

The 1st Transnational Partnership Meeting of the DAISS Project

Burleigh Court Conference Centre and Hotel, Loughborough, UK

13th-15th December 2011

Minutes of the Project Initiation Meeting

Tuesday 13th December 2011 (minutes by Claire Shore)

Present – Hilary Hale, Val Sanders, Claire Shore, Jackie Rawling, Colin Stoker, Daniele Garulla, Paulo Tubino, Monica Balaj, Simona Litviniene, Anna Vasileiadi, João Rodrigues, Thomas Vondrak, Assenka Hristova, Gheorghe Sandulescu, Mariana Bistran.

First Work Session: Introductions to each other

The meeting began with the partners providing a short introduction to the rest of group of their organisations:

1. **FOR SAS, Italy.** Daniele Garulla and Paulo Tubino
 - a. Training service for Enterprises
 - b. Finding funds and resources for the training
 - c. Business Consulting
2. **ASEV Empoli, Italy.** Monica Balaj
 - a. Agency for Development
 - b. Planning and managing training courses & information, advice & guidance
 - c. Employability
3. **Social Innovations Centre (SIC), Lithuania.** Simona Litviniene
 - a. Non-formal education and training
 - b. Work with social groups
4. **HRDC, Greece.** Anna Vasileiadi
 - a. Promoting innovation, training and development
5. **Sociedade Portuguesa de Inovação (SPI), Portugal.** João Rodrigues
 - a. Management of projects
 - b. Consulting/training/research and development
6. **VondiConsulting, Austria.** Thomas Vondrak
 - a. Previous experience of working on TOI
 - b. Support for start-up business
 - c. Business Consulting/Event Management
7. **Industry Watchdog Group (IWG), Bulgaria.** Assenka Hristova
 - a. Economic analysis & social studies
 - b. Business consultancy
8. **IPA SA, Romania.** Gheorghe Sandulescu and Mariana Bistran
 - a. Training for national and international projects
 - b. Working with those with disabilities, ethnic minorities etc

Hilary then spoke about **Apricot**, the project co-ordinators. We are an independent not-for-profit company that assists companies, organisations and individuals to grow through **Learning, Training and Development** – which is at the core of everything we do.

All partners agreed to email Hilary or Val with their presentations for inclusion in the minutes of the meeting.

Second Work Session: Exploration of the Work Packages and Partner Roles

The group then looked at the programme for the next few days; Hilary asked if the partners felt there was anything missing that we should talk about. Everyone confirmed that it looked ok and that they would mention any amendments as we were going along.

The next step was to look through the individual work packages, what they involved and which partners would be involved/take the lead with them:

- Work Package 1 - **Project and Partnership Management**. **Apricot** will retain control of this as Project co-ordinators.
- Work Package 2 - **Product Adaptation**. The next stage is to translate, prepare and adapt the tool to match language and cultures of the different countries. In terms of identifying the needs of employers, it was felt that SPI, IWG and FOR SAS would be best to deal with this because of their past experience of working with companies. On the other hand, SIC and IPA SA would look at the needs of the individuals, due to their extensive work with them in the past.
- Work Package 3 - **Employer Engagement**. HRDC will take the lead in this.
- Work Package 4 - **Product Piloting**. ASEV will be responsible for the overseeing of the piloting of the translated Soft-Skills assessment. The aim is to pilot the project with the diagnostic translated and culture supported. Numbers involved:
 - 400 individuals (therefore 50 per country)
 - Train at least 30 VET trainers per country to use and interpret the test
 - Attract and engage 80 employers to use the Job Matching Tool.
- Work Package 5 - **Quality Assurance**. As project managers, **Apricot** will be responsible for this section of work.
- Work Package 6 – **Evaluation**. SIC will take the lead from this and will be responsible for appointing an external evaluator. This will be used to achieve continuous improvement of the tool.
- **Valorisation:**
 - Work Package 7 – **Dissemination**. Vondi.
 - Work Package 8 – **Exploitation**. IPA SA.

One of the goals here is to provide partners with a business plan of the future of the tool across Europe.

The differences between transfer, dissemination and exploitation were discussed. This led onto a conversation regarding the commercial opportunity of this TOI. If the translation of the tool is successful in terms of both language and cultures, there is the possibility of a commercial offer and the partners could be European agents for the product. However, Hilary reinforced the fact that it is not just a case of transferring the language through translation, but also workplace behaviour. Further discussion led to a conversation as to how the 'agents' would be paid. Hilary confirmed that we don't have any answers regarding this just yet and this is what the exploitation part of the project will look at.

The group then discussed the project's aims and objectives and Hilary asked everyone to get into smaller groups and make some notes about what are your organisations' hopes and aspirations for the project. After 10 mins, everyone came back together and gave feedback, which very much confirmed that the partners have a shared vision for the project.

Hilary briefly spoke about the Steering Group and requested a list of people who will be in the Group and who will be attending these transnational meetings. Everyone confirmed they would go back to their organisations and look at whether they would be the contact assigned to the project.

Third and Fourth Work Sessions: A demonstration of the Self-Awareness Soft Skills Diagnostic Tool

The afternoon was conducted by Jackie Rawling and Colin Stoker, who discussed the ideas behind the development of the self-awareness diagnostic, how it worked, its current markets and the type of outputs it delivered.

All delegates then completed their own online diagnostic assessment and the outputs were discussed.

Wednesday 14th December (minutes by David Nelson)

Fifth Work Session: Understanding the Employer and 'Job Matching' Element of the Diagnostic

This session was led by Hilary Hale and Lucy Shenton. Apricot's job matching tool (which is a key element of the TOI) helps employers articulate the soft skills required for a particular role/job and then to match possible interviewees to this profile on a candidate batch basis. It is often said that "it is an individual's hard skills that get the interview and their soft skills that get the job. This element of the diagnostic was demonstrated to members who appeared enthusiastic:

- Monica recognised the value to young people who lacked work experience
- Anna could see the potential benefit to public agencies and employers
- Georges felt it was a good development and would minimise the chance of people misrepresenting their attributes. In Romania businesses have a tradition of employing people for a trial period but this is costly for both the individual and the company.
- Daniele was a little concerned about the reaction of employers since in Italy employers are fixated on hard skills
- It was felt that it would be easier to engage with larger employers but that SMEs may need persuasion. This was felt to be particularly the case in Bulgaria where employers normally recruit on recommendations. Here SMEs were felt to be a harder target.
- All members felt that there would be a need to build the confidence of employers in its use.

It was explained that the job matching tool was an asset in both slack labour markets (where it could help the unemployed to show their wider attributes) as well as in tight labour markets where it could help employers make more refined choices.

There was some concern over the scale of the challenge of translating the materials. There was enthusiasm however for the basic simplicity of the tool, it's easy of use and the limited time it took to complete. Its flexibility was also an asset being on line or capable of being used in paper form.

There was some discussion about the possibility of increasing its credibility through developing a 'kite mark' approach to use with employers.

Members were given examples of the enterprise reports that could be generated from the diagnostic. It was recognised that these were simply additional to the many other reports that the tool could generate.

Sixth Work Session: Preparation, Adaptation, Testing and Exploitation

Initial discussions on Communication, External Evaluation and Project Branding were brought forward on the Agenda as some partners had to leave the meeting early.

1. Communication between Partners

There was general agreement about the importance of clear and consistent communication and of the value of agreeing common protocols at the beginning of the project.

It was recognised as important for members to confirm who would be representing the different partners on the **Steering Group** and who would be coming to the transnational meetings.

A briefing note on communications for the project was distributed to members and agreed (also on the data stick).

It was also agreed that an **e-mail distribution list** would be drawn up and circulated once people on the project team have been confirmed.

It was agreed that '**dropbox**' represented a good medium for sharing large file between partners. An alternative might be PBWORKS.COM.

Members were asked to provide Hilary with their Skype addresses.

After discussion it was agreed that the project would operate on MS Office 2007.

The general view of members was that whilst it might not be strictly necessary to use a dedicated project website and there might be less costly alternatives available. **However, it was agreed that a dedicated website was preferable if it could be afforded.** Hilary agreed to look at this in light of the budget. **The importance of a 'shared space' was agreed.**

2. External evaluation

This was an area in which Simona's organisation would be assisting in the appointment of an external evaluator.

3. Project Branding

It was felt that there were benefits in keeping the branding simple. **It was unanimously agreed to use the Self-Awareness brand with the DAISS project label attached.**

It was agreed that Thomas would look at this in relation to development of the website.

Partners were asked to provide Thomas with suitable copies of their logos also for use on the website.

4. Adaptation and Testing

Val gave an outline of the phasing of the project and members were provided with a written briefing note on this aspect of the project.

Phase 1 – This phase of the project is effectively complete. It was agreed that everyone now had an understanding of the main aspects of the project as well as a chance to experience the diagnostic tool themselves. A **handbook** will shortly be completed by Apricot (by 22nd January) and issued to members to augment their understanding and to assist in implementation.

Phase 2 (The Needs Analysis) – An important aspect of the project is the understanding of the culture in the different countries concerned. Val said it was important for members to provide an understanding of the key characteristics of their labour markets and the different culture and issues particularly with regard to recruitment. Simple points will be sufficient. There is no need for extensive studies. Some primary and secondary research will be sufficient.

Each partner needs to provide a report, the details of which were to be provided later in the day. Anna will be assisting in providing a template

Phase 3 (Adaptation, Translation and Localisation) – This was recognised to be the core of the project. The importance and potential difficulties of accurate translation was agreed. Anna believes that this will be achievable. The scale of the task was discussed. At a minimum the project will require the following:

- The footprint (including hovers) was circa 200 words
- The individual ‘candidate feedback’ report and working styles was circa 25,000 words
- The ‘employer’ report was also circa 25,000 words

Phase 4 (Exploitation - Target Groups etc.) – **Georges and Mariana are to lead on exploitation and will produce a template for each partners Exploitation Plan.** It was seen as important for consideration to be given to exploitation at an early stage.

Georges was keen to state that **valorisation depends on everyone.** It was felt that we need agencies involved in recruitment to ‘buy in’ to the project. Georges will send **a list of the parties to be contacted.** It was agreed that if we do not work coherently and connect with the right organisations then the value of the project will be more limited.

Georges emphasised the importance of having a compelling demonstration, a clear presentation, pricing policy, and terms and conditions. It was such details which helped ‘sell’ the diagnostic to potential users and would allow them to appreciate the likely value of the project. Apricot’s experiences in the UK with real clients would be valuable in this respect.

Seventh Work Session: Planning Work Package Delivery for the First 6 months

The Project Plan, including activities, tasks, milestones and evidence, was explained. It was important for all members to understand where they were leading an activity and/or contributing to it. The onus is on each partner to ensure that a plan and process is in place for completion. It was also the responsibility of everyone to contribute to all strands of the project.

Individual partners were provided with a handout identifying each organisation's responsibilities and showing individual tasks. Partners were made aware of the '**set in stone**' milestones in the project. It was recognised that the set up phase of the project was the most onerous and that the second quarter of the project was particularly heavy on activities.

Members appeared to welcome the detailed planning which had gone into the project and the clarity which it provided.

Issues Arising:

- Thomas felt that he might need a further month to be added to the completion time for his work packages. It was agreed that partners might already have templates for dissemination which might be appropriate with some adaptation and that this might save some time. It was felt that SPI might have something that was helpful.
- **Visibility for the project** was seen to be important. E.g. links to partners websites
- **Launch activity** was to be completed in each country **by 31st March 2012** – partners were to be free to decide on the nature of this activity but would need to provide a report and evidence of how they had promoted the project.
- Daniele wanted to push back his deadlines to beyond the end of January

Conclusions

Members were pleased with the level of planning that had gone into the project. They were impressed with the potential of the diagnostic tool and felt that the level of organisation which had gone into the early phase of the project promised well for its ultimate success.

Thursday 15th December.

Eighth Work Session: Project Administration and Management

The first 3 elements on the agenda had already been covered. Issues remaining were:

- Monitoring activities, milestones and results
- Financials and claims

In addition it was agreed to cover the dates of future meetings and the target markets for the project.

Thomas also wanted **Apricot to take responsibility for updating the ADAM database** and it was agreed that Hilary would do this for the English version, Val would do the French and Thomas would check the German version.

Prior to the discussion on project administration a more detailed discussion of the target markets and perceived benefits took place.

Target Markets

Hilary explained that Apricot wishes to be flexible and allow partners to choose target markets that they were comfortable with either because they had worked with them before or they were interested in working with them.

Essentially we see 3 different target groups:

1. SMEs – The EU want to benefit small businesses not large employers. The project has a target of 80 SMEs (10 per partner over the 2 years of the project). All partners agreed that they were comfortable with this expectation.
2. VET providers and trainers – In total the project looks to engage with 30 trainers (3 or 4 per country). It was recognised that for some partners the trainers might be from within their own organisations. All partners agree this was a reasonable target to achieve.
3. End users (beneficiaries). In total the project looks to engage 400 beneficiaries (50 per country). Apricot wished partners to choose any target groups they feel appropriate so long as they meet the basic criteria of >19 years old and at a disadvantage in the labour market. Those partners present gave the following choices.
 - Italy – immigrants and the unemployed
 - Portugal – to be decided
 - Austria – the unemployed with emphasis on women and older people
 - Rumania - happy to consider any (unemployed, disabled, job changers)
 - Lithuania – to be decided
 - Greece – to be decided

Partners we asked to provide some rationale to accompany their choice of target group and why they were important in the country concerned. This will be used to support the needs analysis and should cover all 3 strands of engagement i.e. SMEs, VET providers/staff and end users (beneficiaries).

Target Groups for Dissemination and Exploitation

The discussion was to help inform the template for the dissemination which will be prepared by Thomas. Members identified the following potential targets:

General education providers, Pan European Bodies, Trade associations, National agencies, Chambers of Commerce, NGOs, VET policy makers, research bodies, labour 'marketeters', social partners, temp. agencies and employment agencies, job centres other EU project groups, partners own networks and groups.

It was agreed that Thomas would provide a Dissemination Plan Template for all to complete.

Conferences were also seen as a useful way of disseminating results and Georges mentioned two that are held each year in Romania.

It was agreed that a simple project description would help ensure a consistent message. This could then be used on various website also. One that was mentioned was 'enter-network.eu'. It was agreed that Val will revise the project description on the Adam database and ensure it was suitable for 'marketing' the project. i.e. that it 'sells the benefits to the user rather than the project to our funders'.

Perceived benefits

Members tried to identify the potential benefits to users as follows:

1. For SMEs

- Saving costs of recruitment
- Simplify the recruitment process
- No time wasted on 'poor fits'
- More efficient
- A help in clarifying the person specification
- It could help educate employers on the value of soft skills
- Reduced risk of a bad appointment
- Provides 'and excuse to say no!'
- A reduced risk of non-compliance
- Saves time
- More than just hard skills which we know does not work.

2. For VET providers/trainers

- New tool (and one that is tested and works)
- Improves VET curriculum
- May help attract learners (particularly if paying customers)
- Help to understanding employer needs – particularly soft skills
- Helps with Information Advice and Guidance (IAG)
- Can help improve soft skills of learners where existing gaps can be trained
- A means of recognising informal learning

3. Beneficiaries (adults)

- More self aware
- Help them understand how to present themselves for a job

- Could improve individual marketing
- It is quick, easy and can be either face to face or web based
- People are interested in knowing more about themselves
- The 'real self image' is revealed – a critical friend
- It 'reduces the drama' and provides a reality check.

All partners felt that these discussions about target groups and benefits of the project and product were helpful and provided a good common understanding.

Project Management

All partners were provided with a data stick containing the project management spreadsheets etc. Hilary explained that the project management approach was based on the principles of Prince 2.

Steering Group

It was agreed that partners would confirm their representation on the Steering Group by 11 January 2012.

It was also agreed that if there was to be a change then any new individual would be fully briefed so that they could contribute appropriately.

It was agreed that the diagnostic tool could be used by partners on a limited number of colleagues within their organisations to help promote a better understanding. Claire will organise for this to be done.

Monitoring

The project will be subject to Monthly reporting and Quarterly monitoring.

Partners were shown the format of the reports that would be required copies of which were on the data sticks provided. It was recognised that this consistent approach was necessary to capture the data consistently from employers, VET providers and individual beneficiaries.

Hilary explained the level of data that would be required together with the need for a monthly narrative report of activity. **Partners agreed to follow the template provided for Monthly Reports.**

The **Quarterly Monitoring reports** will need to provide the evidence in support of the project's activities and costs. **Partners agreed to follow the template provided.**

Partners welcomed the organisation of this work.

Future Meetings

A schedule of future meetings was handed out. **This was agreed by partners subject to the following change. It was agreed that the meeting in Romania should be moved back by one week and would take place the week of 23rd-27th September 2012.**



Milestones

The milestones in the project are when we must complete the contract deliverables. Hilary showed how individual partners' responsibilities are highlighted on the spreadsheet and how they should be reported. **It was agreed that each quarter progress towards and achievement of milestones should be sent on the Quarterly Monitoring Spreadsheets (in the datastick) to Claire who will collate them.** Partners were happy with this approach.

Hilary took partners through the various documents and spreadsheets on the data stick. So far as evidence of financial expenditure in support of claims is concerned, it was made clear that Apricot will require **copies** of receipts, boarding cards etc. **NOT ORIGINALS**. They can be scanned (preferred) or emailed whilst partners keep originals safely in case of audit!

Meeting Notes

Hilary agree to send a full set of notes of this initial project meeting to all partners together with all the presentations that had been given.

It was also agreed that the budget would be broken down partner by partner and activity by activity so that all partners knew exactly of their budget position. Hilary would attempt to do this before Christmas.