



External evaluation quarterly monitoring report Qtrs 1 and 2

This document represents the external evaluator's quarterly monitoring report for the commencement phase of the Innovative Trainer project as funded under the EU Lifelong Learning Transfer of Innovation Programme. The monitoring report relates to the project periods spanning October – December 2012 and January to March 2013. It relies on the collective feedback to a detailed consultation questionnaire from all partners (see appendices) and the responses of which provide the basis to independently track progress, challenges, outcomes and partnership dynamics throughout the lifetime of the project.

Transnational Meeting 1

Momentum use three sources of information to assess performance in the first six months:-

- partnership progress as ascertained from the meeting minutes and partner correspondence regarding work package progression
- feedback from individual partners on their views of meeting usefulness and meeting management
- evaluator attendance at the first partner meeting in Newry, November 2012.

Project commencement is a critical phase of any Lifelong Learning project. Taking a project concept as articulated in the successful application involving a diverse collective of partner organisations and their staff from plan to reality requires a robust and systematic and goal/task approach to project delivery.

The first Innovative Trainer transnational project meeting was held in Newry, Northern Ireland, UK from November 6th – 7th 2012. Commendably, at the meeting outset a strong emphasis was placed by the lead partner on partner introductions and building familiarisation with each other at organisational and personal levels. This brings the understanding of partnership members beyond their formal application form descriptions into living organisational profiles spanning ambitions and character which cannot be captured on paper. This is a very important component in building shared relationships at a personal level which will be called upon over the course of the project. Crucially partner expectations were explored and discussed ensuring that a shared and realistic outlook was adopted from the outset. The

meeting also provided the opportunity to review the financial basis for the project, payment plan and an administrative update in terms of Partner Agreements.

The lead partner Newry and Mourne Enterprise Agency (NMEA) led a detailed work package and task planning exercise and cross package familiarisation. A highly impressive feature of this project is the Trac Project Management system – this is, in our opinion, is the ultimate project management portal. This system was successfully used by some of the partners in a previous Lifelong Learning Project and was evaluated as best practice tool. Our review of the content and usage of the system show that it has been enthusiastically adopted by all project partners and it is clearly a well used project management tool.

Evaluating the usefulness and performance impact of the first meeting for project partners was explored through the **external evaluation online questionnaire** relating to this vital first quarter and the subsequent quarter. The feedback provides a very interesting internal perspective of the early day's progression of the project including the 1st partner meeting in Northern Ireland and the follow up period thereafter.

In terms of determining and measuring the partner's **main hopes and expectations** for the first Innovative Trainer partner meeting and the extent to which these expectations were met, we are particularly impressed with the partner emphasis on partner familiarisation, building relationships and stimulating a dynamic team approach. This bodes very well for a progressive partnership. The feedback of project partners in terms of the desired outcomes from the first meeting can be summarised as:-

- *Get to know and develop positive working relationship with partners; Consolidate and clarify goal of project and how all partners work together to achieve this - bring the Description of Work to life!*
- *Completed a rigorous overview of work-packages, deliverables and partner roles and gain a high level of consensus from all partners.*
- *Meet and better understand all partners and start using joint team tools to be most effective in our activities.*
- *To ensure that partners would work well through a very busy agenda and agree on a work plan that NMEA had prepared in draft format*
- *To get know and build relationships with the partners.*
- *Establishment of guidelines for the smooth running of the project.*
- *First aim was to know in detail each partner involved in this project. The second aim was to clarify and to review the work packages and the tools for communication within and outside the project.*

- *To build relationships with the partners to gain a full understanding of all the work packages to get a detailed brief of our work package*
- *1) That the project would be explained and summarised given it was almost a year since the submission was made . 2) get to know the project team members 3) Set out clear operational guidelines 4) set clear responsibilities 5) set clear milestones*
- *To clarify the main lines of the project, and have clear the first steps to procede*

All partners without exception reported that all their expectations were met. The glowing commentary from the more experienced EU collaborators is particularly impressive. The following highlights were singled out for emphasis:-

- *NMEA did an excellent job of over-viewing the full project and, even better, provided supporting materials that they prepared beforehand (excel sheets of WPs, all deliverables, key dates, assigned leaders, etc.). - Enough time was allowed to learn not only about assigned responsibilities of each partner, but also their primary skills and strengths in relation to this project. - We started straight-away using tools like PiratePad and Popplet to document work items and, even better, had the availability of an SVN (archival database) to continually store and share our work. - We measured our levels of agreements and reached good consensus on key items (dates, deliverables, etc.)*
- *The work plan and the associated roles and responsibilities were agreed.*
- *Our expectations were met as the meeting was extremely businesslike. The project was reviewed in great detail with the result that all partners understood the deliverables. A methodology for working was agreed. The tools that the partnership would use were also agreed and demonstrated.*
- *Expectations met in full*
- *The Kick-Off meeting was the occasion for each partner to present its own organization. All the work packages were detailed and proper communication tools were established.*
- *All partners were well prepared and the meeting excellently organised.*
- *We reviewed the different work packages and solved the doubts about each work package*

In terms of what partners says as the **most beneficial outcomes/highlights of this 1st partner meeting**, the following feedback was received:-

- *The partnership made a good start to the project, working effectively and efficiently.*
- *Everyone helped to develop a detailed project plan for each work package. The team worked as a real team.*
- *Some partners were known to me from previous projects and the 'new' partners fitted into the group really quickly. The project management team went to great lengths to ensure that the 'new'*

partners were welcomed and made to feel part of the team.

- *For me, the most beneficial outcome was to get to know the other members of the consortium. Presentation of primary competencies of each partner allows achievement of a strong team.*
- *Meeting the partners who showed great enthusiasm*
- *The exchanging of information, especially from a project management point of view, and the high level of consensus were key. The accompanying feeling of high motivation from all involved is quite beneficial, too. A commitment from all to prioritise early results and early, appropriate, dissemination can be cited, too.*
- *Confirmation of allocation of work package responsibility. Gaining a better understanding of what was expected from the project*
- *Understanding of how collaborative working will work i.e. through tools such as Skype*
- *A clear plan of action for the next six months was agreed and achievable goals set for all partners*
- *To meet the partners in person (some of us knew each other). To test the online-tools that we were going to use*

Partners were asked where there **parts of the 1st partner meeting that they didn't feel were worthwhile or productive.** The feedback does not give rise to any concern:-

- *The trip to Belfast although interesting and valuable might better have been handled as a visit from the presenters in Belfast coming to Newry.*
- *Maybe I would liked to have one more day to go more into details*
- *It was all productive and worthwhile*

As we can see there was a very high level of satisfaction with the tone and content of the first meeting. As evaluator's we are impressed that the new partnership has gelled very well from the outset. This bodes very well for the ongoing delivery of the detailed project work plan – perhaps it will be a challenge to maintain this level of satisfaction.

Transnational Meeting 2

Building on the very successful first partner meeting, project launch and initial work package actions, the second Innovative Trainer transnational project meeting was held in Valencia, Spain in March 2013. Firstly, we asked participants if they were satisfied with project progress between the 1st partner meeting in Northern Ireland and the 2nd partner meeting in Spain. There was a unanimous level of satisfaction. To review specific feedback shows the depth of progress achieved in between the meetings:-

- *About 4 months elapsed between these meetings and we seem to be right on-target for the WPs that need to be focused on in this period. WP2 got off to a solid start and partners had been reviewing the materials from the previous project (IIME) to better understand improvements needed.*
- *All work packages have been kept to schedule with individual partners contributing on time and to a high standard*
- *The project is mainly on target, where there was some delays they have been highlighted and discussed, so that any concerns were addressed.*
- *There were regular meetings on Skype between partners. This allowed a smooth and correct progression of project activities.*
- *All partners worked hard and very well together to ensure that we had reached the stage we should have by the time of the second meeting*
- *The methodology and tools agreed at the meeting were followed through - SKYPE calls, SVN, Pirate pad etc.. Each partner embraced the methodology.*
- *Partners in general are taking responsibilities to their duties and giving feedback to each task needed.*

In terms of determining and measuring the partner's **main hopes and expectations** for the 2nd Innovative Trainer partner meeting and the extent to which these expectations were met it is interesting to consider the comments coming through. They provide a very interesting insight into partner thinking:-

- *To review the progress of each partner in the leadership of their assigned WPs and also the expectation that we would clearly set out work activities for the WPs that run during this period (and until the next meeting). Also that we would continue to improve in our use of joint tools.*
- *To maintain the momentum of progress and specifically to agree the share-out of work for WP3*
- *Project development and results up to that date were consistent with the project plan.*
- *To use SVN and other tools: Pearltrees, Popplet etc.*
- *To get the results of the TNA and to plan the materials adaptation phase*
- *To develop a clear plan of action for the next 6 months*
- *To get agreement of the outline of the training programme, and assign tasks and deadlines.*
- *To finalise the WP2 deliverable document and set up the starting basis for WP3*

It is very encouraging that partners went into the second meeting with such clear and well thought out expectations – it shows a high level of ambition and a very focused work ethic.

In terms of satisfaction with the 2nd partner meeting, the partner satisfaction was commendably sustained at 100% satisfaction level. The following highlights were singled out for emphasis:-

- *All partners departed Valencia fully briefed and in agreement as to what was expected of them*
- *My expectations were met in full.*
- *Generally speaking they were. To explicit: - Leader and other partner work activities were covered and documented well (using the technology tools adopted by the project at the outset). Our use of tools to collaborate on the accomplishment of our tasks has improved - particularly in the use of PiratePad to document our meetings (and indicate open questions, consensus levels and actions items), the use of Skype and PiratePad to run our bi-weekly conference calls, Popplet to layout our joint mind maps of work processes and the SVN to archive ALL documents related to the project (ongoing WP related documents, but also financial information, support documents, etc.).*
- *Not all partners took the time to delve deeply into the material from the IIME modules - in part this is due to the fact that some partners were actually the module creators (3 out of the 4 modules - with only module 3, lead by Fraunhauser - who is not a partner here in ITP -being "orphaned" - but reassigned to UPV). I would have liked all partners, especially the "new" ones to have gotten deeper into at least a full review of all modules so as to have early and better congruence with the overall project, and especially WP2.*
- *The broad outline was 'hammered out' and agreed during the meeting. Discussions were lively and extremely fruitful. The involvement of ALL partners in the discussion and decisions was exemplary. The project manager ensured that each partner contributed, and that their contribution was debated.*
- *The WP2 base line audit needed more time. Since some partners had problems securing an interview with Government contact. .*

Partners were asked to provide comment on the **most beneficial outcomes/highlights of the 2nd partner meeting**. The feedback is very insightful:-

- *It was clear from the meeting that we work very well as a team and working through the agenda, delegation of further work was made and any concerns were discussed.*
- *Very solid advancement on WP2 - especially with the review of early results to the surveys.*
- *Better clarity of the upcoming key WPs (such as WP2) - dates, deadlines, activities. In part this is greatly due to the fine work done by Conor Patterson in his "IIME CRITIQUE".*
- *All individuals are "getting" the great value of tools such as PiratePad, Popplet and Pearltrees, and their inter-linkages for being both more efficient and more effective in reaching out goals in a superior way.*

- *The work plan for WP3 and its associated schedule for completion*
- *Each partner has understood very well what to do and project development did not suffer any delay.*
- *Presentation on learning technologies by Polimedia from UPV.*
- *The results of the TNA*
- *MindShare's presentation of tools.*
- *The formation of the plan for development of the training materials.*
- *Have feedback about the survey results representations and the highlights that will be used to define the most important topics on the WP3 To assign responsibilities on the different modules of WP3*

Partners were asked where there **parts of the 2nd partner meeting that they didn't feel were worthwhile or productive.** Like the 1st partner meeting the feedback does not give rise to any concern:-

- *No, not really. it was well laid out and used our time very efficiently with major chunks of time/energy being given to the most important items.*
- *It would have been useful to know in advance that it would take only one and a half of the 2 days scheduled*

Momentum Consulting conclude that the first and second Innovative Trainer partnership meetings were highly successful. We are impressed by the strong bond that was established between project partners with mutual respect and shared ambitions in evidence.

Partner Co-Operation

To assess partnership progression, we asked partners did they feel their colleagues were cooperating fully in advancing their work package. Impressively all respondents (100%) were satisfied that their colleagues were co-operating. The comments give insight into the partnership workings:-

- Co-operation is evident in all phases. Each partner contributes to the various Skype calls and deadlines are being met. The collaborative working environment ensures that all partners are visibly contributing to the realisation of goals.
- I can especially see this as I can now "monitor" each team's progress in the multi-stage process of producing our deliverables for WP3. The WIP (work-in-progress) is supported by our tools and gives us all a view not only of progress but examples we can learn from thanks to the work broken down in module teams.
- Partners are quick to comply with requests, also attendance rates for Skype calls are consistently high

- Partners are all experienced in collaborative working, which works very well
- Pilot testing has not begun as yet, but the partners are interested in testing methodology that will be used.

We asked partners were they satisfied with the quality standard of work undertaken by the other partners in progressing their work packages thus far in the project. Very impressively (and most unusually in project partnerships) all respondents (100%) were satisfied with the quality of the work undertaken. The commentary in relation to this quality topic is interesting:-

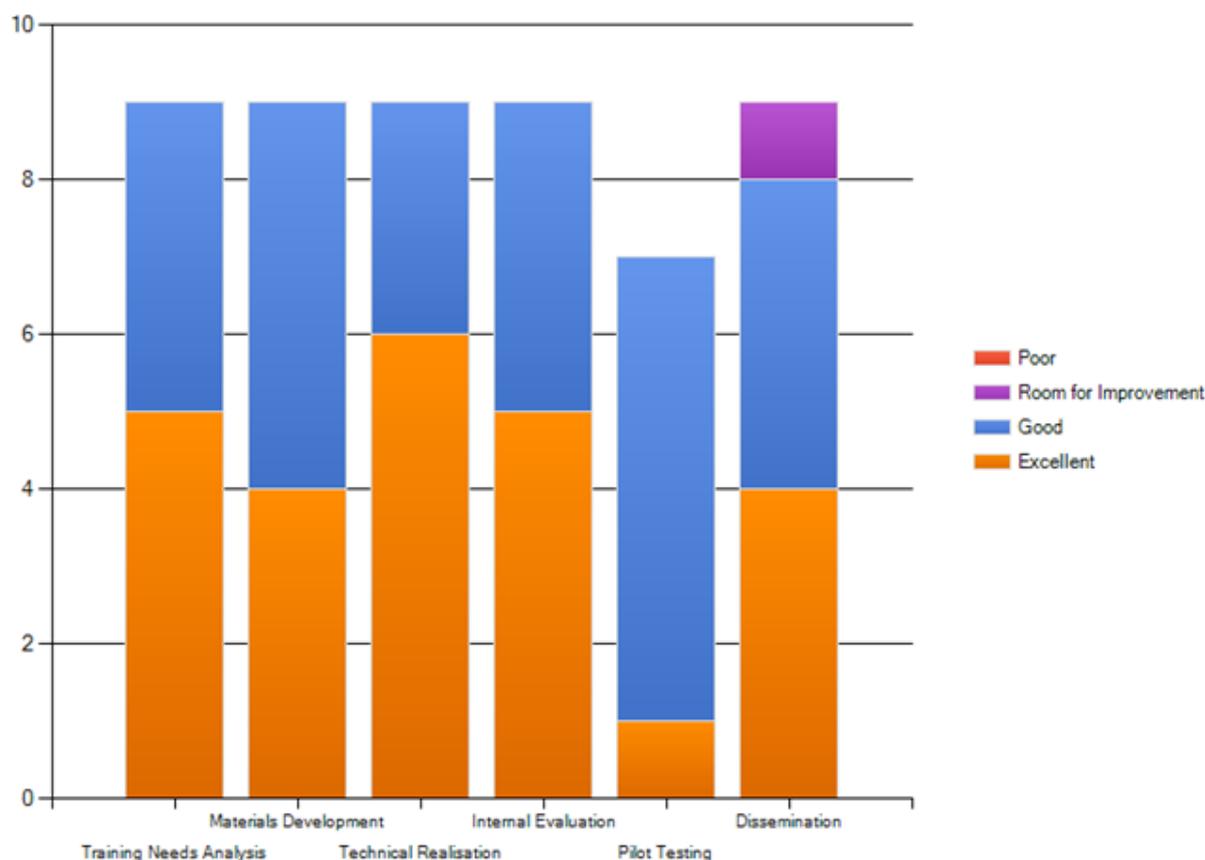
- *All the partners are professionals and work to a high standard of quality.*
- *The standard of work thus far has been consistently high making an excellent foundation on which to base future work packages.*
- *All partners recognise the importance of producing a training package that is of a high standard .*
- *Up to this moment I am very happy with how they worked all partners.*

Work Package Progression

We asked partners to rate progress across each work package, the findings are interesting:-

- The TNA work package receives a very favourable rating with 56% respondents rating the work package as excellent and the remaining 44% rating it as good. This is a very impressive rating justified by the wholesome praise for this work package.
- There was a slightly lower response level to the Materials Development work package which recorded 44% respondents rating the work package as excellent and 56% rating it as good – still a very commendable rating.
- For technical realisation, 67% rated the work package as excellent and 33% rated it as good. This is a very strong rating for this early in the project.
- Internal evaluation a very favourable rating with 56% rating the work package as excellent and 44% % rating it as good.
- In referring to the pilot test work package, respondents are rating the plans for same as opposed to the executive of the work package which will not happen until much later in the project lifecycle. At this point, 15% rated the work package as excellent and 85% rating it as good.
- The dissemination work package is performing well in the early days of the project with as 44% of respondents give it an excellent rating, 44 % ranking it as good and 12% stating there is room for improvement. This does not cause any concern in that dissemination builds as the project has more content to disseminate !

We can present a full overview of these findings in graph format:--



Project Management

Partners were asked how they would evaluate the overall level of communications within the partnership in the first 2 quarters of project implementation. Respondents were very clear in their satisfaction of same with almost 67 % rating same as excellent and the remaining 33% rating it as very good. In our evaluation experience, this is a very impressive rating and gives testament to a well working partnership.

Looking back on the first two quarters, participants were asked **did the Lead Partner correspond with you frequently regarding progress?** 100% said yes. The comments give insight into the performance of the project's lead partner:-

- *In addition to our Skype/PiratePad mediated bi-weekly meetings - of ALL partners - we have also had conference calls in smaller groupings to clarify and document our work. There is also good collegial approach to sharing information on conferences, documents, videos, links, etc. that can*

contribute to our work or to a specific work-package or deliverable. This really helps to maintain motivation and gives a feeling that everyone is fully invested - at all times.

- *Yes, through regular fortnightly Skype calls and regular emails*
- *NMEA ensures the coordination and fully realized all the agreed requirements.*
- *Yes we have Skype meeting every second day, my Skype bill is huge!*
- *Regular Skype calls and emails.*

Partners were asked how they would **evaluate the project management and leadership demonstrated by the Lead Partner** in the project to date. Respondents were very clear in their satisfaction of same with 89% citing the performance of NMEA as excellent and 11% rating the performance as good. Partners shared their perspective

- *One has only to look at the working relationship, the progress and the levels of motivation of all partners - this stems primarily for the dedication and professionalism of our lead partner.*
- *Regular evaluation of how project is progressing, any issues dealt with addressed quickly*
- *Project management is provided with professionalism by NMEA.*
- *Exemplary*
- *Collegiate, collaborative approach ensures that quality work gets done in a timely and efficient manner. There is a real feeling that the project is being kept 'under control'.*

We are very impressed that the performance to date based on this feedback has been exceptional. All respondents were also satisfied with the performance of NMEA in terms of financial administration, commenting 'excellent' and 'straightforward'. The group has been regularly updated on budget details when necessary, the lead partner is quick to respond to budget related enquiries.

We asked the partners **did they feel the project has been active in communicating with its intended target group**. 78% of respondents verified that project was active in communicating with the target group while the other 11% cited that the project was active in communicating with its intended target group but that it was planned with the remaining 11% citing there was room for improvement in this area.

Dissemination

A very important function of the project, we asked the partners **what dissemination tools they found most effective** in promoting this project locally thus far. The responses impressively cover a wide spectrum of dissemination approaches:-

- *Since we are in the early stages I feel that our project website, Facebook pages (there is a main project page and even one for France, in French), LinkedIn group and twitter use are driving awareness and interest in our project.*
- *The 1st eZine was produced to a very high standard and resulted in several interesting leads.*
- *Newsletters to members of our organisation*
- *Presentation of website at workshops, meetings and conferences*
- *The Business Bulletin publication which has over 1000 business advisers and economic development people subscribed to it*
- *Targeted emails and flyers prepared in-house. The simple clarity of the logo makes it very easy to produce flyers in-house*
- *University online publications, Research Center website, Research Conference*

We asked respondents to share their dissemination **highlights for the first 6 months of project implementation**. Responses are impressive:-

- *From my point of view the fact the our facebook "Innovative Trainer - France" page already has 42 members is encouraging.*
- *The upcoming production of "handout" materials such as project business cards - which have already been designed and soon to be produced - will be a big help.*
- *Most importantly the first eZine has been produced, and disseminated, in all the languages of the project (English, French, Spanish, Romanian) - this effort will continue.*
- *eZine 1 and the project website which looks extremely professional*
- *People involved in technology transfer have realized the need and importance of such a project.*
- *Meeting with Business leaders and Business intermediaries; E-zine; Short information in the Official Bulletin of the Chamber of Commerce and Industry of Bucharest (13.03.2013).*
- *The Business Bulletin" which has over 1000 business advisers and economic development people subscribed to it*
- *Regional Government responsible of the SMEs have knowledge about the project. The Transfer Technology Center of Universitat Politècnica de València also knows about the project and the kind of material we will produce. The Head of Life Long Learning Center of the UPV also know about the project and will facilitate free access to the "upv media tools" to record and produce high quality learning materials.*

Exploitation

We asked partners to identify if progress was made on the exploitation strategy thus far in the project. A very impressive 75% of respondents feeling that progress has been made while 25% felt no progress had been made. This is a very impressive finding this early in the project lifecycle. The comments are interesting to review:-

- *At this early stage the main, but essential, progress has been related to IPR agreements among all the partners.*
- *An exploitation plan has already been drafted and agreed.*
- *The IPR agreement has been agreed and is in the process of being signed by all partners, the exploitation and dissemination lead partners have agreed to look at a joint approach to advance this work package*
- *Initial discussions which has highlighted we have to convert the programme exploitation to a more local strategy*
- *EBN coordinates this work package. UPB will make a presentation of the project with the occasion of the Workshop Productica-2013 (31.05.2013) in Bucharest.*
- *Yes, we have an IPR agreement ready to sign*
- *Partners have agreed on the exploitation strategy, including the IPR agreement which was amended based on fruitful discussions at the Valencia partner meeting. Implementation will be concentrated in the final 9 months of the project, and particularly the last 4 months when the national and European launch events will be held.*
- *Too early*

Partners were given the opportunity to **highlight areas of importance** in this first external evaluation report. Interesting feedback was forthcoming:-

- *Collaboration, congruence, consensus and progress in all key areas.*
- *The fact that partners are working as a cohesive unit delivering results on time and to standard*
- *Bearing in mind we are working with European partners the SVN and Skype calls have been an excellent communication tool. It is quite clear that all partners have bought into the project and are working towards the same goal of producing a high quality training material*
- *Involvement of the coordinator in the smooth running of the project is done in a fair and very effective way.*
- *Cooperation between partners is very good.*

- *The Baseline Audit was very well accomplished: Review of literature, Consultation with BTMs and compilation and Data Analysis.*
- *All good*

Conclusion

Momentum Consulting conclude that the first and second Innovative Trainer partnership meetings were highly successful. We are particularly impressed by the strong bond that was established between project partners with mutual respect and shared ambitions in evidence. This external evaluator was highly impressed with the meeting dynamic. . The lead partner is facilitative in their style and partners relate well to each other with deliberations both engaging and progressive. We have been particularly impressed with the high level of communications within the partnership between meetings which is even further enhanced by the bi monthly Skype meetings and the level of usage of the Trac project management system.

Recommendations

Given such a strong overall project performance, there is really very little we can recommend in terms of project enhancements at this stage. We are interested to track the level of project momentum is sustained after this excellent project start and urge the partners to build on their early progress to really deliver a project of substance and reach.