3.2. Partners' management structure	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Direct contacts were kept by the person in charge of internal evaluation with all Partners. Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> does the promoter's and partners' management structures fulfil what provided for in the project? (ql, et) 	Rating Green

Yes at present.	
<ul style="list-style-type: none"> <i>was it necessary to set up any other structure/figure to improve project management? (ql, et)</i> No other structure was required. Resources who left were replaced as above mentioned. 	Positive
<ul style="list-style-type: none"> <i>ratio female/male among members of the promoter and partner management structures (preferential target 1:1 minimum 1:2) (GE, qt)</i> See above, the ratio is about 1:1. 	Green

Sub-process	
4. Communication	
<i>Activities/aspects kept under control</i>	
4.1. Communication methods	
4.2. Regularity of communication	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Direct contacts were kept by the person in charge of internal evaluation with all Partners. Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<i>Rating</i>	
<ul style="list-style-type: none"> <i>average time for transmission of communications (qt, et)</i> This is intended as the time required to pass communications to partners or to circulate information among the promoter's offices. The average time for producing, translating and sending documents from 1 to 5 pages (e.g. minutes of meeting) is three days. For documents from 6 to 20 pages is ten days. For larger documents (e.g. the survey) it depends on the size of the document. The average time for circulating internal, management communication is one day or less. 	Green
<ul style="list-style-type: none"> <i>average time of response to communications (qt, et)</i> Usually, answering to partners or EC messages requires the Promoter from 1 to 3 days. Partners' answers are slower, usually from 3 to 10 days as an average, depending on the partner. 	Green
<ul style="list-style-type: none"> <i>number of paper communications vs. number of electronic communications (qt, et)</i> E-mail is the main tool used among the partners and towards the EC for short and informal communication. Paper documents are used only for official communication (which is anyway anticipated by e-mail) and for documents requiring original stamps and signatures. They represent less than 5% of the amount of communication. 	Green

Sub-process	
5. Reporting	
<i>Activities/aspects kept under control</i>	
5.1. Punctuality of the reporting activities	
5.2. Compliance of reports to the standards set by the EC	
<i>Tools</i>	
<ul style="list-style-type: none"> Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<i>Rating</i>	
<ul style="list-style-type: none"> <i>were all reports sent to the EC in time? (ql, et)</i> 	N/A

No reports had to be submitted in this period. However, contacts with the EACEA have been kept.	
<ul style="list-style-type: none"> <i>working hours devoted by the project secretary office to revise/correct/integrate reports (qt, et)</i> Since the draft version is ready, it usually takes a couple of days of work to finalise reports. Financial reporting is much heavier, specially as to collection of data from all partners. 	Green
<ul style="list-style-type: none"> <i>were EC standards and requirements fulfilled? (ql, et)</i> Yes, formally. The progress report was approved. However, the evaluation was quite low (4,5 out of 10). Except for a number of specific (and minor) issues, the partnership agreed with the evaluation, specially as to delays occurred in the first part of the performance period, that had anyway already been acknowledged in the previous monitoring report. However, the partnership did its best to catch up, and indicators seem proving that the process will be successful. The EACEA asked to participate to one of next partners' meeting for a monitoring visit, but the date set for Kaunas was not suitable for them, so representatives from the promoter will meet EACEA next January 28 in Brussels, in order to discuss and check the state of play and performance of the project. All partners have been informed during the NC meeting in Kaunas. 	Negative

<i>Sub-process</i>	
6. Time scheduling	
<i>Activities/aspects kept under control</i>	
6.1. Observance of expected deadlines for activities	
<i>Tools</i>	
<ul style="list-style-type: none"> Gantt diagram The Gantt diagram included in the application was attached to agreements with all partners and sets a reference for the scheduled activities. Internal communication Deadlines are regularly reminded to partners by e-mail and by phone. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>was it necessary to revise the scheduled time table of the project? (ql, et)</i> <i>how many times? (qt, et)</i> Not in this period, except for the date of the NC meeting, that was postponed by two weeks, in order to ensure participation of all partners. 	Positive
<ul style="list-style-type: none"> <i>was it necessary to ask the EC for prorogations? (ql, et)</i> No. We are confident we can complete all activities within the planned deadlines. The only concern is about time required for translating products into all partners national languages. 	Positive
<ul style="list-style-type: none"> <i>was it necessary to modify the objectives/activities of the project? To which extent? (ql, et)</i> Not in this period. Objectives and activities did not change. 	Positive

<i>Sub-process</i>	
7. Documents management	
<i>Activities/aspects kept under control</i>	
7.1. Set up of format standards for documents	
7.2. Documents maintenance	
7.3. Documents distribution	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits 	

A regular check on document management is carried out by the promoter's internal evaluator.	
<p>INDICATORS : <i>ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i></p>	<i>Rating</i>
<ul style="list-style-type: none"> • <i>have format standards for documentation related to the project been defined? (ql, et)</i> Yes. There are three kinds of standards, for internal and external documents. Internal documents (papers, spreadsheets, presentations, databases, etc.) must always be headed with the project name and EC code, and be "signed" and described by the author in the "properties" field (specially for Microsoft Office documents). Moreover, a standard form for fac-simile transmissions was issued. External documents must comply with EC provisions for the European logo, pay-off and disclaimer. Project products must also be written according to a standard template (font type and size, look, etc.). 	Positive
<ul style="list-style-type: none"> • <i>are they really in use? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>are all documents related to the project traceable? (ql, et)</i> Yes. An electronic copy of all documents is kept both by the head of project assistant and by the internal evaluator. A further backup copy is saved weekly. Official letters and faxes have a reference number. Financial statements are both kept by the promoter's administrative office and by the secretary office for the project. All relevant documents may also be downloaded from the DOCTAE web site. 	Positive
<ul style="list-style-type: none"> • <i>are all documents related to the project available for auditing/control purposes? (ql, et)</i> Yes. Paper copies of all documents, agreements and reports are kept by the Promoter. Originals of financial documents (i.e. invoices, receipts, etc.) are kept by each partner, while photocopies are sent to the promoter. 	Positive
<ul style="list-style-type: none"> • <i>are there any criteria for the distribution of documents? (ql, et)</i> Yes. Documents are divided into 3 categories. Private documents (i.e. agreements, specific communications, etc.) are sent only to partners involved. Internal public documents are distributed to all partners. External public documents are published on the web site or disseminated when necessary. 	Positive
<ul style="list-style-type: none"> • <i>is a distribution list always included in documents? (ql, et)</i> No. The previous criterion always applies, but there is no distribution list in documents, that is partner are not required to sign and acknowledge receipt of documents, except for official ones, like agreements with the promoter or financial statements. 	Negative

B.2.3. Process 3: Financial management

<i>Activities/aspects kept under control</i>	
1. Bank accounts	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Did the Promoter get the financial guarantee? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> <i>Did the Promoter open a separate bank account or separate accounting system for the project? (ql, et)</i> The promoter assigned a specific burden code to the project, that makes all income and expenditure related to DOCATE immediately traceable and retrievable. Advanced payments received by the EACEA are put on a bank account with no interests. 	Positive
<ul style="list-style-type: none"> <i>Did each Partner open a separate bank account for the project? (ql, et)</i> No. During the kick-off meeting this issue was raised to partners' attention. As all money transfers flow through the Promoter's account, and are therefore easily traceable, the Networking Committee decided not to ask partners to open separate accounts, which would also have resulted into higher and not justified bank charges. 	Negative

<i>Activities/aspects kept under control</i>	
2. Income	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Did co-financing Partners comply with the deadlines for payments? (ql, et)</i> Partners are compliant with payments, officially registered in the periodical financial statements and traceable at the promoter's. 	Positive
<ul style="list-style-type: none"> <i>Percentage of actual co-financing vs. expected co-financing (qt, ec)</i> Actual income is in line with the expected one: private co-financing is the 35,50% of the total. 	Green
<ul style="list-style-type: none"> <i>Are payments from the EC regular? (ql, et)</i> Yes, that is, the promoter received second pre-financing after the approval of the progress report. 	Positive
<ul style="list-style-type: none"> <i>Percentage of actual EC financing vs. expected EC financing (qt, ec)</i> 100%. The promoterwe received the second pre-financing, totalling 70% of total expected financing. 	Positive

<i>Activities/aspects kept under control</i>	
3. Expenditure	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Are payments to Partners regular? (ql, et)</i> Yes. Payments occur as soon as Partners claim the Promoter, sending financial statements provided for the reporting to the EACEA, in accordance with the agreements between the promoter and each partner, and provided that partners have fulfilled their tasks and delivered expected products. Otherwise the payment is delayed until all duties are complied with. 	Positive
<ul style="list-style-type: none"> <i>Percentage of actual payments vs. expected payments (qt, ec)</i> 100% of what claimed by Partners. 	Positive
<ul style="list-style-type: none"> <i>Are statements of accounts regular and timely? (qt, ec)</i> Yes, in this period. 	Positive
<ul style="list-style-type: none"> <i>Is there any non-eligible expenditure? (ql, et)</i> Not in our opinion. 	Positive
<ul style="list-style-type: none"> <i>Percentage of non-eligible expenditure vs. eligible expenditure (qt, ec)</i> 0% by now. A precise account of this indicator will be possible only after a feedback from the EACEA. 	Positive
<ul style="list-style-type: none"> <i>Were expenditure limits (travel, accommodation, etc.) stated in the grant agreement exceeded? (ql, ec)</i> No. Expenditure are kept under control: no limits were exceeded as far as budget headings are concerned. Nevertheless, few modifications will be needed regarding some partners' budget headings, that will not in anyway affect the overall financial balance. 	Pending

<i>Activities/aspects kept under control</i>	
4. Budget	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Is the project being carried out under budget? (ql, ec)</i> Yes. 	Positive
<ul style="list-style-type: none"> <i>Is it necessary to modify the budget? (ql, ec)</i> No. 	Positive
<ul style="list-style-type: none"> <i>How much, and under which budget headings? (qt, ec)</i> Not applicable. 	N/A

<i>Activities/aspects kept under control</i>	
5. Accounting system	
<i>Tools</i>	
<ul style="list-style-type: none"> • Internal audits Checks are made on a regular basis • Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
	<i>Rating</i>
<ul style="list-style-type: none"> • <i>Are the financial rules set in the Grant agreement all complied with? (ql, ec)</i> Yes in our opinion. 	Positive
<ul style="list-style-type: none"> • <i>Does the promoter have a computerised, working accounting system? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>Are all debits and credits identifiable? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>Are there supporting documents for every income/expenditure incurred during the project? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>Are they easily and quickly traceable and available? (ql, et)</i> Yes. The project is identified by a precise internal, electronic code for the promoter, a burden centre which makes all headings and documents easily traceable and available. 	Positive

B.3. Comments

By now, WP2 is near to completion, WP3 is ongoing and WP4 right started. Phase 1,5,6 and 7 are running. All forecasted activities are on their way, and carried out under budget.

As stated in several points in this report, the partnership is now catching up with delays that were accumulated in previous period.

It is worth to give some specific remarks on the activities carried out so far:

Process 1: Project implementation

- The achievements so far do not claim to provide a general and exhaustive overview or to draw conclusions on teachers or trainers needs *tout-court*:
 - Interviews were carried out with a limited number of people.
 - Outcomes depend very much on the country and culture of interviewees.Nevertheless, despite the different nationalities, roles and positions of people involved, some important common outcomes are arising from the survey, which might be useful for inspiring, developing and piloting approaches, methods and tools concerning the EUTA.
- Projects outcomes (tools, methods, products) are being designed and adopted taking into consideration the dimensions of “transnationality” and “complementarity”, in order to allow a fair level of comparability, transferability and sustainability. All transnational partners, despite the differences reported above, have developed and used the same tools and methodology for carrying out the survey. This approach has allowed the project to reach comparable findings, a common language (for the analysis of outcomes, the adoption of a transferable method, etc.), and a shared “platform” to propose truly transnational solutions.

Process 2-3: Project and Financial Management

As far as the management of the project is concerned, no major issues emerged in this period, and difficulties experienced in the beginning seem now left behind. The management structures are proving solid, and communication among partners is positive and effective. Each partner is involved to the required extent, and well aware of its role in the project.

Monitoring report

Period: June 2009 - December 2009

1. Framework of monitoring and evaluation activities

MONITORING

Monitoring represents a tool for project efficiency, transparency and quality. It fulfils three basic needs:

1. *rationalise* activities, to allow an effective resource allocation
2. *improve* the quality of results
3. *ease* the mainstreaming process

It is therefore a strategic tool to measure the activities undertaken and to orient their re-engineering. Monitoring:

- *assesses* the work progress
- analyses *all processes* relating to the project
- is carried on a *regular basis* surveying
- *measures* the achievement of standard targets

The strategy for monitoring deploys through the following phases:

- a. *survey* of work in progress
- b. *description* of work in progress and *elaboration* of collected data, further divided into:
 - *synchronic* elaboration, to analyse the status of the project at stated deadlines
 - *diachronic* elaboration, to analyse the trend of the project at stated deadlines
- c. *determination of any differences* between the expected and the actual project development
- d. *feedback* (highlighting of differences exceeding the acceptable allowances) and *feedforward* (interventions to adjust future actions in the project).

Monitoring applies to the following processes:

- a. implementation of activities (training, certification, etc.)
- b. project management
- c. financial management

Monitoring is carried out by the following structures and figures:

Networking Committee

It is in charge, among the others, of :

- diachronic monitoring. It controls the correctness of methodologies adopted to produce each project outcome, and outcomes themselves. It defines its own working criteria and standards to be kept
- synchronic monitoring. It controls all processes, particularly the piloting and financial ones, both locally, in every Partner's country, and globally (during meetings, where each member reports its data). It defines its own working criteria and standards to be kept.

Project Coordinator

He is an expert of monitoring and evaluation procedures. He makes criteria expressed by Committees clear, and translates them in procedures and tools. He is also in charge of monitoring the activity of the Committees.

To foster monitoring activities, specific tools will be issued, as questionnaires, focus groups, interviews carried by Delphi method, and so on. All collected data will be elaborated by computerised tools, developed ad hoc into Monitoring Reporting to Networking Committee.

EVALUATION

Evaluation (which follows and partially overlaps monitoring) is intended to answer questions such as:

- are expected objectives actually reached?
- did an improvement actually take place in trainees, by means of actions undertaken?
- how is it possible to measure, or anyway use, information collected during evaluation to re-design more effective actions?

The evaluation process aims therefore to investigate two main dimensions of the project:

- its *effectiveness*, that is the capability of reaching planned objectives;
- its *efficiency*, that is the ratio between actual results (apart from their effectiveness) and the amount of human and financial resources spent to achieve them.

With regard to this subject, the evaluation process:

- *analyses* causes of facts assessed by monitoring, discuss consequences and find possible options
- *dwells upon* critical points of the project
- occurs in *precise moments* during the project
- *measures* effectiveness and efficiency
- *couches judgements*
- is *multi-level*

Possible constraints will be also taken into account, as for example:

- different normative and territorial contexts;
- the fact that occupational, social and economical effects of active ageing policies may be verified only on a long term basis, and are strongly influenced by other factors, that lie outside the scope of our project.

This means that sometimes only potential effects of the project might be investigated.

Evaluation applies to the same processes as monitoring, and will proceed on its results basis.

Evaluation will basically be an *internal* one, being the external one committed to monitoring and evaluation activities carried out by the Commission, which will represent an essential contribution to the project.

Anyway, the number and the composition of the partnership is wide and skilled enough to assure effectiveness and objectiveness of evaluation.

Nevertheless, two different levels of internal evaluation are envisaged:

1. a self-evaluation level, provided for by the Scientific and the Steering Committee, during their meetings;
2. an evaluation level (comparable to internal auditing according to ISO 9000:2000) assured by the evaluation expert. This will occur three times on-going, and once at the end of the project.

Again, specific tools will be issued for evaluation purposes, according to what we said before about monitoring.

Each evaluation activity will give rise to a specific report.

In the following pages, a general planning for monitoring and evaluation activities is provided for. This planning was submitted to and approved by the Steering Committee and the Transnational Coordination Committee during their kick-off meetings: this ensures a sort of mutual agreement on aims and deployment of the activities between the Committee and the evaluator.

Process 1: Project implementation

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
1. To support a new professionalism for trainers in a life-long and globalized context	<p>1.1. Survey of existing, up-to-date EU sources and guidelines on quality of VET teachers/trainers competences and qualifications</p> <p>1.2. analysis and mapping of trainers' new competences needs</p>	<p>1.1.1. report on national systems of quality and recognition of teachers/trainers competences</p> <p>1.1.2. Devise of a Reference Framework of EU sources and guidelines</p> <p>1.2.1. Devising of a questionnaire</p> <p>1.2.2. Field research: needs' analysis</p> <p>1.2.3. Matrix 1: mapping of new competencies emerged</p>	<ul style="list-style-type: none"> • time • number of teachers/trainers available and willing to participate • consistence and homogeneity of surveys lead by each partner 	<ul style="list-style-type: none"> • have all scheduled activities been performed? If not, why? (ql, et) • were all products developed? If not, why? (qt, et) • was activity carried out on time? (ql, ec) • did the expected number of trainers/teachers answer? (qt, et) • did the target group consider the tools effective enough? (ql, et) • actual number of teachers/trainers involved in the needs analysis vs. planned number (250) (qt, et); • are tools and findings comparable, transferable (TR) and compliant with the objectives? (ql, et) • percentage of women among the beneficiaries as related to the average 	<ul style="list-style-type: none"> • timing check • review of outcomes • internal audit and reporting 	<ul style="list-style-type: none"> • Networking Committee • National Project Teams • Project Coordinator

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
				in the involved sectors. (qt, GE) <ul style="list-style-type: none"> • did the developed material consider the gender issue? (ql, GE) • was the attitude of beneficiaries towards the project theme affected by gender? How? (ql, GE) • are project activities self-sustainable beyond its time limits? Under what conditions? (ql, CO) • are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (ql, CO) 		
2. Profiling the European Training Antenna	2.1. Job description of the profile of the European Training Antenna 2.2. Drafting of the Certificate of the	2.1.1. Matrix 2: matching of the outcomes of the surveying phase 2.1.2. Detailed job description of the EuTA: competencies and tasks expected 2.2.1. Certificate of the EuTA	<ul style="list-style-type: none"> • Time • homogeneity of concepts • differences among partners' national regulations 	<ul style="list-style-type: none"> • have all scheduled activities been performed? If not, why? (ql, et) • were all products developed? If not, why? (qt, et) • was activity carried out on time? (ql, ec) • are the products developed compliant with any existing 	<ul style="list-style-type: none"> • timing check • Networking Committee meetings • internal audit and reporting 	<ul style="list-style-type: none"> • Networking Committee • National Project Teams • Project Coordinator

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
	EuTA	<p>professional profile (model for the recognition of competences standards)</p> <p>2.2.2. Guide containing the rationale of the model, instructions for use, requirements for certification, explanation of steps to take, etc.</p>		<p>national/European standard? (ql, et, TR)</p> <ul style="list-style-type: none"> are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO) 		
3. Definition of a model for the establishment of the European Training Antenna	<p>3.1 Development of a multi-language training pathway, organized in two main areas: new key competences; European awareness</p> <p>3.2 Test of training pathway and release of final product</p>	<p>3.1.1 definition of training units templates</p> <p>3.2.1 peer-to-peer workshops to test the models developed</p>	<ul style="list-style-type: none"> time 	<ul style="list-style-type: none"> have all scheduled activities been performed? If not, why? (ql, et) were all products developed? If not, why? (qt, et) was activity carried out on time? (ql, ec) were at least 10 training units designed? (qt, et) do training units include all competencies listed according to outcomes? (ql, et) 	<ul style="list-style-type: none"> timing check Networking Committee meetings internal audit and reporting 	<ul style="list-style-type: none"> Networking Committee National Project Teams Project Coordinator

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
				<ul style="list-style-type: none"> actual number of participants involved in the workshops vs. planned number (2*10) (qt, et); actual number of certificated Antennas vs. planned number (12) (qt, et); are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO) 		
4. Promotion, exploitation and sustainability of the Network	4.1. Promotion of DOCTAE outputs 4.2. Empowerment of network potentialities	4.1.1. Project logo 4.1.2. Web site and links 4.1.3. Leaflet 4.2.1. Links to other projects/networks (e.g. Europe Direct, SPACE) 4.2.2. Promotion to general public: exhibitions, workshops, etc. 4.2.3 Final product:	<ul style="list-style-type: none"> costs time willingness of other stakeholders to develop further initiatives 	<ul style="list-style-type: none"> have all scheduled activities been performed? If not, why? (ql, et) were all products developed? If not, why? (qt, et) was the dissemination activity carried out in time (ql, et) and under budget? (qt, ec) links to the web site (qt, et) number and circulation of the project brochure against planned (2.000) (ql, qt, et) 	<ul style="list-style-type: none"> Networking Committee meetings internal auditing reporting 	<ul style="list-style-type: none"> Project coordinator Partners

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
		EuTA CD-ROM 4.2.4. Final event 4.2.5. Multiplier effect: new projects, collaborations, partnerships, etc.		<ul style="list-style-type: none"> • number of copies of the final product (1.300) and its short version in 9 languages (qt, et); (TR) <ul style="list-style-type: none"> • number of participants to SPACE networks events against planned (250) (qt) • number of Europe Direct newsletters reporting about project (qt) • number of participants to Final Event (100) • all countries involved in the dissemination activities? Other countries, beside the partners, involved? • did transnational partners continue to collaborate? (GE) <ul style="list-style-type: none"> • was the attitude of stakeholders towards the project theme affected by the gender of beneficiaries? How? 		

INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity

AIMS OF THE PROJECT	RELATED ACTIVITIES	OUTCOMES	CRITICAL POINTS	INDICATORS	M&E ACTIVITIES	HR INVOLVED
				(CO) <ul style="list-style-type: none"> • are project activities self-sustainable beyond its time limits? Under what conditions? • which kind of continuity proved possible for project activities? • are methodologies and tools developed during the project transferable to other projects /sectors/ countries (TR)? Which? Under what conditions? 		

1.2. Process 2: Project management

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity

SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
1. Agreements with partners	1.1. sharing of roles among the Partners 1.2. signature of agreements	<ul style="list-style-type: none"> all agreements signed? (ql, et) any changes to the proposed draft of agreement? Of which kind? (ql, et) any changes to the budget? Of which kind? (ql, et) 	<ul style="list-style-type: none"> direct contact with partners 	<ul style="list-style-type: none"> Lead Partner (Project coordinator + staff)
2. Decision-making structures	2.1. composition of the Networking Committee 2.2. frequency and regularity of Committees meetings 2.3. regularity of meetings proceedings	<ul style="list-style-type: none"> are all partners represented in the proper Committee? If not, why? (ql, et, TR) are Committees meeting held according to the frequency indicated in the project? If no, why? (ql, et) are meetings proceedings regularly produced and sent to the partners? If not, 	<ul style="list-style-type: none"> internal audits direct feedback to the Lead Partner 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff) Evaluation expert

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity				
SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		why? (ql, et) <ul style="list-style-type: none"> was it necessary to replace any partner? (TR) did all partners actively cooperate according to their assigned tasks? did all transnational meeting take place in the countries they were planned to? (GE, qt) ratio male/female among members of the project management structures (preferential target 1:1; minimum 1:2) 		
3. Internal organisation	3.1. promoter's management structure 3.2. partners' management structure	<ul style="list-style-type: none"> does the promoter's and partners' management structures fulfil what provided for in the project? (ql, et) was it necessary to set up any other structure/figure to 	<ul style="list-style-type: none"> internal audits direct feedback to the Promoter 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff) Networking Committee Evaluation expert

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity

SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		improve project management? (ql, et) <ul style="list-style-type: none"> ratio male/female among members of the promoter and partner management structures (preferential target 1:1; minimum 1:2) (GE, qt) 		
4. Communication	4.1. communication methods 4.2. regularity of communication	<ul style="list-style-type: none"> average time for transmission of communications (ql, et) average time of response to communications (qt, et) number of paper communications vs. number of electronic communications (qt, et) 	<ul style="list-style-type: none"> internal audits direct feedback to the Promoter 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff) Partners Evaluation expert
5. Reporting	5.1. punctuality of the reporting activities 5.2. compliance of reports to the standards set by the EC	<ul style="list-style-type: none"> were all reports sent to the EC in time? (ql, et) working hours devoted by the project secretary office to 	<ul style="list-style-type: none"> direct feedback to the Promoter 	<ul style="list-style-type: none"> Lead Partner (Project Coordinator + staff)

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity				
SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		revise/correct/integrate reports (qt, et) <ul style="list-style-type: none"> were EC standards and requirements fulfilled? (ql, et) 		
6. Time scheduling	6.1. observance of expected deadlines for activities	<ul style="list-style-type: none"> was it necessary to revise the scheduled timetable of the project? (ql, et) How many times? (qt, et) was it necessary to ask the EC for prorogations? (ql, et) was it necessary to modify the objectives/activities of the project? To which extent? (ql, et) 	<ul style="list-style-type: none"> Gantt diagram Internal communication 	<ul style="list-style-type: none"> Lead Partner Networking Committee
7. Documents management	7.1. set up of standards for documents 7.2. documents maintenance 7.3. documents distribution	<ul style="list-style-type: none"> have format standards for documentation related to the project been defined? (ql, et) are they really in use? (ql, et) are all documents related to the project traceable? (ql, et) are all documents related to the project available for auditing/control purposes? 	<ul style="list-style-type: none"> internal audits 	<ul style="list-style-type: none"> Evaluation expert

INDICATORS : ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR= transnationality; GE=gender dimension; CO=complementarity

SUB-PROCESSES	ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
		(ql, et) <ul style="list-style-type: none"> • are there any criteria for the distribution of documents? (ql, et) • is a distribution list always included in documents? (ql, et) 		

1.3. Process 3: Financial management

ACTIVITIES/ASPECTS KEPT UNDER CONTROL	INDICATORS (ql = qualitative, qt=quantitative, et=effectiveness, ec=efficiency)	EVALUATION TOOLS	HUMAN RESOURCES INVOLVED
1. Bank accounts	<ul style="list-style-type: none"> • Did the Promoter get the financial guarantee? (ql, et) • Did the Promoter open a separate bank account or separate accounting system for the project? (ql, et) • Did each Partner open a separate bank account or separate accounting system for the project? (ql, et) 		
2. Income	<ul style="list-style-type: none"> • Did co-financing Partners comply with the deadlines for payments? (ql, et) • Percentage of actual co-financing vs. expected co-financing (qt, ec) • Are payments from the EC regular? (ql, et) • Percentage of actual EC financing vs. expected EC financing (qt, ec) 		
3. Expenditure	<ul style="list-style-type: none"> • Are payments to Partners regular? (ql, et) • Percentage of actual payments vs. expected payments (qt, ec) • Are statements of accounts regular and timely? (qt, ec) • Is there any non-eligible expenditure? (ql, et) • Percentage of non-eligible expenditure vs. eligible expenditure (qt, ec) • Were expenditure limits (travel, accommodation, etc.) stated in the grant agreement exceeded? (ql, ec) 	<ul style="list-style-type: none"> • internal audits • Promoter's accounting system • external audit 	<ul style="list-style-type: none"> • Lead Partner (administrative office) • Partners (administrative offices) • Evaluation expert
4. Budget	<ul style="list-style-type: none"> • Is the project being carried out under budget? (ql, ec) • Is it necessary to modify the budget? (ql, ec) • How much, and under which budget headings? (qt, ec) 		
5. Accounting system	<ul style="list-style-type: none"> • Are the financial rules set in the Grant agreement all complied with? (ql, ec) • Does the promoter have a computerised, working accounting system? (ql, et) • Are all debts and credits identifiable? (ql, et) • Are there supporting documents for every income/expenditure incurred during the project? (ql, et) • Are they easily and quickly traceable and available? (ql, et) 		

2. State of play

In the following pages an account is given on how monitoring and evaluation activities are going on, and how and if (and if not, why) success indicators are being fulfilled.

This state of play of course refers to the period covered by the present report, i.e. from June 2009 (immediately after the partners' meeting in Reggio Emilia - IT) to December 2009 (immediately after the partners' meeting in Kaunas - LT).

Qualitative indicators are rated on an on/off/stand by (positive/negative/pending) basis.

Quantitative indicators are rated by numeric values, and an overall evaluation is given with a "traffic-light" signal, i.e.:

- green = goals were fulfilled
- yellow = goals were not completely fulfilled, or not exactly in time, or not yet
- red = there is a considerable gap between expected and actual results.

The above indicators, when applicable, are followed by the dimension of:

- Transnationality = TR
- Gender = GE
- Complementarity = CO

B.2.1. Process 1: Project implementation

<i>Aim 1</i>	
To support a new professionalism for trainers in a life-long and globalized context	
<i>RELATED ACTIVITIES</i>	<i>EXPECTED OUTCOMES</i>
1.1 Survey of existing, up-to-date EU sources and guidelines on quality of VET teachers/trainers competences and qualifications	1.1.1. Report on national systems of quality and recognition of teachers/trainers competences 1.1.2. Devise of a Reference Framework of EU sources and guidelines
1.2 Analysis and mapping of trainers' new competences needs	1.2.1. Devising of a questionnaire 1.2.2. Field research: needs' analysis 1.2.3. Matrix 1: mapping of new competencies emerged
<p><i>Monitoring activities</i></p> <ul style="list-style-type: none"> • Timing check Mainly carried out by IFOA staff. • Review of outcomes 1.1.2. Completed (see previous report) 1.2.1. Completed (see previous report) • Internal Audit and Reporting Activities and finance were checked in order to endure a smooth running of activities and verifying the need for changes to timetable and/or budget. The state of play was presented during the partners' meeting in Kaunas (LT), where also an evaluation session was held, in order to start self-assessing project outcomes, management and impact. 	
<p><i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i></p>	
• <i>have all scheduled activities been performed? If not, why? (ql, et)</i> All activities pertaining to this phase were completed.	Rating Green
• <i>were all products developed? If not, why? (qt, et)</i> The survey was completed and results compared.	Green
• <i>was activity carried out on time? (ql, ec)</i> Yes, previous delays were caught up with.	Green

<ul style="list-style-type: none"> • <i>did the expected number of trainers/teachers answer? (qt, et)</i> Yes. See previous report. 	Green
<ul style="list-style-type: none"> • <i>did the target group consider the tools effective enough? (ql, et)</i> Yes. See previous report. 	Positive
<ul style="list-style-type: none"> • <i>actual number of teachers/trainers involved in the needs analysis vs. planned number (250) (qt, et);</i> 252 people were involved in the survey, in line with what planned. 	Green
<ul style="list-style-type: none"> • <i>are tools and findings comparable, transferable (TR) and compliant with the objectives? (ql, et)</i> Yes. See previous report. 	Positive
<ul style="list-style-type: none"> • <i>actual percentage of women among the beneficiaries as related to the average in the involved sectors (GE, qt)</i> Yes. See previous report. 	Green
<ul style="list-style-type: none"> • <i>did the developed material consider the gender issue? (GE, ql)</i> Not directly. See previous report. 	Negative
<ul style="list-style-type: none"> • <i>was the attitude of beneficiaries towards the project theme affected by gender? How? (GE, ql)</i> No. See previous report. 	Positive
<ul style="list-style-type: none"> • <i>are project activities self-sustainable beyond its time limits? Under what conditions? (CO, ql)</i> The survey should be kept up-to-date regularly, which requires an effort by partners also in the future. True it is, however, that detailed information on the evolution of national systems can be found for example at Cedefop's website¹. The needs analysis results, on the other side, strongly depend on the sample of respondents, the context and the timing. Needs may change fast, therefore it should be carried out again, at least in order to assess differences with the present situation. The tool (questionnaire) could be made more detailed for some aspects, and could take advantage from the set of knowledge, skills, attitude existing in the EUTA job profile. Of course, it should be kept as lean and easy to answer as possible, in order not to frighten or bore interviewees. Accompanying the questionnaire compilation with a direct interview is strongly recommended, even if this brings to higher costs. 	Partially positive
<ul style="list-style-type: none"> • <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO, ql)</i> Yes, the tools and methods adopted seem transferable (adaptable) to other countries and possibly sectors. However, conditions for an effective transferability could be assessed only at the end of the project cycle. 	Positive

Aim 2	
Profiling the European Training Antenna	
RELATED ACTIVITIES	EXPECTED OUTCOMES
2.1 Job description of the profile of the European Training Antenna	2.1.3. Matrix 2: matching of the outcomes of the surveying phase 2.1.4. Detailed job description of the EuTA: competencies and tasks expected
2.2 Drafting of the Certificate of the EuTA	2.2.1. Certificate of the EuTA professional profile (model for the recognition of

¹ QUI INDIRIZZO WEB CEDEFOP

	competences standards) 2.2.2. Guide containing the rationale of the model, instructions for use, requirements for certification, explanation of steps to take, etc.
Monitoring activities <ul style="list-style-type: none"> Timing check Mainly carried out by IFOA staff. Networking Committee meetings The Networking Committee met in Kaunas (LT) in December 2009. There, the state of play was examined thoroughly by partners, and a specific evaluation session with ad hoc developed material was carried out. Internal Audit and Reporting Activities and finance were checked in order to endure a smooth running of activities and verifying the need for changes to timetable and/or budget. The state of play was presented during the partners' meeting in Kaunas (LT), where also an evaluation session was held, in order to start self-assessing project outcomes, management and impact. 	
INDICATORS : <i>ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> <i>have all scheduled activities been performed? If not, why? (ql, et)</i> Delays accumulated in the first part of the project performance period were substantially caught up with, and the project is now performing 90% on schedule. 	Positive
<ul style="list-style-type: none"> <i>were all products developed? If not, why? (qt, et)</i> Matrix 2 is completed, listing competences domains for the EUTA. The job profile has been developed accordingly, mixing the bottom-up results of the survey and the top-down framework deriving from official documents and institutions. The EUTA certificate has been defined. The guide accompanying the certificate has still to be developed, as it must include references to training units, that were completed just in time for the meeting in Kaunas. 	Green Yellow
<ul style="list-style-type: none"> <i>was activity carried out on time? (ql, ec)</i> Time used to complete tasks (duration of activities) is now in line with plans. 	Positive
<ul style="list-style-type: none"> <i>are the products developed compliant with any existing national/European standard? (ql, et, TR)</i> Yes. Products are being developed in line with Europass, the EQF, the ECVET. 	Positive
<ul style="list-style-type: none"> <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO, ql)</i> Yes, specially given the compliance with EU standards, the tools and methods adopted seem transferable (adaptable) to other countries and possibly sectors. However, conditions for an effective transferability could be assessed only at the end of the project cycle. 	Positive

Aim 3	
Definition of a model for the establishment of the European Training Antenna	
RELATED ACTIVITIES	EXPECTED OUTCOMES
3.1 Development of a multi-language training pathway, organized in two main areas: new key competences; European awareness	3.1.1 definition of training units templates

3.2 Test of training pathway and release of final product	3.2.1 peer-to-peer workshops to test the models developed
<p><i>Monitoring activities</i></p> <ul style="list-style-type: none"> • timing check Mainly carried out by IFOA staff. For the development of Matrix 2 and training units, 7 CDT (Content Development Teams) were set during the meeting in Reggio Emilia in May 2009, coordinated each by a different partner. Coordinators were in charge of keeping time checks for their CDT, under the overall supervision of the promoter. They then reported to the Networking Committee and the Development Committee during the meeting in Kaunas in December 2009. • Networking Committee meetings One meeting was scheduled for November 2009 in Kaunas. The meeting was held actually 14-15 December 2009 in Kaunas. • internal audit and reporting A full monitoring report was provided for after the meeting in Reggio Emilia, and presented during the meeting in Kaunas. On the second day of meeting, an evaluation session was delivered, as mentioned before. A full report is available at the promoter's. 	
<p><i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i></p>	<p><i>Rating</i></p>
<ul style="list-style-type: none"> • <i>Have all scheduled activities been performed? If not, why? (ql, et)</i> Yes. Training units have been developed according to the template agreed during the NC meeting in Reggio Emilia, pertaining both to the key competences and to the EU awareness areas, based on learning outcomes and linked to the EUTA job profile description and competences. Training units are available in English at the moment, and are still to be translated into partners' national languages. Parts of the training pathway were piloted during the meeting in Kaunas in two workshops (one about Intercultural competences and one about EU awareness). The final product will be released at the end of the project. 	<p>Positive</p> <p>Pending</p> <p>Positive</p> <p>Pending</p>
<ul style="list-style-type: none"> • <i>were all products developed? If not, why? (qt, et)</i> See previous point. 	<p>Positive</p>
<ul style="list-style-type: none"> • <i>was activity carried out on time? (ql, ec)</i> Yes. 	<p>Positive</p>
<ul style="list-style-type: none"> • <i>were at least 10 training units designed? (qt, et)</i> At present 9 training units are available, but a 10th one will probably be developed (a 2nd level intercultural unit) 	<p>Negative/ Pending</p>
<ul style="list-style-type: none"> • <i>do training units include all competencies listed according to outcomes? (ql, et)</i> Yes. 	<p>Positive</p>
<ul style="list-style-type: none"> • <i>actual number of participants involved in the workshops vs. planned number (2*10) (qt, et);</i> 19 participants attended both workshops. 	<p>Green</p>
<ul style="list-style-type: none"> • <i>actual number of certificated Antennas vs. planned number (12) (qt, et);</i> Not applicable yet. 	<p>N/A</p>
<ul style="list-style-type: none"> • <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (CO)</i> In line of principle yes, to any sector or country, but it is too early to say. 	<p>N/A</p>

<p>Aim 4 Promotion, exploitation and sustainability of the Network</p>	
<p><i>RELATED ACTIVITIES</i> 4.1. Promotion of DOCTAE outputs</p>	<p><i>EXPECTED OUTCOMES</i> 4.1.1. Project logo</p>

<p>4.2. Empowerment of network potentialities</p>	<p>4.1.2. Web site and links 4.1.3. Leaflet</p> <p>4.2.1. Links to other projects/networks (e.g. Europe Direct, SPACE) 4.2.2. Promotion to general public: exhibitions, workshops, etc. 4.2.3 Final product: EuTA CD-ROM 4.2.4. Final event 4.2.5. Multiplier effect: new projects, collaborations, partnerships, etc.</p>
<p><i>Monitoring activities</i></p> <ul style="list-style-type: none"> Networking Committee meetings All partners report on their promotion activities during meetings. Promotional and dissemination material is collected by the lead partner. Some of these activities are still yet to be developed. No audit or reporting is applicable at the moment for them. 	
<p><i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i></p>	<p><i>Rating</i></p>
<ul style="list-style-type: none"> <i>have all scheduled activities been performed? If not, why? (ql, et)</i> Activities are in line with schedule. However, products became available right before the NC meeting, and dissemination and promotion activities just started. 	<p>Positive/ Pending</p>
<ul style="list-style-type: none"> <i>were all products developed? If not, why? (qt, et)</i> The project logo, the website and the leaflet in all partners languages are available and have been delivered to partners and used for promotional purposes. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>was the dissemination activity carried out in time (ql, et) and under budget? (qt, ec)</i> Yes. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>links to the web site (qt, et)</i> Links to the web site have been made by all partners and by other related project leaders. A full list is available at IFOA's. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>number and circulation of the project brochure against planned (2.000) (ql, qt, et)</i> 1.200 copies have been printed, in all partners languages and with reference to all partner organisations. A second set will be printed by the end of the project. This would also let some allowance for adjusting promotional activities in case of need. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>number of copies of the final product (1.300) and its short version in 9 languages (qt, et);</i> Not applicable yet. 	<p>N/A</p>
<ul style="list-style-type: none"> <i>number of participants to SPACE networks events against planned (250) (qt)</i> The DOCTAE concept and products were presented during a workshop in the SPACE Autumn Conference in Nîmes in October 2009. 	<p>Pending</p>
<ul style="list-style-type: none"> <i>number of Europe Direct newsletters reporting about project (qt)</i> 4 at present, but further are coming. 	<p>Positive</p>
<ul style="list-style-type: none"> <i>number of participants to final event (100) (qt)</i> Not applicable yet. 	<p>N/A</p>
<ul style="list-style-type: none"> <i>all countries involved in the dissemination activities? Other countries, besides the partners, involved? (ql)</i> 	<p>Green</p>

<p>Yes, all partners are collaborating. No other countries are involved at present.</p> <ul style="list-style-type: none"> • <i>did transnational partners continue to collaborate? (ql, CO)</i> Yes. Some partners presented joint proposals in the 2008 and 2009 calls of the LLP. 	Green
<ul style="list-style-type: none"> • <i>was the attitude of stakeholders towards the project theme affected by the gender of beneficiaries? How? (GE)</i> Not for the moment. 	Green
<ul style="list-style-type: none"> • <i>are project activities self-sustainable beyond its time limits? Under what conditions? (TR, ql)</i> It is probably too early to say, but in line of principle yes. Most partners are training organisations who have human and material resources and know-how to deliver training units and full programmes for the EUTA. Such programmes could be self-sustained, as could be “sold” on the market, or developed through further funding by the ESF. 	Green
<ul style="list-style-type: none"> • <i>which kind of continuity proved possible for project activities? (TR, ql)</i> It is probably too early to say, but action for exploitation of results and development of specific training material for delivery of training units (which is not among the goals of this project) could be possible future activities. Moreover, several partners are expected to take advantage of materials developed, in order to add the EUTA training programme to their offer. 	Green
<ul style="list-style-type: none"> • <i>are methodologies and tools developed during the project transferable to other sectors/countries? Which? Under what conditions? (TR)</i> In line of principle yes, to any sector or country, but it is too early to say. 	N/A

B.2.1. Process 2: Project management

<i>Sub-process</i>	
1. Agreements with partners	
<i>Activities/aspects kept under control</i>	
1.1. Sharing of roles among the Partners	
1.2. Signature of agreements	
<i>Tools</i>	
<ul style="list-style-type: none"> • Direct contacts with Partners Direct contacts were kept by the person in charge of internal evaluation with all Partners. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> • <i>all agreements signed? (ql, et)</i> All agreements were signed at the very beginning of the project performance period. Vuste Envis (CZ) withdrew at the beginning of 2009. A possible replacing partner was identified in South Zealand Business College (DK), and a request for an amendment to the grant agreement was sent by IFOA to the EACEA. Approval was granted in July 2009. 	Positive
<ul style="list-style-type: none"> • <i>any changes to the proposed draft of agreement? Of which kind? (ql, et)</i> No changes occurred. 	Positive
<ul style="list-style-type: none"> • <i>any changes to the budget? Of which kind? (ql, et)</i> By now, no changes were necessary to the approved budget. All headings are expected to stay within accepted tolerance. All partners supplied required financial documents on time. 	Positive
<i>Rating</i>	

<i>Sub-process</i>	
2. Decision-making structures	
<i>Activities/aspects kept under control</i>	
2.1. composition of the Networking Committee	
2.2. frequency and regularity of Committees meetings	
2.3. regularity of meetings proceedings	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Direct contacts were kept by the person in charge of internal evaluation with all Partners. Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> are all partners represented in the proper Committee? If not, why? (ql, et, TR) Yes, all partners appointed their representatives in the Committees. 	Rating Positive
<ul style="list-style-type: none"> are Committees meeting held according to the frequency indicated in the project? If not, why? (ql, et) Yes. 	Positive
<ul style="list-style-type: none"> are meetings proceedings regularly produced and sent to the partners? If not, why? (ql, et) Yes. Minutes are provided for each meeting in English and are sent to all partners by e-mail and uploaded in the web site. 	Positive
<ul style="list-style-type: none"> was it necessary to replace any partner? (ql, ec) Yes, as mentioned before. 	Positive
<ul style="list-style-type: none"> did all partners actively cooperate according to their assigned tasks? (TR, ql) Yes, even if with differences in the quality and timing of response, due to their varied experience in EU projects. 	Positive
<ul style="list-style-type: none"> did all transnational meeting take place in the countries they were planned to? (TR, ql) Yes, in this period. 	Positive
<ul style="list-style-type: none"> ratio female/male among members of the project management structures (preferential target 1:1; minimum 1:2) (GE, qt) The ratio in the Networking Committee is 7:6 (more than 50% of women). The ratio in the Development Committee is 11:11 (50% of women). 	Green

<i>Sub-process</i>	
3. Internal organisation	
<i>Activities/aspects kept under control</i>	
3.1. Promoter's management structure	
3.2. Partners' management structure	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Direct contacts were kept by the person in charge of internal evaluation with all Partners. Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<ul style="list-style-type: none"> does the promoter's and partners' management structures fulfil what provided for in the project? (ql, et) 	Rating Green

Yes at present.	
<ul style="list-style-type: none"> <i>was it necessary to set up any other structure/figure to improve project management? (ql, et)</i> No other structure was required. Resources who left were replaced as above mentioned. 	Positive
<ul style="list-style-type: none"> <i>ratio female/male among members of the promoter and partner management structures (preferential target 1:1 minimum 1:2) (GE, qt)</i> See above, the ratio is about 1:1. 	Green

Sub-process	
4. Communication	
<i>Activities/aspects kept under control</i>	
4.1. Communication methods	
4.2. Regularity of communication	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Direct contacts were kept by the person in charge of internal evaluation with all Partners. Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<i>Rating</i>	
<ul style="list-style-type: none"> <i>average time for transmission of communications (qt, et)</i> This is intended as the time required to pass communications to partners or to circulate information among the promoter's offices. The average time for producing, translating and sending documents from 1 to 5 pages (e.g. minutes of meeting) is three days. For documents from 6 to 20 pages is ten days. For larger documents (e.g. the survey) it depends on the size of the document. The average time for circulating internal, management communication is one day or less. 	Green
<ul style="list-style-type: none"> <i>average time of response to communications (qt, et)</i> Usually, answering to partners or EC messages requires the Promoter from 1 to 3 days. Partners' answers are slower, usually from 3 to 10 days as an average, depending on the partner. 	Green
<ul style="list-style-type: none"> <i>number of paper communications vs. number of electronic communications (qt, et)</i> E-mail is the main tool used among the partners and towards the EC for short and informal communication. Paper documents are used only for official communication (which is anyway anticipated by e-mail) and for documents requiring original stamps and signatures. They represent less than 5% of the amount of communication. 	Green

Sub-process	
5. Reporting	
<i>Activities/aspects kept under control</i>	
5.1. Punctuality of the reporting activities	
5.2. Compliance of reports to the standards set by the EC	
<i>Tools</i>	
<ul style="list-style-type: none"> Direct feedback to the Promoter No particular issues were raised. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
<i>Rating</i>	
<ul style="list-style-type: none"> <i>were all reports sent to the EC in time? (ql, et)</i> 	N/A

No reports had to be submitted in this period. However, contacts with the EACEA have been kept.	
<ul style="list-style-type: none"> <i>working hours devoted by the project secretary office to revise/correct/integrate reports (qt, et)</i> Since the draft version is ready, it usually takes a couple of days of work to finalise reports. Financial reporting is much heavier, specially as to collection of data from all partners. 	Green
<ul style="list-style-type: none"> <i>were EC standards and requirements fulfilled? (ql, et)</i> Yes, formally. The progress report was approved. However, the evaluation was quite low (4,5 out of 10). Except for a number of specific (and minor) issues, the partnership agreed with the evaluation, specially as to delays occurred in the first part of the performance period, that had anyway already been acknowledged in the previous monitoring report. However, the partnership did its best to catch up, and indicators seem proving that the process will be successful. The EACEA asked to participate to one of next partners' meeting for a monitoring visit, but the date set for Kaunas was not suitable for them, so representatives from the promoter will meet EACEA next January 28 in Brussels, in order to discuss and check the state of play and performance of the project. All partners have been informed during the NC meeting in Kaunas. 	Negative

<i>Sub-process</i>	
6. Time scheduling	
<i>Activities/aspects kept under control</i>	
6.1. Observance of expected deadlines for activities	
<i>Tools</i>	
<ul style="list-style-type: none"> Gantt diagram The Gantt diagram included in the application was attached to agreements with all partners and sets a reference for the scheduled activities. Internal communication Deadlines are regularly reminded to partners by e-mail and by phone. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>was it necessary to revise the scheduled time table of the project? (ql, et)</i> <i>how many times? (qt, et)</i> Not in this period, except for the date of the NC meeting, that was postponed by two weeks, in order to ensure participation of all partners. 	Positive
<ul style="list-style-type: none"> <i>was it necessary to ask the EC for prorogations? (ql, et)</i> No. We are confident we can complete all activities within the planned deadlines. The only concern is about time required for translating products into all partners national languages. 	Positive
<ul style="list-style-type: none"> <i>was it necessary to modify the objectives/activities of the project? To which extent? (ql, et)</i> Not in this period. Objectives and activities did not change. 	Positive

<i>Sub-process</i>	
7. Documents management	
<i>Activities/aspects kept under control</i>	
7.1. Set up of format standards for documents	
7.2. Documents maintenance	
7.3. Documents distribution	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits 	

A regular check on document management is carried out by the promoter's internal evaluator.	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> • <i>have format standards for documentation related to the project been defined? (ql, et)</i> Yes. There are three kinds of standards, for internal and external documents. Internal documents (papers, spreadsheets, presentations, databases, etc.) must always be headed with the project name and EC code, and be "signed" and described by the author in the "properties" field (specially for Microsoft Office documents). Moreover, a standard form for fac-simile transmissions was issued. External documents must comply with EC provisions for the European logo, pay-off and disclaimer. Project products must also be written according to a standard template (font type and size, look, etc.). 	Positive
<ul style="list-style-type: none"> • <i>are they really in use? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>are all documents related to the project traceable? (ql, et)</i> Yes. An electronic copy of all documents is kept both by the head of project assistant and by the internal evaluator. A further backup copy is saved weekly. Official letters and faxes have a reference number. Financial statements are both kept by the promoter's administrative office and by the secretary office for the project. All relevant documents may also be downloaded from the DOCTAE web site. 	Positive
<ul style="list-style-type: none"> • <i>are all documents related to the project available for auditing/control purposes? (ql, et)</i> Yes. Paper copies of all documents, agreements and reports are kept by the Promoter. Originals of financial documents (i.e. invoices, receipts, etc.) are kept by each partner, while photocopies are sent to the promoter. 	Positive
<ul style="list-style-type: none"> • <i>are there any criteria for the distribution of documents? (ql, et)</i> Yes. Documents are divided into 3 categories. Private documents (i.e. agreements, specific communications, etc.) are sent only to partners involved. Internal public documents are distributed to all partners. External public documents are published on the web site or disseminated when necessary. 	Positive
<ul style="list-style-type: none"> • <i>is a distribution list always included in documents? (ql, et)</i> No. The previous criterion always applies, but there is no distribution list in documents, that is partner are not required to sign and acknowledge receipt of documents, except for official ones, like agreements with the promoter or financial statements. 	Negative

B.2.3. Process 3: Financial management

<i>Activities/aspects kept under control</i>	
1. Bank accounts	
<i>Tools</i> <ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Did the Promoter get the financial guarantee? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> <i>Did the Promoter open a separate bank account or separate accounting system for the project? (ql, et)</i> The promoter assigned a specific burden code to the project, that makes all income and expenditure related to DOCATE immediately traceable and retrievable. Advanced payments received by the EACEA are put on a bank account with no interests. 	Positive
<ul style="list-style-type: none"> <i>Did each Partner open a separate bank account for the project? (ql, et)</i> No. During the kick-off meeting this issue was raised to partners' attention. As all money transfers flow through the Promoter's account, and are therefore easily traceable, the Networking Committee decided not to ask partners to open separate accounts, which would also have resulted into higher and not justified bank charges. 	Negative

<i>Activities/aspects kept under control</i>	
2. Income	
<i>Tools</i> <ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Did co-financing Partners comply with the deadlines for payments? (ql, et)</i> Partners are compliant with payments, officially registered in the periodical financial statements and traceable at the promoter's. 	Positive
<ul style="list-style-type: none"> <i>Percentage of actual co-financing vs. expected co-financing (qt, ec)</i> Actual income is in line with the expected one: private co-financing is the 35,50% of the total. 	Green
<ul style="list-style-type: none"> <i>Are payments from the EC regular? (ql, et)</i> Yes, that is, the promoter received second pre-financing after the approval of the progress report. 	Positive
<ul style="list-style-type: none"> <i>Percentage of actual EC financing vs. expected EC financing (qt, ec)</i> 100%. The promoterwe received the second pre-financing, totalling 70% of total expected financing. 	Positive

<i>Activities/aspects kept under control</i>	
3. Expenditure	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Are payments to Partners regular? (ql, et)</i> Yes. Payments occur as soon as Partners claim the Promoter, sending financial statements provided for the reporting to the EACEA, in accordance with the agreements between the promoter and each partner, and provided that partners have fulfilled their tasks and delivered expected products. Otherwise the payment is delayed until all duties are complied with. 	Positive
<ul style="list-style-type: none"> <i>Percentage of actual payments vs. expected payments (qt, ec)</i> 100% of what claimed by Partners. 	Positive
<ul style="list-style-type: none"> <i>Are statements of accounts regular and timely? (qt, ec)</i> Yes, in this period. 	Positive
<ul style="list-style-type: none"> <i>Is there any non-eligible expenditure? (ql, et)</i> Not in our opinion. 	Positive
<ul style="list-style-type: none"> <i>Percentage of non-eligible expenditure vs. eligible expenditure (qt, ec)</i> 0% by now. A precise account of this indicator will be possible only after a feedback from the EACEA. 	Positive
<ul style="list-style-type: none"> <i>Were expenditure limits (travel, accommodation, etc.) stated in the grant agreement exceeded? (ql, ec)</i> No. Expenditure are kept under control: no limits were exceeded as far as budget headings are concerned. Nevertheless, few modifications will be needed regarding some partners' budget headings, that will not in anyway affect the overall financial balance. 	Pending

<i>Activities/aspects kept under control</i>	
4. Budget	
<i>Tools</i>	
<ul style="list-style-type: none"> Internal audits Checks are made on a regular basis Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	<i>Rating</i>
<ul style="list-style-type: none"> <i>Is the project being carried out under budget? (ql, ec)</i> Yes. 	Positive
<ul style="list-style-type: none"> <i>Is it necessary to modify the budget? (ql, ec)</i> No. 	Positive
<ul style="list-style-type: none"> <i>How much, and under which budget headings? (qt, ec)</i> Not applicable. 	N/A

<i>Activities/aspects kept under control</i>	
5. Accounting system	
<i>Tools</i>	
<ul style="list-style-type: none"> • Internal audits Checks are made on a regular basis • Promoter's accounting system The promoter's internal accounting system keeps trace of all financial operations relating to the project. 	
<i>INDICATORS : ql=qualitative, qt=quantitative, et=effectiveness, ec=efficiency; TR=transnationality; GE=gender dimension; CO=complementarity</i>	
	<i>Rating</i>
<ul style="list-style-type: none"> • <i>Are the financial rules set in the Grant agreement all complied with? (ql, ec)</i> Yes in our opinion. 	Positive
<ul style="list-style-type: none"> • <i>Does the promoter have a computerised, working accounting system? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>Are all debits and credits identifiable? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>Are there supporting documents for every income/expenditure incurred during the project? (ql, et)</i> Yes. 	Positive
<ul style="list-style-type: none"> • <i>Are they easily and quickly traceable and available? (ql, et)</i> Yes. The project is identified by a precise internal, electronic code for the promoter, a burden centre which makes all headings and documents easily traceable and available. 	Positive

B.3. Comments

By now, WP2 is near to completion, WP3 is ongoing and WP4 right started. Phase 1,5,6 and 7 are running. All forecasted activities are on their way, and carried out under budget.

As stated in several points in this report, the partnership is now catching up with delays that were accumulated in previous period.

It is worth to give some specific remarks on the activities carried out so far:

Process 1: Project implementation

- The achievements so far do not claim to provide a general and exhaustive overview or to draw conclusions on teachers or trainers needs *tout-court*:
 - Interviews were carried out with a limited number of people.
 - Outcomes depend very much on the country and culture of interviewees.Nevertheless, despite the different nationalities, roles and positions of people involved, some important common outcomes are arising from the survey, which might be useful for inspiring, developing and piloting approaches, methods and tools concerning the EUTA.
- Projects outcomes (tools, methods, products) are being designed and adopted taking into consideration the dimensions of “transnationality” and “complementarity”, in order to allow a fair level of comparability, transferability and sustainability. All transnational partners, despite the differences reported above, have developed and used the same tools and methodology for carrying out the survey. This approach has allowed the project to reach comparable findings, a common language (for the analysis of outcomes, the adoption of a transferable method, etc.), and a shared “platform” to propose truly transnational solutions.

Process 2-3: Project and Financial Management

As far as the management of the project is concerned, no major issues emerged in this period, and difficulties experienced in the beginning seem now left behind. The management structures are proving solid, and communication among partners is positive and effective. Each partner is involved to the required extent, and well aware of its role in the project.