



**First Monitoring Report**  
WP7 Internal Monitoring and Evaluation

## **INDEX**

<b>1. Introduction.....</b>	<b>3</b>
<b>2. The advancement of the “technical” Work Package.....</b>	<b>3</b>
2.1 <i>WP2 Preparatory actions for the transfer</i>	
2.2 <i>WP3 Training workshops on the digital portfolio methodology – first transfer</i>	
2.3 <i>WP4 Definition of standards of competences acquired in formal and informal learning settings</i>	
<b>3. The advancement of the Transversal Actions.....</b>	<b>7</b>
3.1 <i>WP1 Management and Coordination</i>	
3.2 <i>WP7 Internal monitoring and evaluation</i>	
3.3 <i>WP8 Dissemination and valorization.</i>	
<b>4. Conclusions.....</b>	<b>11</b>

## **1. INTRODUCTION**

**I CARE - Informal Competences Assessment and Recognition for Employment**, co-funded in the Lifelong Learning – Leonardo da Vinci Programme, is a Multilateral Project of Transfer of Innovation (ToI) aiming at promoting procedures for the recognition and certification of competences acquired in non-formal and informal learning settings and for the transparency of qualifications, within common framework such as EQF and ECVET and with specific reference to the “white jobs”.

The project, promoted by TECLA Association for Transregional, Local and European cooperation, involves scientific organizations coming from Italy, United Kingdom and the Netherlands, respectively Sapienza University of Rome, Institute of Education of the University of London and Cofora BV, as well as partner territories in Italy and Romania, that is the Italian Provinces of Brescia, Campobasso and Pisa and the Romanian Employment Agency of the County of Bistrita-Nasaud.

The present report, part of the Work Package 7 “Internal Monitoring and Evaluation” as the **First Monitoring Report**, describes the advancement of the project I CARE in its first year from 1<sup>st</sup> of October 2010 to the 30<sup>th</sup> of September 2011, analyzing the activities developed and the results achieved as well as delivering some recommendations to improve the implementation of the project in its second year.

In the report, the activities and results of the “technical” work packages, both concluded like *WP2 Preparatory actions for the transfer* and *WP3 Training workshops on the digital portfolio methodology – first transfer*, and underway, like *WP4 Definition of standards of competences acquired in formal and informal learning settings*, are described.

After that, the transversal actions of the project are analyzed: *WP1 Management and Coordination*, *WP7 Internal monitoring and evaluation* and *WP8 Dissemination and valorization*.

Finally, some considerations on the advancement of the project and suggestions on possible improvements are provided at the end of the Report.

## **2. THE ADVANCEMENT OF THE TECHNICAL WORK PACKAGES**

### ***2.1 WP2 Preparatory action for transfer***

During the first three months of I CARE (October 2010 – December 2010) a series of meetings were held between partners and with external stakeholders, in order to initiate the process of the transfer of the digital portfolio methodology and to involve the direct and indirect beneficiaries of the project.

As planned, the first step was the meeting of the Steering Committee, the multilevel *governance* project body governing the process of evaluation and certification of informal competences, made up of Italian project partners and external participants interested in the project issues, such as member Regions, Social Bodies and professional associations.

The Committee met in Rome on 22<sup>nd</sup> November 2010. At this first meeting the project partners agreed to involve only Regions, in consideration of the priority to identify, in order to continue with

project activities, the “white” job/s the project should be focused on. However, only the representative from the Molise Region participated in the meeting.

During the meeting, after a brief presentation of the project and of the structure and objectives of the Steering Committee, the Provinces and Molise Region illustrated the experiences that took place in their territories and regional system for the project themes, providing the first impressions regarding the methodology of the digital portfolio and agreeing on the “caregiver” as the white job for the I CARE project.

The first partnership meeting and the first meeting of the Technical and Scientific Committee were also held in Rome, on 1<sup>st</sup> and 2<sup>nd</sup> of December 2010, with all project partners present. During the partnership meeting, the I CARE project and the project activities to be carried out, as well as the administrative/financial issues, were presented and discussed; the partners also planned the first actions to be carried out. At the CTS meeting, attention was focused on the methodologies, characteristics etc. of the Romanian and Italian systems in the three Provinces (the participants had already been given information about evaluation and certification methods in UK and the Netherlands during the first National Information Seminar, see below).

On the 2<sup>nd</sup> December 2010, the first National Information Seminar was organised in Rome. 42 participants were present from Ministries (Ministry of Labour, MIUR), local authorities (Regions, Provinces, Municipalities), training organisations and research institutes (Universities, ISFOL). The I CARE project and the digital portfolio methodology were presented, as well as good practices developed in the English and Dutch contexts with regard to evaluation and certification of non-formal and informal competences.

### **Actions developed and achieved results/outcomes**

ACTIVITIES	RESULTS/OUTCOMES
Development of the first meeting of the Steering Committee, Rome 22nd of November 2010	Report of the meeting Forms describing the context in each Province (white jobs labour market, procedures and methodologies for the recognition and certification of competences, etc.)
Development of the first partnership meeting, Rome 1 <sup>st</sup> of December 2010	Report of the meeting .ppt presentations Manual on administrative/financial issues
Development of the first meeting of the STC, Rome 1 <sup>st</sup> of December 2010	Report of the meeting
Development of the first National Information Seminar, Rome 2 <sup>nd</sup> of December 2010	Report of the meeting .ppt presentations

## **2.2 WP3 Training workshops on the digital portfolio methodology – first transfer**

As planned, from January 2011 onwards, the transfer of the digital portfolio methodology to the I CARE target group, i.e. the Employment Centres of the three partner Provinces and the Employment Agency of the Romanian County of Bistrita-Nasaud, took place.

The first training workshop was carried out in Rome on 18<sup>th</sup> and 19<sup>th</sup> of January 2011 at Sapienza University. 4 TECLA and Sapienza University project staff/trainers, a representative from the Province of Brescia and 11 workers from the Employment Centres (3 from Brescia, coming from 2 centres, 4 from Pisa, coming from 3 centres, 4 from Campobasso, coming from 2 centres) took part in the training.

The second training workshop was carried out in Bistrita at the Employment Agency on the 15<sup>th</sup> and 16<sup>th</sup> March 2011. 3 TECLA and Sapienza project staff/trainers and 9 staff, coming from the County Employment Agency and 2 local Employment Agencies, took part in the training.

After a brief presentation of the I CARE project and the specific actions directly involving the employment centres, the training program provided for a detailed description of the digital portfolio methodology (methodology, analysis of portfolios from past projects, description of web platform to build electronic portfolios), a collection of in-depth information regarding Italian and Romanian contexts and a reflection on how to integrate such methodology with procedures and methodologies being used in those contexts, as well as a discussion on the documentation necessary to carry out the WP4 desk research (see below).

Furthermore, in both sessions, group activities were carried out, simulating interviews with users in order to develop a digital portfolio (presentation of the methodology to the user, discussion on the evidences to be produced, etc.).

After the workshops, the employment centres' staff in Italy and Romania started to develop the digital portfolios with the caregivers. In the Italian centres, these were identified among the centres' users, while in Romania they came from the formally called "personal assistants" who work specifically with people with severe disabilities (and who are identified by the Municipalities where they reside).

In order to support the staff in building up portfolios, 2 email addresses were set up to provide technical assistance, one for questions regarding methodology and the other for technical questions regarding the on-line platform.

Furthermore, at a halfway point on the 10<sup>th</sup> of May 2011, a meeting was held in Rome with the Italian trained employment centres' staff, with the purpose of analysing the progress in the development of the portfolios and providing suggestions, if necessary, to improve the implementation and overcome any difficulties. 4 TECLA and Sapienza University project staff/trainers, 7 employment centres workers who had already undergone the training and 2 provincial representatives, took part in the meeting. The meeting also provided an occasion to have a face to face discussion with the workers regarding the standards of competences of the caregivers (see WP4).

WP3 came to a close in July 2011 with a mainly physiological delay of 1 month over the original plans. In Romania this happened because it was not possible, due to previous commitments of the Romanian partner, TECLA and Sapienza, to carry out the workshop at the beginning of 2011, as well as because of the time necessary to search for and "recruit" the "personal assistants" and to

become familiar with the methodology and instruments to use the digital portfolio, particularly innovative for the Romanian context.

In Italy the development of the portfolios coincided with numerous commitments for the employment centres during a period of economic crisis (redundancy payments, etc.) and the staff of the centres had to wait for various permits from the Provincial Administration for the use of the software for the platform.

By the end of July 2011, 14 portfolios were developed in Italy (2 in the Provinces of Campobasso, 5 in Pisa and 7 in Brescia) with Italian and foreign caregivers and 4 portfolios in Romania with personal assistants, a greater total number than the 10 portfolios foreseen at the time of planning.

At the same time, the methodological Manual and the technical Guidelines (the latter in a condensed version, due to the possible modifications to the online platform on the basis of feedback from the staff of the employment centres) were translated into Romanian. The online platform that supports the portfolios was also offered in the Romanian language version (see WP8).

### **Actions developed and achieved results/outcomes**

ACTIVITIES	RESULTS/OUTCOMES
Development of training workshops in Italy and Romania for the transfer of the digital portfolio methodology	Training workshop in Italy – 18/19 January 2011 Training workshop in Romania – 15/16 March 2011 Reports of the training workshops Training material (.ppt presentations, grid for group activities, etc.)
Development of digital portfolios with caregivers/personal assistants	Database with 18 digital portfolios 2 email addresses for technical/methodological support Meeting with Italian Employment Centres – 10 May 2011
Translation of the Manual, Guidelines and online Platform into Romanian	Manual, Guidelines and on line platform in Romanian language

### ***2.3 WP4 Definition of standards of competences acquired in formal and informal learning settings***

In February 2011, the partners started sending TECLA and Sapienza University (coordinator of WP4) various national, regional and provincial documentation regarding the recognition, evaluation and certification of competences with special reference to informal /non formal competences and the professional figure of caregiver/personal assistants. In parallel, Sapienza started the secondary analysis of documents (community and national level, case studies).

In the meeting with TECLA, Sapienza University and Italian employment centres on the 10<sup>th</sup> of May 2011 (see WP3), WP4 and the activities to be carried out were presented in detail. A first comparison between the standards of competences of the caregivers in the 3 Regions involved in I CARE and in an Italian case study (“Talenti di Cura” project, LLP Leonardo da Vinci TOI LLP-LDV/TOI/2007/IT/011) was discussed, as well as the structure and number of interviews to carry

out with institutions, families who employ a family assistant and employers working in the sector (cooperatives, private employment agencies, etc.).

Almost all the interviews planned in Italy in the three partner Provinces were carried out between June and September 2011 by project coordinators and staff of the employment centres, as well as in Rome by TECLA and Sapienza University (to have a comparison also with a national level and a fourth geographic context): 9 with institutions (Regions, Municipalities, training schools, etc.), 7 with employers (nursing homes, cooperatives, etc.) and 11 with families.

Sapienza University has started drawing up the Research Report, containing two reports on the Italian and Romanian contexts (desk study, field study, case study and bibliography), two good practices reports on the British and Dutch situations, as well as the comparison report (containing recommendations) and the standards of references of the caregiver.

The partners, on the occasion of the second partnership meeting (26<sup>th</sup> September 2011, see WP1) started the discussion on the WP5 “Identification and validation of the Model for the evaluation and certification of informal and non formal competences” with the purpose of avoiding any delays and thus developing these actions parallel to WP4.

### **Actions developed and achieved results/outcomes**

ACTIVITIES	RESULTS/OUTCOMES
Development of a desk research	Documents provided by partner on white jobs, caregiver/personal assistant, systems and methodologies for the recognition and certification of non formal and informal competences, etc.
Development of face to face interviews	3 interviews guides and 27 interviews carried out
Definition of standards of competences of the caregiver	Grids and documents for the comparison between the standards of competences in the 3 Italian Region and in 1 Italian case study and for the identification of the I CARE standards of competences
Development of a research report	Index of the research and 4 national reports

## **3. THE ADVANCEMENT OF THE TRANSVERSAL ACTIONS**

### ***3.1 WP1 Management and Coordination***

Within the WP1, which aims at ensuring an effective and efficient coordination of the I CARE project and the partnership, all actions planned for the first year of the project were carried out, ensuring good management of the activities and of the flow of internal and external information.

There were two critical points during this period, which resulted in 2 request for amendments to the National LLP LdV Agency and their subsequent approval.

The first was a change in the bank account, modifications to the project's approved budget and changes in the partner budget quotas.

The second amendment was due to the substitution of the Dutch partner Foundation Empowerment Centre EVC with the Dutch partner Cofora BV due to bankruptcy of the former. The substitution did not cause problems for the project as Cofora took on an identical role with the very same responsibilities and budget previously assigned to the Foundation. However the time required for the presentation and approval of this request caused a delay in some secondary activities (such as the printing of brochure) during the months of April and May 2011.

Another problem specifically relevant to coordination was due to the inexperience of the Romanian partner with regard to projects financed by the European Commission. This was overcome thanks to the huge effort put in by the Romanian partner itself as well as greater technical assistance from TECLA.

The second partnership meeting took place in Bistrita on 27<sup>th</sup> September 2011 with all partners present. The progress of the project, with particular reference to WP4, was discussed at this meeting, while the actions required to conclude WP4 and develop WP5 were planned.

### **Actions developed and achieved results/outcomes**

ACTIVITIES	RESULTS/OUTCOMES
Establishment and functioning of the Steering Committee	1 meeting of the Steering Committee– 22 November 2010 (see WP2)
Establishment and functioning of the Scientific and Technical Committee (STC)	1 meeting of the STC– 2 December 2010 (see WP2)
Partnership meetings	2 partnership meetings – 2 December 2010 (see WP2) and 27 September 2011
Development and sharing of documents regarding coordination and management	<ul style="list-style-type: none"> <li>• Time plan/GANNT of the project</li> <li>• Manual/Guidelines for financial reporting and .ppt presentations on the project</li> <li>• Documents for 6 monthly activity/financial internal reporting and 1 internal activity/financial internal reporting (March 2011)</li> <li>• Bilateral agreements signed between TECLA as project leader and each partner</li> </ul>
Management of the internal and external communication flow, including the relations with the National Agency LLP Leonardo da Vinci	Email/Phone communication 1 cahier de bord for the National Agency (march 2011) 2 emendments to the project
Development of the project website	Website <a href="http://www.projecticare.eu">www.projecticare.eu</a> , including the on line platform <a href="http://www.icareplatform.eu">www.icareplatform.eu</a> containing the database of digital portfolios

### **3.2 WP7 Internal monitoring and evaluation of the project**

The objective of WP7 is to ensure quality, coherence and effectiveness of the project activities through constant monitoring of the actions being taken.

To this end, in October 2010 TECLA, as partner responsible for this aspect, drafted a **Monitoring and Evaluation Plan** that defined the strategy and objectives of monitoring and evaluation as well as the tools to be used for data collection and analysis (satisfaction questionnaires, etc.)

In the following months, the partners provided all necessary information regarding activities carried out and the resulting products/effects; this information was therefore included while processing this document, namely the First monitoring report.

With regard to the evaluation, in view of the final evaluation Report, questionnaires for ex ante and ex post evaluation of the competences of the staff of the Employment centres involved in the project in Italy and Romania have been filled out.

The ex ante evaluation questionnaire was given before the training workshop (WP3), in order to test the competences of the staff before taking the course. The factors taken into consideration were: IT competences, knowledge of the principal European definitions on formal, non-formal and informal learning, technical competences regarding the application of methods for the analysis of competences and expectations on the training workshops.

The ex post questionnaire was given after the training workshops (WP3), containing the same questions as before, in order to check any differences in competences of the staff before and after the workshop. Currently, work is being carried out to process the data from the questionnaires so as to evaluate the impact of the training in terms of growth of knowledge, abilities and competences of the staff of the employment centres.

With regard to the evaluation of the management, the partners were asked through on-line questionnaires to express an opinion on the quality of project coordination. The variables chosen for evaluation were: work plan, coordination, partnership and communication. The data gathering phase has just come to an end. This will be followed by an analysis of the responses and their processing in order to identify strengths and weaknesses and thus continue to improve the project.

#### **Actions developed and achieved results/outcomes**

ACTIVITIES	RESULTS/OUTCOMES
Drafting and sharing of a Monitoring and Evaluation Plan	Monitoring and Evaluation Plan
Collection of data and information on the project WPs and partners	Satisfaction questionnaires on the training workshops Ex ante and ex post evaluation questionnaires of the competences of the staff of the Employment centres Evaluation questionnaires on management Quantitative information on project activities and products (6 monthly activity/financial reporting)
Drafting of the first monitoring report	First monitoring report

### **3.3 WP8 Disseminazione e valorizzazione**

The objective of WP8 is to ensure the visibility of the I CARE project, by sharing and disseminating information about its activities, products and results, as well as promoting and strengthening the involvement of all actors interested in the project issues. All partners have been involved in this phase, according to the different responsibilities determined at the time of planning.

One of the first outcomes of this phase was the external communication Plan of the project, drafted by TECLA, and the logo/graphic design of the project, carried out by the Province of Brescia which was then selected by the entire partnership in its final version.

The website, created by TECLA, has been online since December 2011. It contains the on-line platform with the database of digital portfolios, which is directly accessible by the trained staff of the employment centres using a username and password. The multilingual brochure, with graphic design by the Province of Brescia and printed by TECLA, was printed in 2 versions due to the replacement of the Dutch partner (see WP1), and two issues of the newsletter were published in March and September 2011. Two National Information Seminars were held, the first in Rome on 02<sup>nd</sup> December 2011 (see WP2) and the second in Bistrita on 28<sup>th</sup> September 2011, with about 35 participants, mostly employees of local and regional Employment Centres.

All the partners promoted information sharing on the I CARE project in their territories through press releases and press conferences, websites, etc.

#### **Actions developed and achieved results/outcomes**

ACTIVITIES	RESULTS/OUTCOMES
Formulation and sharing of the communication strategy	External communication plan
Drafting of the proposals for the project logo/graphic design and selections by majority of the final version	Project logo and graphic design
Development of the project website	Website <a href="http://www.projecticare.eu">www.projecticare.eu</a> , including the on line platform <a href="http://www.icareplatform.eu">www.icareplatform.eu</a> containing the database of digital portfolios
Drafting and printing of the brochure	Brochure of the project in Italian, English and Romanian distributed in partner territories
Drafting of the project newsletter	2 issues of the newsletter in both Italian and English
Development of National Information Seminars	1 National Information Seminari in Italy – Rome, 2 December 2011 1 National Information Seminari in Romania – Bistrita, 28 September 2011 .ppt presentations
Dissemination of information and news on the project	Press conferences/releases in partner territories, news on partners' website and in events, etc.

#### **4. CONCLUSIONS**

In general, the monitoring carried out during the first year of the I CARE project shows a good correspondence between the objectives and the work plan fixed in the planning phase with what was actually achieved and implemented.

However, delays have been noted, as illustrated, in carrying out the activities of WP3 and WP4, thus the conclusion of the latter WP is now expected in November 2011. These delays do not however seem to invalidate the overall development of the project, thanks also to the launch of WP5 in October 2011 as planned.

Naturally it is however necessary, in order to obtain greater efficiency for the planned measures, to consider areas where improvement is possible.

In the first place, considering the actions to be developed in the second year, it is crucial to involve the Regions that the partner Provinces belong to and which have in any case been informed of the project (for example through WP4 interviews), but have not taken on the role planned in the Steering Committee. The second meeting of the Steering Committee must therefore call for effective involvement of the Regions to validate the standards of competences of caregivers drawn up by the I CARE project.

In the same way, effective methods to involve other actors of the Steering Committee (social partners, etc.) must be drawn up, even if these actors had in any case been partially reached on the occasion of the First National Information Seminar in Italy.

These actions will be crucial for the success of the second year of I CARE, which is without a doubt the most challenging and ambitious phase of the project.