



Gareth Long Project Management

*Evaluation and guidance services
for transnational projects in education*



Finalised Evaluation Strategy
and
First External Evaluation Report of
POOLS-2
Producing Open Learning System Tools-2
Transfer of Innovation LdV Project
(ES/09/LLP-LdV/TOI/149016)

Angelica Bucur-Marinescu and Gareth Long

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Introduction

A. Purpose of the report:

Evaluation and monitoring of the European Commission's Lifelong Learning Programme's project "POOLS-2" (Producing Open Learning System Tools2)

B. The main areas to be evaluated will be:

- The progress made towards the contractual outcomes and respect of the contractual work-plan
- The manner in which the partnership performs as a transnational collaboration (cross-cultural understanding, sharing of activities, effectiveness of communication, meeting deadlines, etc.,)
- The quality of the outcomes and products
- The extent of the inclusion of the target group (teachers at secondary schools and less directly, teachers in other subject areas) in project planning and activities
- The effectiveness and impact of dissemination activities and the extent to which the project has employed models of best practice from related projects
- The quality of the ODL and ICT elements of the project activities
- The extent to which a strategy for sustaining the project activities beyond the programme funding has been applied within the project
- The consistency of performance of the project as a Leonardo Transfer of Innovation initiative
- Advice and guidance on the financial and administrative progress of the project

The project external evaluator will participate in a minimum of two project meetings scheduled in the project.

C. Evaluation outcomes:

- i) **Draft evaluation strategy** for presentation at the project's first meeting
- ii) **Participation at first meeting** and one other meeting in agreement with project promoter
- iii) ***Finalised evaluation strategy and initial assessment report (within two months of the project's first meeting) : this document***
- iv) **Interim evaluation report** (produced one month in advance of the project's own Progress Report)
- v) **Final evaluation report** (produced one month in advance of the project's own Final Report)

1. Project synopsis

POOLS-2 Aims

The project addresses clear needs identified in the three countries to develop and increase the use of Information and Communications Technologies (ICT) for teaching of foreign languages and aim to transfer innovative European approaches to translate and customize courses and training methodologies for language teachers to help them develop and use e-learning materials and ICT in their classes.

The project **aims to promote and exploit Computer Assisted Language Learning (CALL) in Cyprus, Malta, and Portugal** based on **best practices and innovations from Pools Project** that received the **European Award for Innovation and Creativity in Lifelong Learning 2009**.

By transferring the results from POOLS to Cyprus, Malta and Portugal, the project Pools-2 aims to develop significant number of on-line materials that can be used for developing language lesson contents utilizing the advantages of eLearning and enabling teachers of the less-taught languages (and LWULs) to use ICT in their lessons.

POOLS focused on CALL and produced a course book, teacher courses, and DIY (Do It Yourself) videos on CALL materials development. To support teachers to use CALL, the project POOLS produced sample CALL materials for language students.

The Pools project produced originally 180 videos with transcriptions in nine languages, as free resources which can be used during teacher training courses as basis for developing exercises. These free on-line resources continued to be enriched by the Pools' wide network of members. The number of videos has doubled since the funded period, with a collection of videos available now also in iPod format.

The TOI consists in the transfer of the POOLS results by the following main activities:

- adapting and translating the core materials (course book, course manuals, and the DIY video subtitles),
- producing digital videos for use in CALL materials development in the three new languages,
- running sequences of teacher training courses on CALL.

Planned outputs / products / results as contracted in the Original application:

- 1) Updated Course Book: adaptation and translation of the Pools Course Book (original book had 59 pages)
- 2) Pools-2 Course Content Manual with guidelines for methodology and materials development (two guides, originally of 19 pages and 40 pages in Pools).
- 3) Videos suitable for eLearning: producing 20 videos by each of the partners from Cyprus, Malta and Portugal
- 4) CALL units/eLearning examples for the courses
- 5) Do-It-Yourself videos with subtitles
- 6) Pools-2 website and blog
- 7) Dissemination materials: brochures, flyers, eight newsletters, conferences materials, available in all the languages of Pools-2
- 8) Exploitation Report
- 9) Project management outputs: Partners' contracts, Quarterly Reports, Two Management Reports – Progress Report , Final Report, External Quality evaluation control
- 10) Quality Management outputs: 1st Year Quality Report, Year Quality Report, Meetings Reports and Minutes.
- 11) Final published versions of Course Book, Course Content Manual and eLearning Materials, in all the languages of the partnership DK, ES, GR, MT, PT, UK.

Partners:

The Pools-2 consortium brings together 8 institutions, 7 core partners from 7 EU countries and 1 associate (silent) partner from Switzerland:

P0: Confederación Española de Centros de Enseñanza (CECE) (ES)

P1: European forum of Technical and Vocational Education and Training (EFVET) (BE)

P2: EDEX - Educational Excellence Corporation Ltd – Intercollege (CY)

P3: South Danish Vocational College (SDE Denmark)

P4: Fondazzjoni Temi Zammit (FTZ) Malta

P5: University of Evora (Evora) Portugal

P6: Scotland's Gaelic College (SGC) UK

P7: Formation Universitaire A Distance Switzerland - Silent partner:

2. Sources of information and tools used for evaluation

The period covered by this evaluation report is November 1st, 2010 to February 15, 2010.

The external qualitative evaluation takes in account the available sources of information about the project, the internal QM tools and success criteria developed by the partnership, the changes that intervene during this period of time, the solutions implemented, in order to assess from an objective point of view the achievements and the correlation between the original objectives and outcomes.

The sources of information include among others:

- POOLS-2 original PM & QM plans, such as the monitoring procedures, schedule and milestones, internal evaluation procedures;
- Communication: the e-mail exchanges between the project's members and the exchanges with other projects, the communication relating to dissemination and exploitation ;
- POOLS-2 Kick-off meeting in Madrid: evaluation forms filled in by each participating partner, available also at http://www.languages.dk/archive/pools-2/meeting_and_schedule/January2010/Evaluation_forms_Madrid_meeting.pdf .
- Minutes of the Kick-off Meeting in Madrid

- Tasks planned and outputs and deliverables produced during this period, available to the partnership on the Pools-2 website part on <http://www.languages.dk/>

Tools/instruments used for external qualitative and quantitative evaluation

The external evaluation general strategy of Pools-2 was presented by one of the members of the external evaluation team, Ms. Angelica Bucur-Marinescu, at the Kick-off meeting in Madrid in January 2010. The general evaluation strategy was approved by the project's members.

This strategy is completed now by four evaluation tables. These tables were developed to enable a synthetic view of the main work phases (Project Management and QM, Development, Dissemination and Exploitation) and facilitate their evaluation.

In addition, the tools and instruments that are used by the external evaluators are presented for each of the work-phases and make the link between the following main aspects:

- Original application and contractual objectives, activities, outputs
- Pools-2 PM plan, QA procedures, internal evaluation of the project's meetings, activities and outcomes by project partners, quarterly reports
- Work-plan, reasons for changes, proposed and implemented solutions to cover the deviations from original work-plan
- The quality and relevance of the outcomes, taking in account the ToI aspects
- The impact on target-users and countries of the transfer of innovation.

3. POOLS-2 Evaluation

Preliminary remarks

The participants to the project Pools-2 found good solutions to overcome a difficult start due to the lateness with which the contract was signed by the Spanish National Agency, on December 14th 2009, two months and half after the official start of the project. The first financing was made available to the project only in February 2010.

This unusual situation occasioned a certain delay of some activities and on the participation of all the partners to the kick-off meeting of the project. In the completed evaluation forms prepared by the partners after the first meeting, there was reference to the regret that not all partners could attend the first meeting.

The Pools-2 original start was on October 1st 2009 as it was planned and approved by the Spanish National Agency previous to this date. Due to the circumstances described above, the project started in November 1st 2010, with a delay of one month. The kick-off meeting was postponed in January 2010, while waiting at least for the signed contract. It was impossible to delay it further if the project wanted to keep the initial work-plan with only a minor deviation of one month.

Remarkably, this delay is almost recovered at the beginning of February 2010 and we observed that the original planning and main milestones of main outputs were so far maintained as foreseen. The partnership is to be congratulated on achieving this momentum in difficult circumstances in the early phases.

The reason for the limited impact on the work plan was clearly a very motivated and professional consortium. Most of the partners decided to go on with the schedule as planned, to organize, participate or start the first activities and outcomes, instead of waiting for the signed contract and/or financing, such as the Spanish, Portuguese, Danish, Maltese partners and Swiss silent partner. Others, to participate to the activities that did not demand in advance financing, such as the partner from Cyprus whose internal regulations forbade to cover the travel costs to the meeting before receiving the signed contract, or the UK partner who was planned to be involved later on, in the second meeting.

The project's partners should be praised for their involvement, a pro-active attitude and good management of the delays that were occasioned by the Spanish National Agency.

Analyses of the project's results November 1st 2009 to February 15th 2010

Phase A - Project Management and Quality Management: (WP 1 & WP 2)

The PM and QM are analyzed from the point of view of ensuring the achievements, the collaboration among the partners, the evaluation and reporting.

The Pools-2 project benefits also from the transfer of best practices in project management and communication procedures from Pools. This and the good collaboration between the partners were key factors that ensured the achievement of the main planned activities and outcomes of the project during the first four months, from October 1st 2009 until the date of this report, in February 2010.

There is only one month of delay which the project feels can be rectified during the remaining period. The progress of the activities observed by the evaluators seems to point out that only one activity is an immediate challenge - the training of the Maltese and Cypriot teams that was planned during the Kick-off meeting. The Cypriot team could not participate because of the institutional regulations identified previously, whilst the Maltese representative who made the necessary travel arrangements became ill one day before the meeting and could not be replaced. The solution that was proposed and agreed was that the Danish partner will visit the two partners in Cyprus and Malta and train each of the two teams before March 2010.

This positive management of risk is a strong point of the project already and illustrates again the commitment of the partners and the individuals leading the partner organisation, to ensure the project is a success.

What is also important to emphasise again is that although the project was waiting for contractualisation to be complete, **several activities were begun in advance of the kick-off meeting**, taking advantage of the experience of the consortium.

This particularly was evident in the field of dissemination, where the **Pools-2 website and the blog**, essential tools for communication and awareness-raising activities, were **active on**

November 5th 2009. The web presence in particular is to be noted as it is a good example of how a project can exist and be represented clearly as a discrete independent initiative, whilst also illustrated as an activity that has clear links to others (the “POOLS family”) and is therefore one piece of a larger process that will achieve real impact and embed real change. The external evaluators were asked by the EACEA to present their ideas on project assessment at the Erasmus Project Co-ordinators’ meeting in February 2010 and the “POOLS” initiative was highlighted to an audience of approximately 150 co-ordinators as an example of good practice in this way.

With regard to internal evaluation and monitoring procedures, again a clear and effective start has taken place with key documents distributed and available on-line, such as the Pools-2 updated schedule, Quarterly report form, Time sheets, Meeting evaluation form, Overview of financial rules and reporting schedules, Kick-off workshop agenda and Evaluation form for the kick-off meeting.

The completed evaluation forms from the first meeting record a very positive experience, with only a small concern presented on a lack of time for discussion (as well as the disadvantage of not all partners being present because of the contractual delays and illness). It is positive to employ such a form and it is clear that it will be used for each meeting to monitor opinion throughout the project. However, there is the potential for some more detail to feature in this process. For example, it is very positive to include questions that both “look back” on the preparation for the meeting (“Partners were well prepared and had carried out their tasks as agreed for the meeting”) and “look forward” to what will happen in the period after the meeting (“After the meeting you have a clear vision of your upcoming work tasks”). Whilst this was the first meeting and whilst the responses to these were all positive (either 4 or 5) it would be interesting to include the potential for more comments to help discern the reason for a 4 for one aspect and a 5 for the other – more detail being encouraged here could assist in later periods of project work, especially in the more delivery-related work packages.

The management of the first project meeting appears to have been very effective.

The evaluation of the partners is available at http://www.languages.dk/archive/pools-2/meeting_and_schedule/January2010/Evaluation_forms_Madrid_meeting.pdf

There is a clear contribution from all **partners present: Denmark, Portugal, Spain** and the new **Swiss** partner. We noted that the partner from Malta overcame creatively the inability to participate due to sudden illness. She prepared in advance all the presentations (available now on the website [Powerpoint presentation from the Maltese team presenting use of Social Spaces in language teaching / learning](#)) and the other participants went through these slides together in Madrid. We also observed as good practice that participants to the meeting exchanged during this time updates and e-mails with the partners from **Cyprus and Malta**, which created a good collaboration and start. In addition, at the initiative of the Portuguese partner, a **Pools-2 Facebook** page was created, to which everybody subscribed, which contributed to the feeling of collective ownership.

The **Quality Management has been at the core of the project**. It was an issue discussed in-depth at the Kick-off meeting with a presentation of a feedback system by the teams for peer-review. The participants debated on how to implement the feedback system: ‘We decided that we always must react promptly with feedback whenever a partner has submitted materials. This can ensure better quality and that the outcomes represent / match the needs of all partner countries.’

The kick-off meeting was particularly productive in terms of contributing to ideas for dissemination and exploitation. These activities will be presented under Phase 2.

The PM and QM are also addressed in the website which presents the tasks for the next workshop in March 2010 of the three countries in which the transfer of innovation takes place.

Phase B Development 1 Adaptation & translation Pools outputs for use in Cyprus, Malta and Portugal

The project started the activities of the work-packages 6 and 7. WP6 deals with the adaptation and translation of POOLS Course Book for use in Cyprus, Malta, and Portugal and is led by the partner FTZ from Malta. The Maltese team proposed a very interesting updated unit on social spaces such as LinkedIn & Facebook and how such spaces could be used for language teaching and learning.

The Minutes from the Kick-off meeting shows that the PowerPoint presentation produced on this subject by the Maltese team “made a good basis for a debate on social spaces and inspired Ana from the Portuguese team to create a Facebook group dedicated to the Pools-2 project.”

The MT presentation is available on the project’s website:

http://www.languages.dk/archive/pools2/meeting_and_schedule/January2010/POOLS2presentationv2.ppt .

Therefore, as an **additional output**, the **Pools-2 Facebook** was created and updated.

This can have a positive impact on the dissemination activities.

The contribution to the development packages of the Portuguese team focused on the two manuals: methodology course manual and the materials development course manual. Already from the Kick-off meeting, the three participants from Portugal presented valuable proposals of the units to be used from the existing course materials that opened an interesting debate on possible use of subtitling tasks. Also, the use of Moodle (Modular Object-Oriented Dynamic Learning Environment and Open Source Course Management System) was demonstrated during the Kick-off meeting through the Portuguese Moodle platform

<http://moodle.dgfdc.min-edu.pt/course/index.php> .

The project advances on its specific development tasks and activities regarding the production of the new videos (20 videos are planned to be produced in Greek, Maltese, and Portuguese). The Danish representative, Kent Andersen made presentations in Madrid of videos realized by the Pools project and other videos that were added since, to demonstrate the different qualities that can be obtained. As written in the Kick-off Minutes with humour ‘it is clear that we do not need to match MGM, but we all would like to be able to produce videos like those from Scotland – by Gordon Well, that won the European Label’.

We noted a best practice applied for PM issues at the end of the Kick off meeting: each team prepared and presented a schedule with a list of milestones to be met by that team until next project meeting in March 2010. The schedule included the dissemination events or methods that will be implemented in the partner countries and internationally to ensure a cross country dissemination and impact on target-audiences.

We checked the achievement of most of the foreseen results and if these milestones had been respected. Most of the milestones agreed in Madrid by the partners were respected by mid-February 2010.

The Spanish coordinator succeeded to finalize two of the important tasks:

- Contract with National Agency
- Partner agreements

The other important task regarding the first payments to the partners is currently being implemented.

In addition, the Danish (SDE) deployed the following activities as planned:

- Update website with meeting results and content
- Compile meeting minutes
- Print Brochures in Danish, Greek, Maltese, and Spanish and put these online
- Contacts to partners by phone (CY and MT) with instructions and updates on achievements
- A minimum of weekly contacts with all teams (e-mail or phone)
- Input in project blog

The other DK activities in progress are

- Peer review the Maltese team in their work with a unit on social spaces
- Peer review the Maltese team in their work with updating the course book
- Peer review the Portuguese team in their work with selecting units for the course guide

These are very good results. **We note however that only the Danish and Portuguese partners published their planned milestones on the website. The other partners should do the same as the agreement and publishing of the partners' activities and tasks foreseen in the original application have a positive impact on their delivery.**

Phase C – Comments on this phase will be made once more activity has taken place – **the main consideration of the Development wps will be take place later – perhaps after the second meeting in Cyprus.**

Phase D – COMMUNICATION PLATFORM, DISSEMINATION, EXPLOITATION AND IMPACT OF RESULTS

The beginning of the activities and results of this phase were very good. The Pools-2 website is currently available with many features and transparent information and a blog. It is built on the platform that keeps together all the other 'Pools' projects and as such, benefits from an increased visibility and impact.

Pools-2 already produced an additional outcome related to the communication and dissemination activities, which is the Pools-2 Facebook available at <http://da-dk.facebook.com/pages/POOLS-2/406821910219>. It was developed during the Kick-off meeting, and it contains now photos and information about the activities of Pools-2. Pools-2 Facebook has now 77 fans, which is very good after only one month from the creation.

The Portuguese partners from the University of Evora tested other tools developed and used by the Pools projects, introduced by Kent Andersen in Madrid, to help Erasmus students to learn Portuguese. This is shown on <http://da-dk.facebook.com/pages/POOLS-2/406821910219> 'Erasmus students at University of Évora try out texblender and hypertext. They are trying to learn a traditional student's song in Portuguese. After watching and listening to the youtube video, they checked out the words that they did not know. After that, they had a crossword puzzle.'

The participants committed themselves to disseminate the project through other relevant activities, at national and European levels. The current other outcomes are the Newsletter 24 introducing Pools-2 sent to +500 persons and institutions, the Pools-2 brochure translated and available in print version or as download in Danish, English, Greek, Maltese, Portuguese, Spanish.

In conclusion, Pools-2 succeeded to advance well during the first four month and a half months of the project's duration, due to a motivated consortium working very well together to overcome the administrative problems encountered in order to maintain the pace of the work-progress and produce the first deliverables as planned.

Recommendations

Whilst the project is very self-aware of the need to recover some of the delays caused by late contractualisation, some aspects are presented here only for reasons of clarification and emphasis.

- 1) It is important for the Survey of the work-progress in Phases A (which is almost on schedule) and especially B (Development) with wps that started with a significant delay to proceed quickly. **Specifically, the project is recommended to pay particular attention to the following because of their early start dates:**
 - i) Phase A. **QM: Lead Partner ITE & CECE Start 01-10-2009** End 30-09-2011
- Analyses of internal Quality Management (QM) and Quality Assurance (QA) processes & results
 - ii) Phase B. **WP6: Adaptation and translation of POOLS Course Book.** Lead partner: FTZ Malta. **Start 01/11/2009** End 15/08/2011. To adapt and translate the contents of the POOLS guide book for use in Cyprus, Malta, and Portugal. Updated unit on social spaces LinkedIn & Facebook.
 - iii) **WP7 Course content manual** Lead partner: UnivEvora. **Start 01/10/2009** to 15/06/2010
 - iv) **WP10 Do It Yourself DVDs and Online videos** with subtitles in GR, MT, and PT. Lead partner: SDE DK **Start 15/10/2009** End 15/08/2010
- 2) The project is recommended to consider some more detailed questions, or the facility for more detailed responses, on the more progress-related questions of the internal (meeting-focused) evaluation form. This could be one element of a systematic ongoing process of monitoring internal project evaluation mechanisms (and evidenced in the Quarterly Quality reports?).
- 3) It is recommended that the partners from Cyprus, Malta and the UK (even though the UK role is foreseen more in later stages) to be encouraged to ensure that they are fully up to date with progress so far.

- 4) Whilst this is an early stage of the project, it is clear that there have already been some additional and unforeseen examples of added value and it is strongly recommended that these are recorded and presented – not only in the Progress and Final reports, but through continued and increased engagements with the sector.
- 5) Connected to 4) above, the project is advised to do this in the context of the project being a Transfer of Innovation initiative. Whilst ensuring first and foremost that the original contractual obligations are met, the project could start recording now the real added value taking place in the context especially of ToI (e.g. the additional “transfer” to social networking sites). This could also feature as part of a developing sustainability and exploitation strategy.
- 6) Whilst it is emphasised that the project needs to ensure an independent “life” for POOLS-2 is presented, it should not avoid references to synergies with POOLS-M and POOLS-T. Again, it is acknowledged that it is still early in the project lifetime, but most references to-date appear to lead from the original POOLS project. It would be interesting to see some draft plan for what and how, post the current projects, will be in place as the collective “legacy” from POOLS-2, POOLS-T and POOLS-M. Such a plan / model could be a very useful example tool for the funding agency to consider whilst plans for the next generation of transnational co-operation projects are being made.
- 7) This is not an issue at this moment, and the strength of the “POOLS” family of projects and the way it is presented on the web-site has already been emphasised, but it is important to maintain the specific and discrete role that POOLS-2 has in its own right. The web presence is good – but, should the project consider the specific requirements of the target groups for POOLS-2 compared to POOLS, POOLS-T and POOLS-M and ensure that a generic single approach is not taken only.
- 8) Connected to internal and external evaluation processes, user-feedback and any other survey work, the project should continue to adopt the process used by key project players in other projects of having a clear, transparent and documented system for recording feedback and planning responses to it.