ASSESSMENT SUMMARY - INTERIM REPORT

DATE 06/06/07

[to be completed only where both 'content' and 'financial' analyses have been fully completed and there are no outstanding demands to the promoter relating to additional information/documentation/clarification on the interim report i.e. colour ratings are agreed and final relating to both parts of the interim assessment]

Agreement number: UK/05/B/F/LA-162_355	Contracting period: 01/10/06-30/09/07	
Year : 2005 Country: UK	Project duration: 24 months	
Title: POOLS		
Contractor: Sabhal Mor Ostaig		
Contractor legal representative: Malcolm Robertson		
Period covered by the report	From: 01/10/05	To: 30 /09/06

ACTIVITIES ASSESSMENT		
Conclusion (Green, Orange, Red)	**(Green, Orange, Red)**	**Green**

Project management
The project activity after the monitoring visit (August 2006) has been marked by a very limited contact from the project manager resulting in late submission of the interim report (6 months after the original deadline). In addition, although the NA suggested several dates for monitoring calls to be held, there was only one monitoring call carried out (December 2006). The NA managed to contact the project manger on 23rd February and unfortunately learnt that he had been undergoing personal difficulties and that this might result in handing over the responsibility for managing the POOLS project to a different person within the contracting organization. Since this conversation there again had been no contact for several weeks. The NA sent a letter on 27 March explaining that that the failure of the contracting organization to fulfil its obligations under the agreement between Sabhal Mor Ostaig and the UK Leonardo National Agency might result in termination of the Agreement. A copy of this letter was also sent to all the partners, which resulted in eventual submission of the report in May 2007.

It is important to realize that at the visit in August 2006 the National Agency expressed their concerns as to whether the contractor will be able to submit the Interim report on time. In addition the visit report highlighted the fact that financial monitoring and record keeping is a weaker area of the project and encouraged the promoter to further develop and strengthen the system to monitor and record financial expenditure.

Although the process of submission of the Interim report had been very frustrating with minimal communication/input from the project manager, the NA is pleased that the partners have come together and through a concerted effort managed to submit the report. In the meantime the NA has been assured by the contractor representatives that appropriate measures will be taken in order to ensure effective management and continuation of the project. A Contract Amendment Request Form outlining the changes to the project manager will need to be submitted together with all the supporting documentation to the NA. This is an immediate action required by the project.

Although the project has undergone the above mentioned difficulties the report suggests that the management of the project has been appropriate to achieving its goals. The project has replaced its centralized coordination approach with a distributed one. This involves one or two partners assuming lead responsibility for monitoring and coordination of each task. The project reports that this has worked well – an assumption borne out by the fact that the project has stayed close to the work plan and managed to deliver most of the products to a high quality standard.

Partnership
There have been no changes to the initial partnership or redistribution of tasks. Although the purpose of the partner meetings is clear and they appear relevant to the progress of the project, not all seem to be partnership meetings as such. According to the workplan, by 30th September 2006 there should have been 5 meetings attended by all partners; in reality just two meetings were attended by all the partners. It should be noted, however, that the blog appears to be well used and a good way for partners to stay in touch and share new ideas and experiences.

Activities of each work package were largely implemented as planned. A small number of changes and alterations were identified by the project none of which had an adverse effect – all were positive changes. Most of the changes saw the project keeping up-to-date with technological advances – for example, making videos available in ipod format and setting up a blog. It is positive that in WP4 a target has now been set for the amount of videos to be produced per language as this provides a clear goal to work towards.

The project appears to be on track to achieve the activities planned for the remainder of the project. There has been some slippage however in completing the video materials although an extension has been agreed and should ensure that the materials are available in time for use in pilot courses.

Dissemination
Dissemination appears to be progressing well, utilising a range of channels (including some new avenues)

through the website, blogs, newsletters, brochures, face to face meetings, conferences and the EfVET network. It is positive that the project devotes a work package to this task. It is also positive that as part of the clustering activity similar projects will be invited to the final conference to aid dissemination. The project appears to be reaching appropriate audiences through its work although more detail would be beneficial here. For the Final report the project should ensure they can provide details to show that relevant target groups and stakeholders were reached through these activities. Although a lot of work is going on, it is noted that some partners appear to be more heavily involved in dissemination activities than others – all partners should ensure they play an active role in dissemination activities. Overall the dissemination work appears to be well underway but there is need to continue and grow in momentum as the project draws towards September 2007.

Results
The project is on its way to achieve the products as contractually agreed on time. The website is complete and is available in English as originally envisaged. The website reflects current developments in the sector, is well designed, attractive and easy to navigate. It appears to be regularly updated. It is excellent that users themselves can contribute materials and tips to the site.
Although the Development Course Manual is not yet complete it looks promising and sets out a scenario for delivering the course and a number of modules, each containing a short description, pre-requisites, what competencies can be achieved, estimated time, delivery method and links to relevant existing materials to help teachers research the module and develop it. The Methodology Manual follows a similar format.
An excellent range of learning materials is available in the Digital Pools in each of the partner languages. However, as recommended in the visit report, it would be useful to see some further signposting in particular, it would be useful to be able to navigate to resources relating to the target sectors (electronics, catering and tourism, health care and media studies).
The course book appears comprehensive and reflects developments in the sector such as the growth of podcasts. It offers a kind of 'glossary' describing the range of computer assisted language learning options for teachers to draw upon and be inspired by.
The Do It Yourself videos are user-friendly and easy to download and play. They provide clear step by step instructions allowing the user to watch as the demonstrator clicks through different screens and uses various software and approaches. The Gap Analyses for Lithuania and Romania are both available online as envisaged and appear informative and well-presented. Project brochures in planned languages are also 100 % complete.
All other materials appear to be progressing well although there is translation work is still to be completed to ensure all materials are available in the languages originally envisaged.
The project is working with the target languages agreed in the work packages, however, more detail on method and didactical approach would be appreciated as this is only briefly described.

Monitoring and Evaluation
In terms of monitoring, the website includes a blog to monitor progress and enable evaluation by users who can clearly see the process behind the development of the project. Other means of monitoring mentioned at the monitoring visit include regular communication amongst partners (via emails, phone calls and teleconferences), transnational meetings/workshops – review of each workpackage and reporting by each partner on progress made (recorded in minutes) and peer review framework – each partner responsible for monitoring other partner's progress. It is very important that the new project manager maintains a regular contact with all the partners and ensures progress is reported back to the National Agency.

Currently, most products are subject to the same form of evaluation – a check against milestones at partner meetings as well as peer reviewers who comment on each task and suggest changes. In the Interim report it has been stated that there was an open evaluation system online but that this became a target for spam. The project appears to be very open to user feedback and comments on materials and resources, inviting users to send their comments and fill in evaluation forms. User feedback has been used to change things for the better (e.g. implementing an RSS system). However, perhaps the process need to be further formalised – at present, users can click on a link which takes them to a word document evaluation form. Perhaps a more direct method could be used in the form of a pop-up evaluation form which is less easily ignored.

The visit report pointed out that the financial monitoring and record keeping is a weaker area of the project. At the time of the visit no information was available in regards to partners' financial spent.

The financial part of the interim report was, however, completed to a high standard which suggests that the contractor has put a good system in place to monitor and record financial expenditure.

It is important to reiterate that up-to-date records of financial expenditure are crucial not only for the Interim and Final reporting stages of the project life cycle but also for ensuring that overall quality of project management and monitoring is maintained. The NA further strongly recommends the Contractor closely monitors financial spent of the whole project.

Innovation

The project has developed a new collaborative method to respond to the existing lack of eLearning materials available in less widely used and taught languages. All materials developed are Copyleft, allowing them to be redistributed and modified by teachers. Also, the project builds the capacity of teachers to develop their own materials in response to the gap. The website is also inclusive and encourages collaboration with opportunities for teachers to submit their own materials for others to use, transparent dialogue (through the blog) and opportunities for feedback. Overall, the project makes excellent use of technology. In addition, the project places emphasis on clustering with other projects to achieve maximum impact on existing problems.

Strengths
- A strong partnership with clear channels of communication and opportunities for transparent dialogue.
- Work packages have been implemented as planned and are progressing well.
- The project makes excellent use of technology. The blog is a particular strength offering partners the tools to stay in touch and share new ideas and discoveries. It also helps in making the whole process transparent for users.
- The products created so far are to a high standard making good use of technology and communicating new ideas and skills in a clear and accessible manner.
- The project is very open to user feedback
- The project takes an innovative approach to addressing gaps in Elearning materials – building the capacity of teachers themselves to modify, distribute and use existing materials as well as to develop their own materials.

Weaknesses
- Lack of communication from the project manager resulting in minimal communication with the NA, late submission of interim report, ultimately putting the project at risk of closure
- Some partners appear to be more involved in dissemination than others.
- Some meetings of the partnership were less well attended.
- The report lacks detail in respect of describing didactical approach and method – this is a missed opportunity to 'sell' the work of the project.
- A lack of signposting to aid navigation through Digital Pools for people searching for sector specific material.
- Lack of detail as to who was reached through dissemination activities.

FINANCIAL ASSESSMENT		
Conclusion (Green, Orange, Red)	**(Green, Orange, Red)**	**Green**

CONSOLIDATED RATE		
Final Conclusion (Green, Orange, Red)	**(Green, Orange, Red)**	**Green**

ACTION TO BE TAKEN RELATING TO THE SECOND PROJECT PERIOD & SUBMISSION OF THE FINAL REPORT

- Contractor to submit CARF (and other supporting documentation) regarding the change of project manager by 15 June
- **Contractor to ensure smooth and effective management and delivery of the project by an experience and committed project manager, ensuring all the contractual requirements are met (including submission of reports, keeping regular contact with the NA and carrying monitoring calls)**
- Ensure that good work in dissemination is built upon and 'stepped up' on the part of all partners as the project approaches September 2007.
- Ensure that all partners are able to attend partnership meetings.
- Ensure that details can be provided as to who was reached through dissemination activities.
- Consider improving signposting for people searching for sector specific materials within the Digital Pools.
- Consider further, perhaps more formal (external), means of evaluating products.
- Contractor to closely monitor financial spent of the whole project
- Partners are encouraged to submit financial information together with relevant evidence (timesheets, invoices, receipts, boarding passes etc.) on a regular basis. It is recommended the expenditure is recorded in the format of final reporting financial tables.
- Project representative responsible for finances to attend the Final Report seminar on 12 July
- Please refer to the comments on the attached copies of the financial tables.

PAYMENT RECOMMENDATION

Immediate second payment proposed:	**119,907.60 EUR**
Not yet eligible for second (70% rule)	☐
Delayed second payment proposed *(please comment further below)*:	☐
[Further detail all or any reasons for delay in payment beyond the Interim Assessment stage, to include a recommended payment date]	