Evaluation strategies for Leonardo da Vinci pilot projects:
Information, theory and practical questions

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Foreword

This Handbook on evaluation strategies for Leonardo da Vinci pilot projects is, provisionally, the last in a series of three. These guides are intended help Leonardo da Vinci project managers to bring their projects to a successful conclusion. Given the high standards required of the end products, and the requirement that these be effectively disseminated, those running Leonardo projects have no easy task. Systematic evaluation is an important tool for achieving the desired results.

Apart from providing a theoretical framework, this handbook offers above all practical assistance on how to go about evaluation when implementing a Leonardo project.

This set of handbooks is part of a package of measures and activities intended to support project managers when implementing their projects. We usually talk about “monitoring”. This involves supplying information by means of e-flashes, a helpdesk, advice/counselling, annual visits to projects, various publications and guides at national and European level, training activities for project managers, events organised for project managers, national and European seminars, workshops and conferences, etc. Alongside reporting, control and auditing requirements, a framework is thus created within which project managers are not only monitored, but above all given support. The ultimate aim is, quite literally, to achieve an excellent result. This means not only coming up with a good, innovative product, but also putting it to use as already indicated in the dissemination plan.

It is not the intention that European tax-payers’ money be used to finance an excess of Leonardo products. The idea is that these products should be used to bring about a genuine improvement in vocational training in Europe. Thus everything revolves around spin-offs and impact. In Eurospeak, the word “valorisation” is used – which is not easy to translate into Dutch. Our Flemish colleagues have neatly paraphrased this as “building on the achievements of the programme”. In the remaining years available to Leonardo, valorisation measures will be an important element of the programme at both national and European level. The government and the social partners in the Netherlands support this refocusing within the Leonardo programme. At a conference in Madrid on 29–30 April 2002, an appeal was made for more attention to be given to dissemination and valorisation activities, representing a move from a production programme to a distribution programme, or from a product-based approach to knowledge-management.

In this way, the primary objective of the Leonardo programme, namely improving vocational training in Europe, can be achieved on the basis of excellent-quality products. Better vocational training is an important step on the way to a better Europe, and a better future.

Jos Tilkin
Leonardo da Vinci National Agency, Netherlands
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Introduction: a conceptual framework for evaluation strategies

The aim of the Leonardo da Vinci programme is to pursue a policy of renewal and promote international cooperation in the field of vocational training. It does this by supporting development projects aimed at bringing education and business more into tune with each other, and at introducing new approaches and methodologies.

The Leonardo da Vinci programme has been in place since 1994, and entered its second phase in 2000. Projects in the first phase of the programme were judged on the quality of the final report and the efficiency of the financial management. If this was all in order, the project itself was considered to be in order. The quality of the final product was hardly taken into account. This is completely different in the second phase. On the basis of experience gained, the Leonardo da Vinci programme is in this phase putting greater emphasis on the quality of the projects. For this reason, an important change has been introduced, namely an evaluation of the final product by an independent panel. The final assessment's greater emphasis on the quality of the projects and of the products resulting from them means that the evaluation activities of the partnership itself have become more important than before.

In the Leonardo pilot projects completed up to now, project evaluation has hardly played a role (which is why no useful examples are available). In order to assist coordinators in preparing for and carrying out their evaluations, the National Agency has decided to draw up this handbook on evaluation strategies.

Evaluation activities in Leonardo da Vinci projects focus on the systematic preparation, checking and assessment of project activities and results. This includes in particular the identification of project aims, conditions and requirements, continuous monitoring of progress on this basis and also in relation to the planned project stages, and the assessment of project results. The partnership’s evaluation activities involve the collection and appraisal of information concerning the strong and weak points of the project and/or the products resulting from it, which may offer pointers on how to make improvements. Evaluation should be a recurring, cyclical process geared to and enhancing the quality of Leonardo da Vinci projects.

How should one go about evaluating a Leonardo da Vinci project? It is important to first of all establish the aim of the intended evaluation. Once this has been done, it can be determined how best to achieve this. This handbook on evaluation strategies is designed to give project coordinators and their partners more insight into the role which evaluation can play in Leonardo projects. We also offer a number of suggestions for a successful evaluation strategy, thereby increasing the likelihood that the quality of the project, and of any interim and final products, will lie in the partnership’s own hands.
Partnerships should use an evaluation plan in their projects, with a view to enhancing the quality of projects and any final products developed as a result. It is a question of the partnership itself taking the initiative. Ideally, the coordinator and partners will draw up the evaluation strategy right at the beginning of the project.

This guide is intended to draw the attention of project coordinators and partners to the importance of evaluation for successful progress with and good results from Leonardo da Vinci projects. Alongside this contribution to the quality of projects and their results, a good evaluation strategy will also make it easier to draw up the interim and final project reports for the European Commission and/or the National Agency.

In the interim and final project reports, a financial statement of project income and expenditure must be provided. Evaluation strategies for Leonardo da Vinci pilot projects do not focus their attention on this financial assessment. Instead, we would refer readers to the Administrative and financial handbook for project promoters.

One of the National Agency’s tasks is to monitor the Leonardo projects in the Netherlands. The NA has a dual and sometimes conflicting role to play here: on the one hand it acts as an inspector (as regards project advancement and finances) and on the other hand as a supporter and advisor. If the NA is able to examine the (self-)evaluations which the partnership has drawn up in the meantime, its supportive and advisory function can be planned and implemented in a much more focused way because it is already aware of the background to the project and its context.

This handbook is intended to be a help in evaluating Leonardo projects. This kind of evaluation must be distinguished from an assessment of the Leonardo da Vinci programme as a whole. The programme evaluation goes beyond individual projects, and looks at whether and how the Leonardo da Vinci programme (except for the pilot projects and thus also the mobility projects, language projects, transnational networks and surveys) has contributed towards renewed international cooperation in the field of vocational training in Europe. The evaluation also looks at the programme’s internal workings.

In addition, the European Commission makes provision for what are known as “valorisations”. A “valorisation” involves the results of Leonardo da Vinci activities which are focused on the same specific subject-area being grouped together and analysed with the aim of, firstly, increasing the European “body of knowledge” in the field concerned and, secondly, identifying points of reference for renewed international cooperation in that particular area of vocational training.
Evaluations can take various forms. What they have in common, however, is that they are planned in advance to a greater or lesser degree, that data are collected and analysed and then set against a standard or a given expectation, and that an assessment is then made on this basis.

_Evaluation strategies for Leonardo da Vinci pilot projects_ have a specific aim: the promotion of evaluation activities in Leonardo da Vinci projects, activities which aim at improving the quality of those projects. In order to provide the coordinators and their partners in Leonardo da Vinci projects with more insight into how they can arrive at an evaluation strategy, we will set out a conceptual framework at the start of this guide. This includes the most important questions which arise in connection with the evaluation of Leonardo da Vinci projects:

- **Why** and **when** must the evaluation be carried out? These questions must be answered before the partnership can determine how to go about its work.
- **What** has to be evaluated?
- **How** must the evaluation be carried out, and by **whom**?

Every project can devise its own unique evaluation strategy adapted to its needs by combining, in its own way, decisions concerning the five questions of the conceptual framework. Given the developmental character of the Leonardo da Vinci projects, any evaluation strategy arrived at must, however, be flexible rather than rigid. 

Annex I presents a tool with which the partnership can devise an evaluation strategy and get it up and running.

Regarding the question as to why an evaluation is carried out, an important distinction has to be made between an ongoing and a general evaluation (see section 2). The question of whether a process or a product is being evaluated also partly ties in with this.

As far as the question of “when” is concerned, an important factor is whether the evaluation is _ex ante_ (in advance), ongoing (during the project) or _ex post_ (afterwards). The meaning of these terms is explained in section 2.

Concerning the question of what must be evaluated, a distinction is made, for the purpose of Leonardo projects, between four types of evaluation, each of which raises its own issues and may affect the choice of assessment methods. These types of evaluation are:

- **Evaluation of components of the project process.** This is very important for an “ongoing” evaluation. Aspects of Leonardo da Vinci projects which are central to such an evaluation are: management and structure of the project; the start of the project (point of departure); the declared project aims; the working methods by which these aims are to be achieved; feedback at regular intervals at the development stage, and the testing of newly developed products.
- **Interim evaluation** half way through a project, and the _final evaluation_ following its completion.
• **Assessment of the impact of the project.**
  Leonardo da Vinci projects are not promoted and subsidised just for the fun of it; they are intended to encourage innovation which will influence education and training on a wider scale.

• **Meta-evaluation.**
  This involves a critical consideration of the contribution made by the evaluation activities to the quality of the project in terms of its implementation and results.

Each type of evaluation is looked at in more detail in section 3; we will also set out the relevant questions for the evaluation concerned, and also the methods best suited to your needs (section 3.5).

The questions of how evaluations are to be carried out, and by whom, are dealt with in section 4. The handbook is aimed at coordinators and partners in Leonardo projects with little or no experience of systematic evaluation activities. In this section, we therefore establish a direct link between the answer to the question of how the project coordinator and/or his partners can carry out their evaluation, and the type of evaluation involved, i.e. what is being evaluated? Seven methodologies or tools for possible use in the evaluation can be considered: project descriptions, records of meetings, group discussions, individual interviews, written questionnaires, observations and tests.

All these techniques can be used by the project partners in a self-evaluation procedure. However, they can also form part of a procedure in which external assessors take the lead. Section 4 gives a brief explanation of these methods and of the advantages and drawbacks of self-evaluation and external evaluation, and also offers guidelines on putting them into practice. These seven techniques were selected on the basis of theoretical knowledge of and insight into the nature and potential of Leonardo da Vinci projects. It is not an exhaustive overview of existing evaluation methods and instruments which is being presented. Nor is this guide intended to be textbook for evaluations. For technical support in the field of methodologies and instruments, questionnaire construction and (statistical or non-statistical) analysis of data, please refer to existing textbooks and handbooks.

Sections 2, 3 and 4 are structured in the same way. First of all, a component element of the conceptual framework is presented. This is followed by a consideration of all points arising in this connection. This will enable you to constantly interpret the points raised within the context of the model seen as a whole.
Evaluation strategies: conceptual framework

1. Evaluation: why and when?

<table>
<thead>
<tr>
<th>Why?</th>
<th>When?</th>
<th>In advance (ex ante)</th>
<th>During (ongoing)</th>
<th>Afterwards (ex post)</th>
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<tr>
<td>Ongoing</td>
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<td>General</td>
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2. Evaluation: what (aspects are to be evaluated)?

**Evaluation of parts of the project process**

1. Management and structure of the project, timetable
2. Collection of information for determining the starting point
3. Establishment of the project aims (products)
4. Determining the working method for achieving the project aims (process, roles of the parties involved)
5. Feedback at the development stage, leading to improvements or adjustments
6. Testing of the newly developed products (Possible introduction of improvements)

**Final evaluation of the project**

a. process b. contributions of the project partners c. final products d. European dimension e. positive and negative spin-offs f. project facilities

**Assessing the impact of the project**
- Impact in context: vocational training, national education system – dissemination

**Meta-evaluation**

3. Evaluation: how (evaluation methods) and by whom?

<table>
<thead>
<tr>
<th>How?</th>
<th>By whom?</th>
<th>Self-evaluation</th>
<th>External evaluation</th>
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<tbody>
<tr>
<td>Project descriptions - qualitative</td>
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<td>Reports of meetings - qualitative</td>
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<td>Tests - qualitative/quantitative</td>
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Evaluation of Leonardo projects: why and when?

**Section 1 of the conceptual framework**

<table>
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<tr>
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<th>When?</th>
<th>In advance (ex ante)</th>
<th>During (ongoing)</th>
<th>Afterwards (ex post)</th>
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<tr>
<td>Ongoing</td>
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<td>General</td>
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Depending on the answer to the question of “why”, a distinction can be made between two types of evaluation in Leonardo da Vinci projects: general evaluation and ongoing evaluation.

“General evaluation” is geared to assessing activities and results in retrospect/at the end of a project. This is often carried out for an external “client”, for example in order to check whether or not contractual obligations have been fulfilled. The decision whether or not to continue with a project often depends on the findings of a general evaluation. In the past, the emphasis was placed on such evaluations in Leonardo da Vinci projects. An assessment of the financial management and of the income and expenditure situation at the end of a project is an example of a general evaluation. The recently introduced, specific appraisal of the quality of the end products of a project by an independent jury in the second phase of Leonardo da Vinci can also be regarded as a general evaluation. Financial evaluation and independent product assessment form no part of the evaluation which the partners in Leonardo projects carry out themselves, and are thus outside the scope of this handbook. By way of preparation for this general evaluation (which is often but not always carried out by external assessors), the partnership can also carry out self-evaluations (or arrange for these to be carried out), for example by testing a final product in a real-life situation, or by submitting its financial records to an accountant. An evaluation of this kind is both ongoing and general in nature.

“Ongoing evaluation” is geared to developing and improving activities and results during the course of a project, i.e. at the draft stage, the development stage and, where applicable, the pilot phase. Because of this dividing-up into periods, this is often also referred to as process evaluation during the implementation of a project. Constant improvements in quality are the aim of ongoing evaluation. Pertinent questions which then arise are: What works well in the project, and what does not? Why? What can be done to continue with the project more effectively? The decision to readjust a project process or objective is the result of an ongoing evaluation.
For the partnerships involved in Leonardo da Vinci projects, the differentiation between general and ongoing evaluation is very relevant – not so much in order to make a choice between them, but in terms of a fruitful combination of the two. This combination is desirable in order to enhance the quality of projects – and at the same time their results – and, where necessary, also in order to improve the chances of a project being continued.

The question of “when” an evaluation should take place is closely linked to the aims mentioned above. In principle, a distinction can be made between three types of evaluation: ex ante (in advance), ongoing (during the project) or ex post (afterwards). For an effective combination of ongoing and general evaluation, it is necessary to constantly keep an eye on the state of a project.

A formal ex ante evaluation of a Leonardo da Vinci project is carried out by the National Agency or the European Commission during the selection and award procedure. Each project proposal must give a detailed account of the project’s aims and its viability. The feasibility of a project must be ensured before either the project partners or the National Agency and the European Commission are prepared to get involved. Other ex ante evaluations are not used for Leonardo da Vinci projects, or hardly ever. The programme and the projects are, after all, geared to developing and introducing innovations in vocational training. In the process, new approaches are adopted, and the outcome of the activities cannot be fully predicted.

An ex ante evaluation may, however, be carried out during a project. Products or materials developed in the course of Leonardo projects are generally considered to have an impact on a (sometimes large) target group. Before a decision is taken to actually produce and/or implement such products or materials, it may be very useful to carry out an ex ante evaluation in order to establish how this can best be done. Such an evaluation will enable a project to be pursued further in a well thought-out way and, in this respect, forms a component part of ongoing evaluation.

Relying solely on an ex post evaluation will not achieve much, since this has little or no impact as regards improving the quality of projects. There may even be some risks involved in a general evaluation in that shortcomings emerging during the course of a project are sometimes difficult to correct or rectify at the end of a project or thereafter.
Evaluation of Leonardo projects: what (which aspects)?

Section 2 of the conceptual framework

3.1 Evaluation of parts of the project process

Ideally, an evaluation of Leonardo da Vinci projects must have both a general and an ongoing component. With this in mind, there should therefore be a constant assessment of component parts of a project (e.g. project phases or “task packages”) during its course. This would appear at first sight to be a time-consuming business, but it must be borne in mind that if ongoing project evaluations are carried out, the final evaluation is only a small step. Much of the earlier work can be input into the final assessment. The implementation of both general and ongoing evaluations during the course of a project tends to involve a shift in the timing of the workload, and a shift in the workload itself. In addition, it is often...
easier to carry out regular evaluations (when experiences are still fresh in the memory) than at the end of a project, by which time a lot of details have been forgotten.

Six aspects which are relevant to an ongoing evaluation, are included in part 2 of the conceptual framework:
1 project management and structure, including planning;
2 the initial situation, i.e. the starting point for the project;
3 the declared project aims (e.g. products);
4 the working methods for achieving these aims;
5 feedback at the development stage;
6 testing newly developed products.

These aspects will be considered in more detail in the following paragraphs.

3.1.1 Management and structure of the project, including the timetable

An initial aspect which has to be assessed from time to time will be the management and structure of the project. Particular points to bear in mind here are:

Box 3.1

- proposed timetable
- stages in the process (including "task packages")
- planning of the various phases
- task allocation
- allocation of responsibilities
- timetable for the project
- monitoring of progress
  - budgetary control
  - contractual terms
- dissemination of information
  - the European dimension of the project

Generally speaking, the project coordinator is the main source of information on the management and the structure of a project. However, it may also be worthwhile to involve the other project partners since they also have valuable information to contribute.

Questions which can be asked, include, for example:

Box 3.2

Are the various elements in the management and structuring of the Leonardo da Vinci project
- feasible?
- effective?
- efficient?
Leonardo da Vinci projects are usually divided up into a number of steps ("task packages"). These planned project phases can give very useful pointers for any evaluations to be carried out. Questions which can be asked, include, for example:

3.1.2 Initial situation: the starting point for the project

Leonardo da Vinci projects are considered to be innovative. This innovative input must be made quite clear so that the project aims can be seen to be different from "normal" activities. From the evaluation viewpoint, it is important that the starting point for the project be set out clearly and explicitly. Only then can it later be determined what has actually been achieved. The initial situation is the yardstick against which the results of the project can be measured.

The starting point can be, and to a certain extent should be, set out in the project proposal, i.e. before any project-related activities take place. However, this can also be done in the first phase of a project. Another possibility is to give a rough description of the initial situation in the project proposal, and then to provide more details when the project begins. This can be done, for example, in order to gain a better idea of the views of potential users of the project results. In this case, the project partners collect information on the subject of the project in order to determine what is useful for the new approach, what it must avoid, which elements should be combined, and where there is a need for further development work. It is important that each project incorporate existing knowledge – not in order to avoid duplication of results, but to exceed previous achievements and find better solutions to specific problems.

Insights into the starting point for the project (initial situation) can help to improve projects. Relevant questions in this connection include, for example:

Box 3.3

- Has the task referred to in the “package” been carried out?
- Has the task been carried out to the satisfaction of the partnership?
- Has the task been carried out to the satisfaction of the possible target group?
- Do the steps taken up to now contribute towards achieving the intended final outcome of the project?
- Will the working method in subsequent stages of the project have to be adjusted on the basis of the results of the interim evaluation?

Box 3.4

- Which procedures were used to determine the initial situation?
- Who was involved in this?
- Was this done before the start of the project or during its initial phases?
- Was the starting point clearly defined?
- Were all project partners properly informed about this?
- Was there general agreement about the initial situation as determined?
- Was the initial situation actually used as a reference point for the development work?
- Which aspects were emphasised in the context of the initial situation (e.g. content of current courses, target groups for the project, teaching methods and other approaches, existing measures for vulnerable young people which are applied outside the education system)?
3.1.3 The declared project aims

In proposals for Leonardo da Vinci projects, the initiators must make it clear that the aims of the project come under the objectives and priorities of the Leonardo programme, and any additional priorities which have been laid down at national level.

As a rule, the clearer the aims, the easier it is to evaluate a project. In Leonardo projects, which are geared to innovation in the field of vocational training, this is not always the case, however. To a certain extent, an aim can be stipulated at the beginning of a project, but the process then reaches a point where a specific product emerges. It is often difficult to determine in advance what that product will be like – a state of affairs which is peculiar to innovative development projects.

The aims of Leonardo pilot projects are often specified in terms of resulting products. Setting out a specific aim in terms of a well-defined product is an ongoing process on which attention should be focused at the various stages of a project. Regular consideration of project aims increases the chance that a project can be effectively and efficiently steered in the desired direction.

Social developments and/or experiences gained in course of a project may result in the project aim having to be shifted or adjusted. Changes in the project aim, and thus also in the products being striven after, may make it necessary to amend the contract with the National Agency. By and large, this need is less readily apparent where the project aim is defined in terms of the function of a product (such as a new method for checking vocational qualifications) rather than as a specific product (such as the development of a computer-aided test).

Evaluation-related questions concerning project aims include, for example:

- Were the project aims set out in the project proposal with sufficient clarity to enable the necessary activities to be determined?
- Who was involved in setting out the initial aims of the project?
- Was there general agreement within the group about what the project aims should be?
- Was any attempt made during the project to further specify the project aims apart from the product development?
- Who contributed to these further specifications?
- Was it possible to achieve the objective, or did it have to be adapted?
- If adaptations were necessary: what did these involve and did they lead to a better result?
- Was the National Agency contacted in connection with these adaptations?
- If so, what was their response?
- Did the project group take the relevant quality criteria into account when working towards its objective (training and courses)?
- If so, which criteria?
- On the basis of your project experience, can you make useful suggestions to any project coordinator or partner about how they should set out their project aims?
3.1.4 Determining how to achieve the project aims

Once the starting point for a project and its aims have been determined, ideas can be developed as to how these are to be achieved, and how the current situation can be transformed into the desired situation. To an extent, the way in which a partnership is to achieve the project aims is also set out in the project proposal, but these become more and more specific as a project proceeds. Regular deliberation on the working methods used can help to keep a project on track.

Relevant questions concerning the working methods of the partnership designed to achieve the project aims, include:

Box 3.6

- Which project stages are set out in the proposal?
- How were these stages implemented in practice?
- Were the planned stages adequate and sufficient to achieve the project aims?
- If not: why not and what changes had to be made (additional or alternative steps)?
- Were the phases of the project carried out on time?
- What would you do differently if you had to set up and implement the project again?
- Which partners were involved in the project?
- What is/was their task or role? Is/was is their task description specific enough?
- What responsibilities do/did they have?
- Did the partners carry out the tasks expected of them?
- If not: who failed to do so, and why?
- Did the tasks assigned to the partners match their respective capabilities?
- Were the tasks assigned to the partners realistic within the given time-frame and budget?
- Were the partners themselves happy with their contributions?
- What was the atmosphere like within the group?
- Did the members of the project group communicate effectively?
- If not: why not?
- Did language problems make communication more difficult within the project group?
- Which solutions did the project group consider/apply in order to deal with such language problems?
- How can work within project groups be optimised?

3.1.5 Feedback at the project development stage

Regular requests for and provision of feedback at the development stage of a project are essential, since this maintains and even increases the partners’ involvement in the project. It also ensures better quality of the products or the project results. However, not all feedback need necessarily lead to immediate adjustments. In other words, feedback must also be assessed critically before the partnership takes a decision whether or not to adjust the project process or the products.

Feedback on the project process (steps taken, role of partners) are suitable subjects for the agenda of project meetings. Other possibilities are also available, however. Feedback concerning products can be given in group discussions or in one-to-one exchanges, for example.
Evaluation-related questions concerning feedback include, for example:

**Box 3.7**

- Was provision for feedback made in the project proposal?
- Did this relate to both processes and products, or only to one of these?
- Was there actually any feedback? If so, how was this done, and by whom?
- Did this lead to changes in the project?
- Was the feedback constructive?
- Did the feedback clearly lead to improvements in the project process and products?
- How was the functioning of the project group affected by the process-related and the product-related feedback?

### 3.1.6 Testing of newly developed products

Newly developed products can be tested in several ways, ranging from an initial appraisal (e.g. by colleagues or members of the target group) to a comprehensive introduction of the products from a pilot project, or even by means of a test of practical everyday use. Leonardo projects vary quite a lot. This is true, for example, of their target groups, training measures and teaching methods. This makes it difficult to formulate general questions which could be used in evaluating new products. The precise nature of these questions will have to be determined by the project groups themselves.

Some ideas on the type of questions are set out below:

**Box 3.8**

- In which educational context can the new product be placed (e.g. course type and duration)?
- For which target group is the product intended?
- What function(s) does the new material have in terms of education?
- Where was the new product tested?
- What did the test specifically look at, where, and for how long?
- Which partners were involved in the test?
- What were their tasks?
- Which part of the target group was the product tested on?
- How many persons from the target group were involved?
- What was the target group’s assessment of the test (training content, training process, teaching methods, teachers’ contribution, course group)?
- Was the target group subjected to any form of examination at the end of the test?
- What were the results?
- What follow-up to the test is being considered, and is it feasible?
Interim and final evaluation of the project

If a project group has been busy with an ongoing evaluation, the interim and final evaluations for the National Agency do not involve much extra work. The outcome of these activities undertaken in the meantime can be made good use of as regards most aspects of the interim and end evaluations.

The answers to the questions asked in the various parts of this section are important for the evaluation of the project process and the contribution made by the project partners; this especially applies to questions about how the project aims are being pursued.

When evaluating end products, the project group can draw to a large degree on the results of tests involving the newly developed material.

In the section on project management and structure, some attention has already been focused on an evaluation of the European dimension and the project facilities. In the final evaluation, these aspects may play a larger role.

Relevant questions concerning the European dimension of the project include, for example:

- Was the starting point for the project determined on the basis of input from partners from various countries?
- Was sufficient attention paid to the (potential) merits of the project for the various Member States involved?
- Were the project partners given the opportunity to influence the project in such a way that the resulting products can also be used effectively in their own respective context?
- Is there a plan to enable the project’s supranational objective to be taken into account to the greatest possible extent?
- Have implementation proposals been drawn up so that the results of the project have a practical impact in the countries represented by the partners?
- Are any arrangements being made for the results of the project to also be disseminated to countries not directly involved in the project?
- Does the project give a good insight into the situation in various EU Member States?
- Does the project contribute to a definite standardisation and/or transparency of elements of the vocational training system in various countries?
- Does the project enable “good practices” to be highlighted which can benefit various countries?
- Can the project help mobility within its target group?
Examples of questions concerning the evaluation of the project facilities:

**Box 3.10**

- Is the project being adequately run and supported by the coordinator’s organisation?
- Does the coordinator have sufficient time and facilities within his organisation to properly carry out his tasks within the framework of the Leonardo project?
- Does the coordinator have secretarial help available in his own organisation?
- Does the coordinator and/or his organisation have an effective method of handling the project administration?
- Does the coordinator have up-to-date media available for maintaining contacts with the partnership?
- Do the partners have sufficient time and facilities within their organisation to carry out their project tasks?
- Are satisfactory proxy arrangements in place in the participating organisations in the event of their representative being unavailable? Is the potential replacement properly informed about the nature of the project and its processes/procedures?
- Does the partnership have suitable venues for meetings?
- Does the partnership have people it can call in to do any necessary translation work for a fee?
- Have proper arrangements been made concerning the partners’ contribution to, for example, the interim evaluation, the final evaluation, the dissemination of the project results and the financial statement? Have these arrangements been complied with?
- Are there any partners who, in their own field, can tap resources that may be particularly beneficial to the project?
- If so, which ones, and how can they specifically used?

As regards the positive and negative “spin-offs”, the ongoing evaluation – along with the assessment of the project’s impact and the meta-evaluation – probably provides enough information for an overall appraisal within a relatively short time.

All recommendations and questions in this section are also relevant to project groups which decide, for whatever reason, to carry out an evaluation at the end of the project rather than having an ongoing assessment. They can use these recommendations and questions for the purposes of a subsequent evaluation which dovetails perfectly their project and project needs.

### 3.3 Assessing the impact of the project

Leonardo da Vinci pilot projects are funded with a view to introducing innovations in vocational training practice within the Member States. An in-depth evaluation of the impact of a project is therefore needed.

The first and possibly most direct influence which a Leonardo project can have is at the level of the participating educational institutions. Innovations must directly or indirectly impact on educational content or teaching methods in the participating schools or other institutions taking part in the project. This is a minimum requirement.

Project partners should endeavour to exercise an influence going beyond the basic minimum, and should try to disseminate project results to other target groups, such as:
- other schools or organisations, such as education development bodies and firms;
• policy-makers, so that the project results filter through to national, regional or local education;
• the education inspectorate;
• other Leonardo projects which could benefit from the experiences gained, not only as regards products resulting from the project, but also the processes under way within and around the project;
• the National Agency, whose task is to coordinate and promote the Leonardo da Vinci programme and disseminate the results;
• networks of influential experts in the relevant field, in order to acquire their approval and involvement; and
• ordinary citizens, who should be kept up to date with the project results, even if only to show them how some of the expenditure of public funds contributes to the needs of society.

Examples of questions concerning the assessment of the impact of a project include the following:

**Box 3.11**

- What is being disseminated: curricula, courses, experiences, or anything else?
- Was dissemination already a point which was given serious and detailed consideration at the beginning of the project?
- What does the planning for dissemination involve (consider the context, the structure of the plan, the processes entailed, areas of responsibility, the costs and the intended multiplier effects)?
- Do any particular project partners have specific tasks relating to dissemination of the project and its results?
- Which is/are the target group(s) for dissemination: educational establishments, education development bodies, national vocational education bodies, firms, teaching professionals and trainees, supervisors, students, unemployed and employed persons, education inspectorates, networks of experts, other Leonardo projects, the National Agency for Leonardo, and Dutch and European citizens?
- At what level is/was dissemination to target groups taking place: local, regional, national, European?
- What channels are being/were used for dissemination (e.g. Internet, CD-ROMs, videos, books, guides, articles, symposia, conferences, workshops, exhibitions)?
- What has been done to adequately link up dissemination channels and target groups?
- Was dissemination carried out according to plan?
- If not: why not, and what other steps were taken?
- What impact has dissemination had (consider changes brought about and the number of persons encompassed)?
- What, in your view, are the main obstacles to the results of Leonardo projects being disseminated?
- Have language problems had an effect on the project’s impact?
- If so: what problems, and how were they solved?
- Does the project have an impact on the (work of the) project partners’ organisations?
- If so, what impact in which organisation?
- Do the project results have an influence on the (work of the) organisations not involved as a partner in the project?
- If so, what influence in which organisation?
- Has the project had any influence on the national, regional or local education system?
- If so, what influence? If not: why not?
- Can you specify measures which could help to increase the impact of Leonardo da Vinci projects?
We must make a distinction between short-term effects and the longer-term impact of project results. A project can still have an effect on the ground long after it formally comes to an end. It may, for example, take a fairly long time until a curriculum is officially changed. Sometimes the real impact does not become apparent until much later. Sometimes more protracted deliberations are needed in order to look at the results of a project. Expectations as regards the sustainability of project results, and their longer-term effects, must therefore be taken into consideration.

### Meta-evaluation

If, as recommended in this guide, a project assessment is carried out by means of both a general and an ongoing evaluation (see section 2), it also worth assessing the evaluation as such. This “meta-evaluation” can teach the project partners more about the usefulness of their specific evaluation activities, or confirm the suitability of some approaches and reject others as totally or partially inadequate. Relevant questions in this connection include, for example:

<table>
<thead>
<tr>
<th>Box 3.12</th>
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</table>
| • What evaluation methodology and techniques were used?  
• Which aspects were evaluated, and how?  
• Which techniques/aspects were easy to handle?  
• Which ones caused problems?  
• Were any particular aspects of the conceptual framework, which were presented at the beginning of the chapter, not evaluated?  
• What was the reason for this?  
• If you had to evaluate the project again, would you use the same strategy or would you now take a different approach?  
• If you would choose the same strategy: why?  
• If you would now take a different approach: why would you now proceed differently, and what are the main differences between this approach and the one actually used? |

### Which aspects with which methods?

In section 4, we will describe a number of quantitative and qualitative techniques which can be used to collect data by means of which the aspects dealt with here in section 3 can be evaluated. The appropriate technique may vary depending on what aspect is being considered. Table 3.1 shows that project descriptions, individual interviews and group discussions can be handled in all cases, irrespective of whether project descriptions then sometimes have to focus specific attention on a particular aspect, or the fact that the group should not be too large (maximum approximately 10 persons). Reports of meetings and written questionnaires have a more limited range. Written questionnaires are generally only of interest if a larger group of people (more than 15) is involved. Behavioural observations and tests are mainly used to test new products.
<table>
<thead>
<tr>
<th>Evaluation Aspects and Techniques</th>
<th>Project descriptions</th>
<th>Reports of meetings</th>
<th>Group discussions</th>
<th>Individual interview</th>
<th>Written questionnaires</th>
<th>Observations</th>
<th>Tests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management and structure of the project</td>
<td>X&lt;sup&gt;1&lt;/sup&gt;</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X&lt;sup&gt;2&lt;/sup&gt;</td>
<td>X</td>
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<tr>
<td>Starting point for the project</td>
<td>X&lt;sup&gt;1&lt;/sup&gt;</td>
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<td>X</td>
<td>X</td>
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<tr>
<td>Declared project aims</td>
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<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>How to achieve the project aims</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X&lt;sup&gt;2&lt;/sup&gt;</td>
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<tr>
<td>Feedback at the project development stage</td>
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<td>Testing of newly developed products</td>
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<td>Impact</td>
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</table>

1 specific attention paid to this aspect
2 especially in larger groups of informants
3 in not too large groups of participants

Table 3.1: Evaluation aspects and techniques
Evaluation of Leonardo projects: how and by whom?

Section 3 of the conceptual framework

<table>
<thead>
<tr>
<th>How?</th>
<th>By whom?</th>
<th>Self-evaluation</th>
<th>External evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project descriptions</td>
<td>Self-evaluation</td>
<td>External evaluation</td>
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<tr>
<td>Reports of meetings</td>
<td>Self-evaluation</td>
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<td>Group discussions</td>
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<tr>
<td>Individual interviews</td>
<td>Self-evaluation</td>
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<tr>
<td>Written questionnaires</td>
<td>Self-evaluation</td>
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<td>Observations</td>
<td>Self-evaluation</td>
<td>External evaluation</td>
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<tr>
<td>Tests</td>
<td>Self-evaluation</td>
<td>External evaluation</td>
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</table>

In ongoing and ex post evaluations of Leonardo projects, both qualitative and quantitative techniques are used to collect the data serving as a basis for the evaluation. The methods used can be adopted by the project partners themselves (self-evaluation) or by external assessors.

4.1 Methods
4.1.1 Project descriptions

One way to start evaluating a Leonardo da Vinci project is by drawing up a report describing the aspects/activities referred to in the project proposal in order to ascertain whether the project has been implemented as intended.

Relevant questions concerning the project description include:

- What went according to plan and what did not?
- What were the main reasons for this?
- Which elements of the project plan were difficult to implement?
- Why was this the case?
- What alternative measures were taken, and were these successful?
- If you had known what you know now, would you have set out the project proposal differently?
- If so, what would the main differences be?
Project descriptions can be very wide-ranging, but also somewhat “condensed”. Drawing up project descriptions is fairly time-consuming as a rule, but on the other hand they generally also give the most comprehensive assessment of a project. One specific form of project description involves one or more partners keeping a diary or log-book.

Project descriptions can best be given on an ongoing basis as and when certain project stages or phases are completed. If one waits until the end of a project, there is a chance that earlier stages of the project will have been forgotten. A project description must indicate the actual nature of the project and draw on a broader basis than that available to an individual drawing up the description. Project descriptions can be regarded as a qualitative way of evaluating, although quantitative information may also be included.

4.1.2 Reports of meetings

Leonardo da Vinci projects focus a lot of attention on the joint development of materials, and on optimum – and formal – interaction between the project partners. They organise regular discussions and meetings to look at progress being made with the project. It is important to take minutes of these meetings. These minutes should not only record the project process and resulting products, but also how the partners perceive and assess the results achieved hitherto. This aspect must certainly be given sufficient attention if minutes are kept for evaluation purposes. Otherwise, there is a chance that although the minutes will contain useful information, they will not adequately reflect the assessment of the results – something which is inherent in any evaluation. Drawing up minutes is less time-consuming than producing project descriptions, and minutes are, by their very nature, drawn up over the course of a project and not at the end of it. However, they are only really useful if they are well-structured and accurately indicate what has been said and, above all, what decisions have been taken.

4.1.3 Group discussions

A third way of carrying out evaluations is by means of group discussions, preferably both during and at the end of a project. It is important that all partners take part in such discussions. The most useful and profitable group discussions are when the participants meet in person. If this is not always possible, for example because such meetings place too heavy a burden on the project budget, the Internet can be used as an alternative. By exchanging views and commenting on each others’ standpoints via the net, a corpus of assessment and comment can be built up interactively step by step. Other possibilities are video or telephone conferences.

Group discussions can easily end up as informal, pleasant conversations which do not, however, meet their aim of providing an evaluation. Therefore, it is important for group discussions to be properly structured and to set out their terms of reference, not just before but also during the discussion. It is also important that opinions and ideas expressed are properly recorded so that this can be reliably reproduced for the “project evaluation”.

Group discussions offer several advantages. They can encourage involvement in a project, improve contacts between the project partners, and it can also be an enjoyable experience. On the other hand, there is always a risk that discussions will be dominated
by the most articulate and forceful individuals within the group and that some persons will not have (or be allowed) sufficient opportunity to express their views. In this connection, an external evaluator can help create a balance between the individuals in the group.

4.1.4 Individual interviews

Individual interviews are an effective means of shedding light on the views and ideas of specific partners. Interviews can best be used when only a small group of people can be expected to provide relevant information. Where the opinions of many people are involved, oral interviews within the framework of Leonardo projects are less worthwhile because they are very time-consuming. In these instances, a written questionnaire is probably the best way to collect data.

The best results are achieved by interviews which are well-prepared and -structured. There is a whole series of approaches, ranging from general guidelines for interviews to a clearly defined set of questions, with all kinds of variations between the two. General interview guidelines have the advantage that the interviewee has sufficient opportunity to express their opinion. A clearly defined set of questions makes for an efficient interview whose results are easier to compare with parallel interviews. It is also important in interviews based on a fixed set of questions that the interviewee be given the opportunity afterwards to give evaluations/assessments which they were unable to do during the interview itself.

As a rule, interviews offer up high-quality information. Compared with group discussions, they have the considerable advantage that there is also a place for each interviewee’s own observations. Individual interviews, and the appraisal of their results, is work-intensive and time-consuming, however. Interviews are a suitable tool if there is someone within a project group with interviewing skills and the ability to create the right atmosphere for a useful exchange of ideas. If no such person is available, the group should consider bringing in an outside expert. Another reason for calling in expertise from outside is that conflicts of interest within the group might prevent relevant information coming to light.

4.1.5 Written questionnaires

Aspects of Leonardo projects involving a larger number of individuals (e.g. 15 or more) can best be evaluated by means of a written questionnaire. Questionnaires may consist of open questions, closed questions (with a set of possible answers), or a combination of both. Open questions are generally more problematical; they are often too time-consuming for the persons filling in the questionnaire. This means that, for those setting the questions, a complex coding process must take place before the information collected can be analysed. Because of this type of problem, it is best to use a questionnaire with as many closed questions as possible, perhaps supplemented by one or more open questions so that certain other perspectives not covered by the closed questions can nevertheless be taken into consideration.

Compiling closed questions is far from easy. If the project partners have no experience of this, it is better for them to delegate the task to someone who knows how to construct questionnaires. If the partners nevertheless wish to draw up the questions themselves,
they must formulate questions which can be clearly interpreted and offer possible responses which are both exhaustive and mutually exclusive. In addition, only questions relevant to the subject concerned should be asked. The questions should also be tried out in test interviews before they are submitted to the whole target group.

Once the questionnaires have been filled in, the collected data must be analysed. If a relatively small number of questionnaires is involved (e.g. less than 20), replies can be counted manually. A larger number of questionnaires, or long questionnaires, must be analysed using a computer. The data must first be input and then analysed using a good statistics programme, such as SPSS.

One of the considerable advantages of questionnaires (which can also guarantee anonymity) is that they can be analysed relatively easily and efficiently. Furthermore, a large number of people can be approached, which means that a wide range of views can thus be obtained regarding important aspects of the project. The main problem is drawing up a high-quality set of questions. Non-experts often make the mistake of drawing up questions for which the replies have to be interpreted or are completely unreliable. This is why a trial run is so important.

4.1.6 Observations

By means of observations, it is possible to obtain first-hand, objective information on actual behaviour. If the aim of a project is to influence the behaviour of a target group, its degree of success can best be evaluated by observing that behaviour. Within the framework of Leonardo projects, it is recommended that behaviour be observed repeatedly in order to be able assess accurately whether the development of the project is still in line with its original objective.

The advantage of direct, systematic observation is that this allows a more accurate description of behaviour than is possible with a verbal or written account based on interviews or written questionnaires. If an interviewee says they enjoyed a particular course, one cannot know for certain whether is really the case. The interviewee may, after all, be giving the socially acceptable answer rather than their true opinion. Observation, however, is labour-intensive and time-consuming, and thus fairly expensive. Another point is that only visible behaviour can be determined, but not the reasons underlying it. These can be established only by means of additional questions, i.e. through a combination of observations and interview techniques. A further point is that observation in itself may influence the behaviour of those being observed. The chance of this happening is smaller if hidden cameras are used and/or participating observation whereby the observer combines this role with that of a participant in the project.

Observation can be standardised and structured by stipulating precisely in advance what is to be observed. Specific aspects of behaviour must be clearly determined in advance through a set of categories by means of which the observed behaviour can be described and later analysed. The observer can focus on various aspects, such as frequency, duration or intensity. The more the observations have been structured in advance, the greater the degree of efficiency when the data are then processed.
4.1.7 Tests

Tests are of relevance when newly developed materials or outcomes of training courses are to be evaluated. It is important to first of all determine what precisely is to be tested. Once this is clearly established, other questions have to be answered, such as: What should the test involve?; What criteria for success must be fulfilled?; Are further measures needed if the result of the test is negative?

Tests may take many different forms: a written examination, practical tests, discussions, work tasks, lessons or material which must be assessed as adequate or inadequate.

Although testing and evaluation are not precisely the same thing, they have important similarities. Tests are a method of assessment according to a yardstick, whereby a certain score has to be achieved in order to be successful. Evaluation may, but does not necessarily have to, make use of a yardstick. In an evaluation, a given situation or result is compared with an established standard, such as an expectation or an earlier situation.

4.2 Self evaluation or external evaluation

All evaluation methods described in this section can be implemented by the project partners themselves, or by means of an external evaluation (e.g. peer assessment, cross-evaluation of projects, or evaluation by outside observers). Of course, the best guarantee that a partnership will get objective evaluation results is if the assessment is delegated to independent outside assessors who are not biased either way as regards a project or its results. Using external assessors can be quite expensive, and the project coordinator and the partners must therefore take a clear decision whether or not an outside assessor should be called in. In taking such a decision, they should bear in mind the nature of the project, and should also take into account the project budget, which should not be earmarked for evaluation activities to a disproportionate degree.

If the budget is limited, self-evaluation is quite a good alternative to external evaluation, especially if one or more members of the project group are able to carry this out. Evaluation may even be the main task of one of the project partners. The best strategies to use when a project group opts for self-evaluation depends on a number of factors: which aspects a groups wishes to evaluate; the timing of the evaluation (ex ante, ongoing, ex post); whether the group attaches importance only to a general evaluation, or also to an ongoing assessment; the availability of persons able to draw conclusions from the evaluation; and the abilities of the project partners.
Plan planning tools for the evaluation: key questions

1. Which aspects will we evaluate, and when?
   Choose one or more aspects.

<table>
<thead>
<tr>
<th>Task package 1</th>
<th>Task package 2</th>
<th>Task package 3</th>
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<tbody>
<tr>
<td>200</td>
<td>feb</td>
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</table>

   **Aims of the project process**
   - management and structure of the project
   - the starting point for the project
   - the declared project aims
   - working methods used
   - feedback
   - newly developed products

   **Interim and final evaluation**
   - process
   - contribution by the project partners
   - interim and final products
   - European dimension
   - positive and negative spin-offs
   - project facilities

   **Impact of the project**
   - dissemination
   - impact on vocational training

   Questions 2 to 9 should be dealt with by aspect(s) as indicated in question 1.

2. What will the evaluation focus on in particular?
   Set out, preferably in collaboration with the partnership, the criteria underlying the evaluation.
   In evaluating a process, for example, consider criteria such as:
   - **Project management**: sufficiently democratic, inspiring, systematic, clear;
   - **Atmosphere within the group**;
   - **Contribution of the partners**: in accordance with planning, in the desired language, clear, fits within the overall concept, adequate level;
outcome of project phases: as planned, adapted to deal with obstacles, tie in well with each other, in logical order;

- collaboration on the project: smooth and efficient, mutually supportive, stimulating competition; varying interpretations because of different cultural and institutional backgrounds;

In an (interim and final) product evaluation, consider criteria such as:

- in line with objectives, geared to the target group: adequate level, can be used in a flexible way, relationship between theory and practice, well-designed, attractive media, student-friendly, teacher-friendly, price/quality ratio.

<table>
<thead>
<tr>
<th>Indicate evaluation criteria for each aspect</th>
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<tbody>
<tr>
<td>• criterion 1</td>
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<td>• criterion 6</td>
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<td>• criterion 7</td>
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</table>

3. To whom are evaluation questions being addressed?

- project manager
- project coordinator
- partnership overall
- parts of the partnership, namely:
  - monitoring committee, steering group
  - external experts
  - target group at which the product is aimed (excluding users)
  - users of the product

4. Which method is best suited to the questions involved?

- project descriptions
- reports of meetings
- group discussions
- individual interviews
- written questionnaires
- observations
- tests
- other:
5. Which questions are finally to be put, and to whom?

Consider general questions here (name, age, sex, function, employer, etc.), questions derived from the established evaluation criteria, possibly supplemented by one or more open questions.

- general questions
- questions derived from criteria
- open questions

6. Who is to carry out the evaluation?

- project manager
- project coordinator
- individual partners, namely:
  - steering group, monitoring committee
  - project partner with this specific task
  - external experts

7. By when do the data have to be collected?

8. How are we to report on the evaluation?

Example:
- brief description of the project;
- brief description of the evaluated aspect, including its place within the overall project;
- evaluation procedure used: scheduling, criteria, information sources, set of questions, data-collection methods, evaluators;
- outcomes from separate questions: quantitative, qualitative;
- summary and conclusions.

9. What is the nature of the following aspects which we must evaluate, and when should we begin? (see question 1)
Example of evaluation work from a Leonardo project proposal

In the Leonardo da Vinci projects which have been completed up to now, little or no attention has been paid to evaluation. There are no examples of evaluation activities from Leonardo projects which can be drawn on.

However, there is one single case of a project proposal dwelling on the question of evaluation:

- Partner C’s task is to evaluate the work undertaken in the course of the project. This involves the following:
  - keeping track of the work undertaken by the project partners by means of interviews and discussions – mainly by phone or using written questionnaires. This may relate to the product developed by the partners, or to the problems encountered when collaborating with outside partners, and the implications of this for the project;
  - keeping track of collaboration within the transnational partnership in order to evaluate the process of cross-border communication and cooperation; this is mainly done through attendance at meetings, followed by written questionnaires and, if necessary, visits to individual partners;
  - evaluating the effect of the partnership on the products that emerge. The most important point here is an assessment of the impact of a transnational partnership on the quality of the product and procedures developed by it. This is done by determining the procedures by which the partners regularly provide the evaluator with information, and by means of a systematic assessment of the work carried out. It may also involve feedback from users who are the primary beneficiaries of the project’s outcome. Their involvement should entail a preparatory test of the material concerned, and a follow-up interview;
  - a “customer satisfaction survey” at the end of the project in order to measure the extent to which users are happy with the results of the project.