:D-facto
accesibility and *emotion*

D-FACTO Assesment Methodology

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EXECUTIVE SUMMARY

It aims to provide an accurate assessment of the project for partners and the European Commission.

The main aims are:

- Identification and selection of participants in the validation to evaluate them. The partners will assess the characteristics of potential participants to select those that best meet the selection criteria.
- Collecting the evaluation sheets by representatives of the direct target.
- Conducting interviews with representatives of target audience who participated in the validation.
- Analysis of the assessment sheets and interview results.
- Conducting an assessment report including recommendations for improvements.
- Carrying out the improvements indicated in the evaluation report to adjust the D-FACTO to the real needs of target audiences.

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1 PURPOSE OF THE REPORT

The purpose of the Internal Evaluation/validation is the systematic collection of information about the project that enables stakeholders to better understand the program, improve its effectiveness, and/or make decisions about future programming.

An <u>Internal Evaluation</u> reflects on whether the project's processes (such as management and monitoring systems, partnership and implementation procedures, etc) are effective and if not, how they might be improved, as well as, on whether the achieved goals and completed deliverables meet the stakeholders' expectations. Internal Evaluation has mainly an "internal" character, as it is developed internally and the results are mainly for "internal" use. That means that the evaluation is conducted by one or several partners of the consortium and the results are to be used by the partners of the project to improve any issues that might have come up and caused problems to the implementation, time schedule, budget or outcomes of the project.

The Internal Evaluation/ Validation is conducted to:

√ Facilitate management's overall perception of the project's progress, including its goals, how it meets it goals and how it will know if it has met its goals or not;

√ Produce data or verify results that can be used for dissemination and promoting services in the community;

√ Produce valid comparisons between work packages and their outcomes;

√ Fully examine and describe effective practices for duplication elsewhere;

√ Identify any delays in the time schedule;

√ Identify any problems in the management of the budget;

√ Record any delays in the deliverables submission.

2 BACKGROUNG

The aim of Leonardo da Vinci Multilateral Projects 'Transfer of Innovation' is to improve the quality and attractiveness of the European VET system by adapting and integrating innovative content or results from previous Leonardo da Vinci Projects, or from other innovative projects into public and/or private vocational training systems and companies at the national, local, regional, or sectoral level.

The process for transferring innovative training content or results includes the following:

- Identifying and analysing targeted user requirements
- Selecting and analysing innovative content to meet these requirements and analysing the feasibility of transfer
- Integrating (or certifying) it in European, national, regional, local and/or sectoral training systems and practices.

This implies:

- Adapting it to the training systems, culture, needs and requirements of targeted users (updating the product, etc.)
- Transferring it to new socio-cultural and linguistic contexts
- Using it in new sectors or new target groups, including piloting it in public or private training structures

2.1 Project Description

D-facto facilitates the integration of aspects of emotional and accessible design into the products and services of European SMEs. This is realized by providing the engineers designers and R&D staff, i.e. those involved in the processes of conceptualization and design of products and services, with the competences and skills to integrate emotional and/or accessible design principles into these products and services. D-facto will provide them with a self-learning platform, which will integrate learning contents in the field of emotional and accessible design and will provide access to tools, case studies and relevant complementary information.

The project is based upon the transfer of the results of several innovative projects and materials of the members of the consortium. These materials, experiences and results will form the basis for transfer and will be adapted and/or integrated into the learning platform. On the basis of a needs analysis the contents of the learning system as well as the technical requisites will be defined, and materials adapted. In the case specific gaps are identified with respect to the existing materials new complementary materials will be developed. The system will be tested with representatives of the target public so as to validate the results.
D-facto is addressing the need to incorporate professional firms with expertise in the field of emotional and accessible design, as these skills are increasingly in demand in the labour market. These provide all professionals involved in the process of conception and design of a new product or service, ie. designers, engineers and staff from the departments of R & D skills to design a product or service from the terms of emotional response and accessibility needs of the consumer or end user.
The project combines different methodologies to collect information, materials and data.

1.   Data-mining: gathering, selecting and treating information to transform it into knowledge.
2.   Questionnaires or standardized forms as they are quantifiable.
3.   In-depth interviewing with key actors to obtain contextualized information that allows a correct interpretation of quantifiable data.

In this way, the methodological approach on which D-facto is based combines self-checking and self-evaluation templates at several levels in a self-learning system on a technological platform, allowing users to chose different materials depending on their evaluations and needs. For example, templates for collecting personnel information, sets of "standard" questions in an executive coaching interview, use of different (cognitive or systemic) assistance techniques or the use of efficiency and efficacy templates in people management.

Once the system is developed, it will be evaluated and validated by representatives of the target public, developing a validation and evaluation methodology and fieldwork in order to obtain the results of the evaluation. These results will indicate the improvements that must be made to the self-learning system, both in its technological components and in its contents. These improvements will be implemented in the system in order to fully adapt it to the needs of the target public.

The appraisal will be carried out from the beginning, while simultaneously designing awareness and diffusion tools to present to recipients and potential users the opportunities and advantages, both professional and personal that can be offered by the products and results of D-facto Activities will be carried out to raise awareness about the advantages of using executive coaching to improve people management, as well as activities to highlight results in which the D-facto system is the key component.

Consortium

The promoter CETIEX, is a private technological center in Extremadura that born with a clear vocation at regional and national level.
It is an horizontal center, and its main objective is to realize activities of research and technological development and technological services to SMEs, particularly in the improvements and industrial production area.

The consortium combines the participation of SME support organizations from different EU countries (FUNDECYT, KRIC, The University of Nottingham), as well as SME representatives or SMEs: X-Panel Ltd, XLAB, INNOVATE.

Results and Impact[1]

D-Facto Project aims at improving the competeveness of the SMEs giving an answer to their needs in a constantly demanding market for innovative products and services. There are many tools used to enhance competitiveness and one good example that is currently in use is benchmarking. This allows people to copy best-practice however, as this research has shown, the market is becoming too dynamic to simply spread good practice from one organisation to the next. Extended products or the design of meaningful

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[1] From the Methodological Framework by Kathryn Cormican and Maebh Coleman

customer experiences, are not based on previous processes but based on smart and demanding customers.

The main beneficiaries of the project are:

- Industrial designers
- Industrial engineers
- Interior designers
- Anybody who wants to create something

As Pine & Gilmore (2004) point out, if your brand is a commoditised industry, an engaging experience might be the only way to expose customers to your offering. The basis of success will be to understand the customer's aspirations and guide them to fully realising those aspirations (Pine and Gilmore, 1999) through effective use of emotional and accessible design principles.

Taking into account project researchs about emotional design, the project final impact would be:

- To improve the level of awareness in Design for Accessibility and Emotion in European SMEs
- To optimise knowledge, competencies and skills relating to emotional and accessible design in European SMEs
- To synthesise guidelines, methodologies, tools and checklists for Design for Accessibility and Emotion
- To equip designers with some initial and basic knowledge and skills regarding Design for Accessibility and Emotion
- To encourage people and companies to think differently and laterally

2.2 Workplan Description

WP number:	1		
WP title:	PROJECT MANAGEMENT		
Start date:	01/10/2009	End date:	01/10/2011
WP Leader:	FUNDECYT		

Aims of work package:

Creation of a management, coordination and evaluation system that guarantees the effective progress of the project and the fulfilment of fixed goals in the set terms, taking advantage of new technologies in order to increase the management quality and efficiency as well as monitoring indicators for the evaluation of management quality.

2.2.1 Description of activities:

T1.1: Consortium agreement elaboration and signature

T1.2: Creation of a simple Procedure and Management manual to describe all the management processes.

The Procedure and Management manual describes the management processes, and includes the description of a series of measurement indicators (based on EFQM) to be applied in everyday work. It includes a detailed description of the project tasks and WPs, a description of the proposed WP coordinators as well as the components of each WP; detailed budget, methods of communication, who's who. The manual also describes the monitoring and evaluation system. This manual will be an integral part in the consortium agreement.

T1.3: Creation of the project management system, including the on-line management tool. The on-line project management tool consists of a work area with restricted access that allows the WPs to work together from a distance on documents and materials that will be developed in the framework of the project. The on-line management tool will allow constant and real-time project monitoring: every report, activity, meeting, etc. will be incorporated into this tool.

T1.4: Daily management and coordination of the project according to established processes. The Foundation for the Development of Science and Technology in Extremadura (FUNDECYT) will be the general coordinator and will assume the project management responsibility. To do this, this foundation will use its broad experience in coordination of European projects. A work and communication plan will be initially established, with the creation of communication channels between partners, software homogenisation, file transfer systems, etc.

Description of methodological/pedagogic framework (if applicable)
2.2.2

A series of indicators will be established to measure the work evaluation and the degree of achievement of the expected results.

The measurement is established according to EFQM indicators, descriptive and global model of evaluation and training of quality in management, which gathers the set of factors that concern management and the relations involved in order to orientate them towards the excellence.

Different indicators are combined:

- Fulfilment indicators: taking into account that fulfilling is related to a task conclusion. Fulfilment indicators are related to ratios that indicate the achievement degree of tasks and/or duties. Time spent on task fulfilment, minimum number of participants in the evaluation, etc. will be measured here.

- Evaluation indicators: related to the ratios and/or methods that help in performance identification and improvement opportunities for tasks, processes or work packages. Some examples include the quantitative and qualitative results obtained in the validation and evaluation phase, or the internal communication indicators.

- Efficiency indicators: related to the ratios that indicate the invested time for the fulfilment of tasks and/or duties. Some examples include the use of resources in different work packages, the incurred costs in management, etc.

- Efficacy indicators: related to the ratios that indicate capacity or success in the fulfilment of tasks and/or duties, such as the percentages of tasks accomplished at any moment or the evaluation of WP product quality.

- Management indicators: related to management and/or establishment of concrete actions to realize the planned and programmed tasks and/or duties. They are related to the ratios that allow the real management of a process, like the ratios of the project management tool use, the quality of communication between the general coordinator and WP coordinators.

Expected results to which this WP contributes			
No.		**Description of the results**	- MANAGEMENT, MONITORING AND EVALUATION SYSTEM IN THE TECHNICAL, ADMINISTRATIVE AND FINANCIAL FIELD - INTERNAL COMMUNICATION SYSTEM FOR THE PROJECT - ON-LINE PROJECT MANAGEMENT TOOL - CONSORTIUM AGREEMENT AND PROCEDURE AND MANAGEMENT MANUAL IN SHORT, A MANAGEMENT SYSTEM THAT GUARANTEES THE ACCOMPLISHMENT OF THE RAISED AIMS, WITH THE EXPECTED QUALITY AND THE BEST EFFICIENCY.

Assesment Methodology

WP number:	2		
WP title:	METHODOLOGICAL FRAMEWORK		
Start date:	01/10/2009	End date:	01/03/2010
2.2.3 WP Leader:	Innovate		

Aims of WP:
The objective is to establish a framework to carry out the knowledge of the needs, the mapping (creating a map on emotional and/or accessible design training materials), and subsequent materials treatment. The analytic framework will describe in detail the methodology to be followed in every step of the analysis, mapping and treatment, setting the bases for all the subsequent WPs in the project.

2.2.4   Description of activities:
T2.1 Creation of the methodological framework that describes how to implement next steps of the project. II will include: – Definition of analysis methodology, always taking into account the final goal of this phase. – Development of analysis tools: questionnaires/interview outlines, etc. – Development of the methodology to be followed for the creation of the report. – Establishment of selection criteria for the analysis sample. **T2.2. Development of tools for fieldwork.** For example, questionnaires, interviews, manuals, etc.

Description of methodological/pedagogic framework (if applicable) 2.2.5
The methodological framework is developed in three stages: in the first meeting of its Steering Committee, Innovate presents a first approximation to the structure; the first draft is presented once T2.1 is finished. A final draft is developed and after performing the tool test it is presented to the Committee for approval (each stage must be approved before going on to the next one).

Expected results to which this work package contributes			
No.	1	**Description of the results**	THE RESULT IS THE METHODOLOGICAL FRAMEWORK THAT DESCRIBES THE WORK CONTEXT IN THE NEXT WPs, THE PROCESSES TO BE CARRIED OUT FOR THE PERFORMANCE OF THE ACTIVITIES DESCRIBED IN THOSE WPs, AND IT ELABORATES THE TOOLS TO BE USED IN THE NEXT STAGES QUESTIONNAIRES, DIALOG MANUALS, INTERVIEW OUTLINES, ETC.

Assesment Methodology

WP number:	3		
WP title:	ANALYSIS OF NEEDS		
Start date:	01/03/2010	**End date:**	30/05/2010
2.2.6 WP Leader:	XPANEL		

Aims of WP:
Identification of needs as well as knowledge and training of engineers designers and R&D staff, involved in the processes of conceptualisation and design of products and services, related to integrate emotional and/or accessible design principles into these products and services.

2.2.7   Description of activities:
T3.1 Field work: achievement of skills, barriers and needs analysis of the participating regions/countries, applying the methodological framework developed in the previous phase.

T3.2: Analysis of the Results:

Collection, research and analysis of the results obtained at the field work.

T3.3: Elaboration of conclusions of the analysis of needs phase, Each partner must elaborate a report on the regional context which the describes the current situation in each of the participating regions and conclusions on the needs which will form the basis for the self-learning system D-FACTO The report will be based on two types of analysis:

1. Quantitative analysis: implementation of ratio and percentage calculation systems that allow a comparative analysis among participating regions, as well as holistic analysis to each project.

2. Qualitative analysis: analysis of regional contexts in order to detect differences in the results of fieldwork originating from the regional situation, that must be taken into account when elaborating |

Description of methodological/pedagogic framework (if applicable) 2.2.8
If the sample is representative in the characteristics of included recipients and users, and if it is statistically significant, it is then assessed.

The assessment is carried out through the sample classification according to typology and precedence as established in the methodological framework.

The validity of administered questionnaires is also evaluated (completed data, incidences, etc.).

From the report, suggestions and instructions are evaluated:

• Validity

• Relevance

This assessment is carried out through the contrasting of results raised in the documentation and bibliography collected in WP2 and reflected in the methodological framework by members belonging to WP before elaborating the final report. |

Expected results to which this WP contributes			
No.	1	**Description of the results**	CONDUCTION OF THE FIELD WORK IN THE 6 PARTICIPATING COUNTRIES, OBTAINING AS A RESULT A REPORT THAT DESCRIBES: THE SAMPLE, NUMBER OF VALID QUESTIONNAIRES/DIALOGUES, INCIDENCES AND QUANTITATIVE AND QUALITATIVE ANALYSIS OF THE RESULTS OBTAINED.

WP number:	4		
WP title:	LEARNING SYSTEM DEFINITION		
Start date:	01/04/2010	**End date:**	31/07/2010
2.2.9 WP Leader:	KAUNAS		

2.2.10 Aims of WP:
The aim of this WP is define our D-FACTO learning system. Once established the methodological framework and the Analysis of needs, we have to define the contents and the support tools. To explore different materials and contents regarding emotional and accesible design into the products and services of European SMEs techniques, identifying those which are potentially more adequate and useful for SMEs, based on criteria established in the methodological framework (WP2) and the analysis phase results. Input materials contributed by partners, as well as those generated in all partner projects and activities will have vital importance in this exercise. Contents and materials will be adapted based on the needs of the self-learning system. The adaptation may consist of a simple matter of writing for an ICT environment (that of the self-learning system) or the adaptation of the contents to specific needs of SMEs identified in the analysis (WP3).

2.2.11 Description of activities:
T4.1:Learning system definition with minimum training content to include in the knowledge base of the learning modules. **T4.2: Learning system Definition** of support contents and materials.

Description of methodological/pedagogic framework (if applicable) *2.2.12*
The metadata standard proposal is presented to Management Committee for approval, and then a sample of the materials is applied in order to refine the standard to a maximum to the characteristics of these materials characteristics. The final standard will be approved by the Management Committee, in doing so an expert opinion will be demanded from the experts in creativity who belong to the partner organisations. The main bases of the map are the results and materials provided by the partners and projects financed with regional, national and European funds, guaranteeing their quality. The own materials brought forward and the external identified materials will be evaluated by the experts in creativity and innovation belonging to the different members of the consortium.

Expected results to which this WP contributes			
No.	1	**Description of the results**	A MAP OF MATERIALS AND CONTENTS REGARDING INFORMATION, KNOWLEDGE AND TRAINING IN THE FIELD OF INTO THE PRODUCTS AND SERVICES OF EUROPEAN SMES. THE INFORMATION, KNOWLEDGE AND TRAINING MATERIALS AND CONTENTS ARE PROVIDED BY: - MATERIALS PROVIDED BY PARTNERS, - REGIONAL, NATIONAL AND EUROPEAN PROJECTS OF PARTNERS, - MATERIALS BELONGING TO PARTNERS, - EXTERNAL MATERIALS OF INTEREST (T4.2).

WP number:	5		
WP title:	DEVELOPMENT OF LEARNING CONTENTS		
Start date:	01/07/2010	End date:	31/01/2011
2.2.13 WP Leader:	CETIEX		

Aims of WP:
The aim of this WP is to define the learning contents included in the D-FACTO system, trough the adaptation and treatment of the contents and materials related emotional and accessible design into the products and services techniques identified at WP 4. The identified materials and contents will be adapted to the requisites of the self learning system. The adaptation can be merely editing for an ICT based environment or in adapting the content to the specific needs of the SMEs, identified in WP3.

2.2.14 Description of activities:
T5.1: Transfer and adaptation of the learning contents: identification and first classification of regional, national and Europeans learning materials and contents belonging to the project partners and a identification and classification of others training materials available and potentially to be included in the knowledge base, based on the results of the previous phase (PT4) and taking into account the indications of the methodological framework (PT2) and the analysis results (PT3).   **T5.2: Development of new contents:** Development of new contents that may be provided by the knowledge and experience of the partners

Description of methodological/pedagogic framework (if applicable)   *2.2.15*
The methodological framework developed in WP2 is the basis on which the identification and decision is made regarding support materials and contents to be developed in this phase. Analysis results indicate one of the main factors of this decision, and the mappping exercise provides the source from which support materials will be selected.

Expected results to which this WP contributes			
No.	1	**Description of the results**	A SET OF TRAINING MATERIALS AND CONTENTS ON ACCESSIBLE AND EMOTIONAL DESIGN TECHNIQUES INTO PRODUCTS AND SERVICES CLASSIFIED USING A UNIFIED STANDARD AND CATEGORIZED BY SECTOR, CONTEXT, ETC. WITH THE DESCRIPTION OF EACH TECHNIQUE. THIS RESULT REVEALS THE WAY IN WHICH JOINS THE MATERIALS ON THE KNOWLEDGE BASE.

WP number:	6		
WP title:	DEVELOPMENT OF SUPPORT CONTENTS		
Start date:	01/11/2010	End date:	01/03/2011
2.2.16 WP Leader:	INNOVATE		

Aims of WP:

The aim of this WP is to define the contents of the support system that must support the D-FACTO system, through the treatment of the tools and support contents that can provide effectiveness and interact to the learning system, such techniques as "storytelling" related to accessible and / or emotional design techniques into products or services that have been identified in phase WP4 - Definition Content Support System. It will adapt the content and materials identified in the learning system requirements. As in the WP5, learning content development, adaptation may consist of merely adapting to an environment drafting ICT or adaptation of content to specific user needs identified in the analysis (WP3).

2.2.17 Description of activities:

T6.1: Transfer and adaptation: Treatment and adapting materials and content for self-learning system, including the development of content for the support system that is integral to the self-learning system.

T6.2: Development of support contents consisting of "storytelling" techniques, containing real experiences associated with accessible and / or emotional design that help users as support material.

T6.3: "Tools and techniques" development of new tools and support techniques as needed in the WP3 and defined in the WP4.

Description of methodological/pedagogic framework (if applicable)
2.2.18

The methodological framework developed in WP2 is the basis on which the identification and decision is made regarding support materials and contents to be developed in this phase. Analysis results indicate one of the main factors of this decision, and the mappping exercise provides the source from which support materials will be selected

Expected results to which this WP contributes

No.	1	Description of the results	CONTENT TRAINING. CASE STUDIES COLLECTION METHODOLOGY "STORYTELLING". DESCRIPTIONS OF LEARNING EXPERIENCES. OF MATERIALS DEMAND ARE, ACCORDING TO A STANDARD FORMAT, THE DESCRIPTION OF THE EXPERIENCE OF A TRAINER / TEACHER TO THESE MATERIALS, AS WELL AS THE DESCRIPTION OF THE EXPERIENCE OF A PARTICIPANT IN THE LEARNING WITH ORDER TO CONTEXTUALIZE.

WP number:	7		
WP title:	DEVELOPMENT OF SYSTEM PROGRAMMING		
Start date:	01/02/2011	End date:	01/09/2011
2.2.19 WP Leader:	XLAB		

Aims of WP:
Creation of the self-learning system, which consists of:

1. The knowledge base, that will allow a friendly, fast and easy access to materials and contents about emotional and accesible design into the products and services of European SMEs.

2. A "storytelling" with real experiences.

3. Training area with different useful contents and tools for emotional and accesible design, as well as any other topic related to the object of the project.

4. Support tools as forums, FAQs, manuals for system use and any other tool that users consider necessary (WP3) will be developed and incorporated.

2.2.20   Description of activities:

T7.1: Description of technical requirements of the self-learning system D-DACTO, taking into account the resulting suggestions of WP3.

T7.2: Programming of the self-learning system D-FACTO in 2 phases. First, a prototype is developed to be tested by partners; subsequently a beta phase is developed to be validated in WP8. Validation by partners focuses primarily on the identification of possible bugs and secondarily on the ease of navigation and friendliness.

Description of methodological/pedagogic framework (if applicable)
2.2.21

XLAB development rules are applied and recognized as good practice by Slovene authority. The development consists of 4 main phases:

- Requirements presentation (that must be approved by the Steering Committee);

- Prototype to which a pre-test is done;

- Beta version for validation by users; and

- The definitive version incorporating the improvements.

Expected results to which this WP contributes

No.	1	Description of the results	BETA VERSION AND LATER FINAL VERSION OF THE D-FACTO SELF-LEARNING SYSTEM. THIS SYSTEM WILL BE EASY TO USE, FRIENDLY AND ACCESSIBLE FOR RECIPIENTS AND USERS, INCLUDING A SELF-DIAGNOSTIC TOOL (WHICH GUIDES USERS THROUGH PROPER MATERIALS), A TRAINING AREA AND A SUPPORT SYSTEM. THE KNOWLEDGE BASE WILL INCLUDE ALL MATERIALS CLASSIFIED IN WP5 AND WP6, AND IT WILL ALLOW THE ACCESS TO AN INFORMATION, KNOWLEDGE AND TRAINING SOURCE REGARDING THE EXECUTIVE COACHING, MANAGEMENT TECHNIQUES AND PEOPLE DEVELOPMENT.

WP number:	8		
WP title:	VALIDATION AND TESTING		
Start date:	01/04/2011	**End date:**	01/07/2011
2.2.22 WP Leader:	NOTTINGHAM		

Aims of WP:
Testing and validation of the self-learning system D-FACTO with the knowledge base, its self-diagnostic tool, the training area and support services by representatives of immediate recipients and potential users. The goal is to detect faults and possible improvements in the materials, contents, tools and support system. The aim of this WP is also to correct detected deficiencies and incorporate the indicated improvements. The assessment and validation allow content improvement of the self-learning system as well as the functionality and friendliness of the system itself, as it assesses its implementation.

2.2.23 Description of activities:
T8.1 Design of the validation and assessment methodology, including the development of the evaluation manual and tools used. - Development of assessment cards and interview outlines with representatives of the target public, according to criteria established in WP2. **T8.2: Identification and selection of participants in the validation**, assessment and implementation of these actions. Partners evaluate potential characteristics of participants in order to detect those matching selection criteria. - Collection of assessment cards made by representatives of target public. - Carrying out interviews with representatives of the objective public who have participated in the validation. - Analysis of assessment cards and interview results. **T7.3: Validation report including suggestions about improvements.** A report is made including the results of the assessment carried out by representatives of target public, describing the strengths and weaknesses of the self-learning system D-FACTO. It also indicates which improvements must be implemented in the system.

Description of methodological/pedagogic framework (if applicable)

Validation and assessment are based on a methodology and tools which are the same for all partners. A recipient and user sample will be selected according to criteria established in the methodological framework (WP2), and it will be implemented in similar contexts in the 7 countries.

Contents and materials evaluated:

• Permanent applicability

• Adaptation to target public

• Relevance

• Satisfaction

System and tools evaluated:

• Accessibility

• Ease of navigation

• Participant satisfaction

Expected results to which this WP contributes			
No.	1	**Description of the results**	- A HIGH-QUALITY "TUNED" SELF-LEARNING SYSTEM, WITH FUNCTIONAL SELF-DIAGNOSTIC, HIGH-QUALITY TRAINING AREA AND PROPER SUPPORT SYSTEM, ADAPTED TO THE NEEDS OF RECIPIENTS AND USERS. IMPROVEMENT NEEDS WILL BE REFLECTED IN THE VALIDATION AND ASSESSMENT REPORT MADE BY REPRESENTATIVES OF THE TARGET PUBLIC. - REPORT OF THE VALIDATION AND TESTING PHASE IN WHICH WILL DESCRIBE THE TOOLS USED AND THE RESULTS OBTAINED AFTER LEARNING TESTING SYSTEM WITH A SELECTED GROUP THAT REPRESENTS A POTENTIAL END USERS. REPORT TO REFLECT THAT NEEDS IMPROVEMENT DETECTED IN THE SECTION OF TESTING AND TO BE INTEGRATED INTO THE BASE OF KNOWLEDGE.

WP number:	9		
WP title:	DISSEMINATION AND AWARENESS		
Start date:	01/05/2010	End date:	30/09/2010
2.2.25 WP Leader:	CETIEX		
Aims of WP:			

Development of the awareness raising plan and dissemination tools of the project in order to show the advantages of accessible and / or emotional design techniques and its results to the widest possible range of stakeholders, beneficiaries and target public, as well as its dissemination to the general public execute the awareness raising for beneficiaries and potential users. Among all partners there is a great capacity for diffusion and impact due to the great number of networks, consortiums, projects, clusters, communities, etc. in which they are involved.

2.2.26   Description of activities:

T9.1: Dissemination and awareness plan: Development of methodology to perform awareness-raising workshops addressed to target public and describes in greater detail the diffusion strategy and activities, including who are targeted publics, the strategy to follow to reach each of them and the diffusion tools to be used with each targeted group.

T9.2: Creation of dissemination and awareness materials:

a. *Creation of awareness-raising tools*:

- Definition of methodology of awareness-raising workshops,

- Elaboration of basic and standard documentation,

- Definition of collection and measurement system for workshop results.

b. Creation of dissemination materials

- Leaflet with generic information about the project.
- Press kit: creation of an on-line press dossier where main and local partners can download press information and documentation that they find suitable depending on the media involved.

- Web page containing free access tools and information: Overview of the project, partners, database and links.

- Electronic newsletter; 4 editions throughout the project with information about the project and the executive coaching for executive management in general.

T9.3: Organization of awareness-raising and training workshops to show target public and users how to make the most of the knowledge base.

- Organization of an awareness-raising workshop in each region (6 workshops in total).

T9.4: Execution of dissemination activities:

a. Press conferences (minimum 1 per main partner),

b. Presentation of the project and results in conferences, symposiums and seminars,

c. Publication of articles in press and specialized journals,

d. Registration of the Web page in other Web pages related to the project topic.

e. Creation of links from partner Web pages to the project Web page,

f. Dissemination of results by (main and local) partners through local, regional, national and international networks.

g. Closing conference, open to every representative of the target public.

Description of methodological/pedagogic framework (if applicable)
2.2.27

The awareness-raising tools and the organization of a practical awareness-raising workshop are considered of vital importance, and that is why the creation of a specific work package for this topic is necessary.

The efficacy of workshops and the perceived interest is assessed across: the number of participants, the number of contacted organizations/persons, the number of involved experts, distribution according the type of organization, the main activity and the functional level and satisfaction of participants (through a questionnaire distributed with the workshop documentation).

The standard methodology guarantees an execution with the same quality and efficacy in workshops.

In the same way, the Procedure and Management manual includes the description of diffusion process, as well as the cards for collecting information on diffusion activities. Every 6 months the WP partner collects the cards to be reviewed.

The diffusion activities are assessed taking into account diffusion media characteristics and target public.

a. WEB PAGE: The extent of the diffusion is assessed. The assessment is done across the number of visits and the number of pages with links to the project Web page. It is the General Coordinator who carries out the assessment along the project.

b. NEWSLETTER: The suitability to target public and relevance is assessed through on-line downloads.

c. PRESS KIT: The interest generated in press is evaluated through the presence of media in press conferences and the number of downloads of the on-line press kit.

d. CLOSING CONFERENCE: Efficacy, perceived interest, quality, applicability of speeches and multi-agent nature are assessed. The assessment is done through: the number of participants, the number of contacted companies/persons, the number of involved experts, the distribution of participants according the type of organization/company, the main activity (in the sector) and the functional level of the person and the satisfaction of participants (through an assessment questionnaire).

Expected results to which this WP contributes			
No.	1	**Description of the results**	AWARENESS-RAISING IN RECIPIENTS TO D-FACTO RESULTS AND TO THE NECESSITY OF INCORPORATING EXECUTIVE COACHING TECHNIQUES IN THE PEOPLE MANAGEMENT PROCESS THROUGH WORKSHOPS, BASED ON A STANDARD METHODOLOGY THAT CAN BE USED BY ALL ORGANIZATIONS SUPPORTING EUROPEAN SMEs. DIFFUSION PROGRAM DESCRIBING TARGET PUBLIC, COMMUNICATION CHANNELS THAT WILL BE USEFUL TO REACH EACH IDENTIFIED GROUP AND DIFFUSION TOOLS TO BE USED IN EACH CASE. THE PROGRAM WILL BE ACCOMPANIED BY A COMPLEMENTARY DOCUMENT THAT WILL GATHER INFORMATION ON THE DIFFUSION ACTIVITIES PERFORMED ALONG THE PROJECT. WIDE DIFFUSION OF THE PROJECT AND ITS RESULTS THROUGH DIFFUSION TOOLS DESIGNED FOR THIS PURPOSE: 1. CONFERENCES, SYMPOSIUMS AND SEMINARS: THERE WILL BE SPECIFIC PRESENTATIONS ALONG THE PROJECT ABOUT THE RESULTS CARRIED OUT BY PARTNERS, AND THEY WILL ORGANIZE SHORT-DURATION EVENTS (MINIMUM 1 PER PARTNER DURING THE PROJECT DURATION). IT IS ALSO POSSIBLE TO MAKE THESE PRESENTATIONS WHEN OPPORTUNE EVENTS TAKE PLACE IN THEIR AREA. 2. PRESS: CREATION OF AN ON-LINE PRESS DOSSIER WHERE MAIN AND LOCAL PARTNERS CAN DOWNLOAD INFORMATION AND DOCUMENTATION THAT THEY FIND SUITABLE DEPENDING ON THE MEDIA INVOLVED. 3. WEB: DEVELOPMENT OF A WEB PAGE HAVING FREE ACCESS TO INFORMATION AND TOOLS AS WELL AS RESTRICTED WORK AREAS FOR PARTNERS AND PARTICIPANTS IN THE TRAINING ACTION. 4. CLOSING CONFERENCE: AT THE END OF THE PROJECT, A CLOSING CONFERENCE WILL TAKE PLACE. IT WILL BE OPEN TO EVERY REPRESENTATIVES OF TARGET PUBLIC, AND THERE WILL BE EXPOSITIONS ABOUT PRACTICAL EXAMPLES OF EXECUTIVE COACHING AS WELL AS THE PRESENTATION OF THE PROJECT'S RESULTS. 5. NEWSLETTER & LEAFLET: CREATION OF AN ON-LINE NEWSLETTER WITH INFORMATION ABOUT THE STATE OF THE PROJECT AND WITH ARTICLES AND INTERESTING INFORMATION ABOUT EXECUTIVE COACHING FOR THE TARGET PUBLIC. THE LEAFLET WILL CONTAIN GENERIC INFORMATION ABOUT THE PROJECT. NEWSLETTER WILL HAVE 4 EDITIONS, THE LEAFLET A SINGLE EDITION. 6. LOCAL, REGIONAL, NATIONAL AND INTERNATIONAL PARTNER NETWORKS. RESULTS: R15 (METHODOLOGY AND WORKSHOPS), R16 (DIFFUSION PROGRAM), R17 (NEWSLETTER), R18 (LEAFLET), R19 (WEB), R20 (PRESS KIT).

Assesment Methodology

WP number:	10		
WP title:	EVALUATION		
Start date:	01/10/2009	**End date:**	30/09/2011
2.2.28 WP Leader:	FUNDECYT		
Aims of WP:			

Evaluation of the learning system with D-FACTO support tools. It must make the evaluation of the knowledge base, self-diagnostic tool, training area and support services, by agents from target audience.

The aim is to identify weaknesses and possible improvements in materials, content, tools and support system and solve them, moreover to incorporate the improvements indicated by the validation and testing phase. The evaluation allows to improve both the system contents, functionality and user friendliness, and evaluating its implementation.

Also, in this WP will be established the future sustainability of the results in the operating plan, including a business plan and describes the steps to follow.

2.2.29 Description of activities:

T10.1: Definition of internal evaluation methodology. There will be an interim assessment of project development and its contents, in order to make the necessary adjustment measures, and a final evaluation with all the results.

T10.2: Interim and final evaluation:

- Identification and selection of participants in the validation to evaluate them. The partners will assess the characteristics of potential participants to select those that best meet the selection criteria.
- Collecting the evaluation sheets by representatives of the direct target.
- Conducting interviews with representatives of target audience who participated in the validation.
- Analysis of the assessment sheets and interview results.
- Conducting an assessment report including recommendations for improvements.
- Carrying out the improvements indicated in the evaluation report to adjust the D-FACTO to the real needs of target audiences.

T10.3: Elaboration of an exploitation plan describing the actions to follow for the sustainability of results. It is created as a complement to the overall exploitation plan for the entire consortium. Each partner will elaborate an appendix for this plan containing the exploitation intentions in their geographical area. This appendix will contain also a strategy plan and an implementation plan.

Description of methodological/pedagogic framework (if applicable) 2.2.30

The working methodology for project evaluation will be based on an initial assessment of the learning content and content support system halfway through the project for the feedback of the targets set at the beginning of the project, using statistically significant samples between the direct users of the systems, both teaching and training potential users. For the final evaluation results will be used in awareness workshops and in the Closing Conference, assessing attendance, adequacy of content and usability of the system developed in the project by attending these workshops and conferences. It has to develop a methodological framework and evaluation criteria that are common to all partners.

Expected results to which this WP contributes			
No.	1	**Description of the results**	- METHODOLOGY OF EVALUATION, INCLUDING THE DEVELOPMENT OF THE HANDBOOK OF ASSESSMENT AND TOOLS USED WITH POSSIBLE INDICATORS PROJECT REGARDING DEVIATIONS THE INITIAL OBJECTIVES, WHICH CORRECTS ERRORS AND ADAPT TO THE NEEDS OF THE REAL POTENTIAL USERSRESULT. - INTERIM EVALUATION REPORT, IN WHICH YOU DESCRIBE THE TOOLS USED FOR EVALUATION AND THE RESULTS OBTAINED WITH REPRESENTATIVES OF THE FINAL RECIPIENTS TO BE ABLE TO ADAPT TO YOUR NEEDS FURTHER. THIS FIRST ASSESSMENT IS MADE TOWARDS THE MIDPOINT IN THE PROJECT'S DEVELOPMENT, ONCE DEVELOPED CONTENT AND LEARNING SUPPORT SYSTEM, ALLOWING RECTIFICATION POSSIBLE. - FINAL EVALUATION REPORT, IN WHICH YOU DESCRIBE THE TOOLS USED FOR EVALUATION AND THE RESULTS OBTAINED WITH REPRESENTATIVES OF THE FINAL RECIPIENTS TO BE ABLE TO ADAPT TO YOUR NEEDS FURTHER. IN THIS LAST PHASE OF THE EVALUATION WERE DETECTED LEARNING SYSTEM FAILURES AND EVALUATED ITS ACCESSIBILITY AND ADAPTATION OF CONTENT, REFLECTING THE WEAK POINTS THAT SHOULD BE CORRECTED AND INCORPORATED INTO THE FINAL SYSTEM. - EXPLOTATION PLAN, AS DESCRIBED GUARANTEE USE OF MATERIALS RESULTS AND BEYOND PROJECT LIFE. INDICATE IN DETAIL THE USE OF LICENSES FOR THE MARKETING OF RESULTS, AND INCLUDES A BUSINESS PLAN THAT WILL DESCRIBE IN DETAIL THE STEPS FOR SUSTAINABILITY. BE SIGNED BY EACH PARTNER.

3   OVERALL EVALUATION GOALS

The two elements of the Project that will be evaluated are:

• The **outcomes** – and

• The **process** – how the outcomes were achieved, including how was the project managed (including the transnational element).

Both elements are of fundamental importance in gaining full understanding of the project. As such, two major forms of evaluation will help the evaluation process:

1) Implementation/Process Evaluation

The Process-based evaluation is geared to fully understand how the project works -- how it is been implemented and what results/ outputs it has.

Questions that need to be answered: Are the services or activities performed as planned? Are they reaching the intended target population? Are they reaching the intended number of participants? Is it leading to the products expected? How do the participants perceive these services and activities? Etc...

2) Outcomes Evaluation

The evaluation with an outcomes focus is increasingly important for EU co-funded projects as it is asked for by the EU funding Authority. The outcomes-based evaluation facilitates asking if the Consortium as a total and the partners individually are really doing the right activities to bring about the outcomes set in the beginning of the Project. Outcomes are benefits from participation in the program. D-Facto outcomes are going to be evaluated in terms of enhanced learning (knowledge, perceptions/attitudes or skills) or conditions, e.g., increased competencies, self-reliance, etc. Outcomes shall not be confused with project outputs, which are totally different and will be evaluated in the Process/ Implementation Evaluation, as deliverables (outputs) are part of the activities of the project.

Questions that need to be answered: Is the target group experiencing the changes in knowledge, attitudes, behaviours, or awareness that the project sought? What are the results of the partners' work? What is it accomplishing amongst the target group? Etc...

Apart from the above two frameworks (Implementation/Process and Outcomes) the Evaluation report will also attempt to answer to the following set of questions:

1. How were the program goals and objectives established?

2. Was the process effective?

3. What is the status of the project's progress toward achieving the goals?

4. Will the goals be achieved according to the timelines specified in the program implementation or operations plan? If not, then why?

5. How successful can the self-learning system be after the end of the project?

6. What are the main weaknesses and strengths of the system (diagnostic tool and training material)?

4 METHODOLOGY

The evaluation methodology is necessary to have clearly defined indicators, collected data for analysis and lastly it is important to have the findings, of the analysis, reported. As such the main stages of the methodology are the following:

i. Define performance indicators (process and output indicators, quantitative and qualitative indicators);

ii. Gather the data;

iii. Analyse the data; and

iv. Report the findings.

4.1 Topics for evaluation

As indicated above, the report will mainly evaluate the self-learning system. This includes the diagnostic tool and the training material. However, there are some criteria of fundamental importance at programme level, against which the D-Facto project was originally assessed and accepted for funding, and against which the report should try to evaluate. They are:

• **Innovation** – whether the products, processes or target groups are genuinely new/ innovative;

• **Transnationality** – the success of transnational working and the effectiveness of partners' contributions;

• **Partnership** – the overall management and administration of partnership working;

• **Validity** – whether some of the needs described in the initial justification have been met;

• **Dissemination** – whether the Project have reached a wide audience; and

•**Valorisation** – whether the Project has achieved multiplier effects through mainstreaming activity.

4.2 How data/information will be collected

The report will rely on:

1. Interviews and discussions with the project Leader's personnel;

2. The initial proposal;

3. A review of monitoring data collected since the proposal was compiled; and

5. The questionnaires that will be collected with feedback from the partners and users of the self-learning system

4.3 How data/information will be analyzed

An analysis is required to convert data into findings, which themselves call for a judgement in order to be converted into conclusions. The analysis is carried out on a question-by-question basis, in the framework of an overall design cutting across all questions of the questionnaire.

For the analysis of the data, three strategies will be partially followed:

• Change analysis, which compares measured / qualified indicators over time, and/or against targets

• Meta-analysis, which extrapolates upon findings of other evaluations and studies, after having carefully checked their validity and transferability

• Contribution analysis, which confirms or disconfirms cause-and-effect assumptions on the basis of a chain of reasoning.

The first strategy is the lightest one and may fit virtually all types of questions, for instance:

• To what extent are the D-Facto priorities still in line with the identified challenges?

• To what extent has the D-Facto mainstreamed a given cross-cutting issue in the implementation of its activities?

The other two strategies are better at answering cause-and-effect questions, for instance:

• To what extent has D-Facto contributed to achieving effect X?

• To what extent has D-Facto contributed to achieving effect X sustainably?

• To what extent has D-Facto contributed to achieving effect X at a reasonable time scale?

Once the strategy has been selected and the data collected, the analysis proceeds through all or part of the following three stages: data processing, exploration, explanation.

Data processing

The first stage of analysis will consist of processing information with a view to measuring or qualifying the indicators, or to answering the sub-questions. Data will be processed through operations such as cross-checking, comparison, clustering, listing, etc.

Provisional findings will emerge at this stage of the analysis. Further stages will aim to deepen and to strengthen the findings.

Exploration

The exploratory analysis will try to improve the understanding of all or part of the evaluated area, especially when knowledge is insufficient, or when surprising evidence does not fit available explanations.

The exploratory analysis will delve deeper and more systematically into the collected data in order to discover new plausible explanations such as:

•   Unforeseen explanatory factors

•   Factors favouring / constraining sustainability

•   Unintended effects

•   New cause-and-effect assumptions

The exploratory stage may not be needed for all questions. When such an analysis is carried out, brainstorming techniques are appropriate. The idea is to develop new plausible explanations.

Explanation

The next stage ensures that a sufficient understanding has been reached in terms of:

•   Precisely defined outcomes, problems and changes

•   Plausible cause-and-effect explanations

•   Identification of key factors that challenged the projects' implementation

A satisfactory explanation (also called explanatory model) is needed for finalising the analysis.

5 METHODOLOGY

The last stage of the analysis is devoted to confirming the provisional findings through a valid and credible chain of arguments. This is the role of the confirmatory analysis.

To have a finding confirmed, the evaluation undertakes a systematic self-criticism by all possible means.

6 RECOMMENDATIONS

The last part or the Evaluation Report consists of the recommendations of the evaluator. The recommendations will provide information so that the partners:

1. Understand the added value of the project in terms of creativity and innovation

2. Understand, verify or increase the impact of products or activities of the project

3. Evaluate the roles of the partners in the consortium

4. Get information on the monitoring of the project

5. Take any corrective actions

6. Verify if the project's outcomes are those which were originally set

7. Consider any necessary changes in the projects self-learning system

APPENDIX A – CODIFICATION OF DELIVERABLES

Note: You have to number the appendix manually: Appendix A, Appendix B, Appendix C, etc.

Workpackage	Deliverable number	Deliverable name	Specifications
Workpackage 1	R1	Management and Procedure Manual Anex: Project Template	Electronic .pdf
	R2	Project Management Tool	Electronic
Workpackage 2	R3	Methodological Framework	Electronic: .pdf
	R4	Transfer Report	Electronic: .pdf
Workpackage 3	R5	Analysis Report	Electronic: .pdf
Workpackage 4	R6	Materials and Contents Map	Electronic: .pdf
Workpackage 5	R7	Set of training materials	Electronic: .pdf
Workpackage 6	R8	Training Materials	Electronic: .pdf
	R9	Support Techniques and tools	Electronic: .pdf
Workpackage 7	R10	Self Learning Requirements	Electronic: .pdf
	R11	D-FACTO Self Learning System	
Workpackage 8	R12	Validation and testing Methodology	Electronic: .pdf
	R13	Validation and testing Report	Electronic: .pdf
Workpackage 9	R14	Dissemination Plan	Electronic: .pdf
	R15	Workshops	
	R16	Leaflet	Paper
	R17	Newsleter &	Electronic: .pdf
	R18	Press Folder	Paper
	R19	Website of the project	Electronic
Workpackage 10	R20	Assesment methodology	Electronic: .pdf
	R21	Assesment interim report	Electronic: .pdf
	R22	Assesment final report	Electronic: .pdf
	R23	Explotation plan	Electronic: .pdf