

# A Model for Erasmus+ Expert Training

## Support Notes for National Agencies

Key Action 1 (2018 version)

## INTRODUCTION

These support notes have been developed for use by Erasmus+ National Agencies wishing to use the *Model for Expert Training* for the training of (internal and external) experts assessing applications under the decentralised sub-actions of Erasmus+ Key Action 1.

These support notes should be consulted alongside the PowerPoint presentation 'A Model for Erasmus+ Expert Training - Expert Training Session for KA1' in which the following sub-actions are covered:

- Mobility Projects for Higher Education Students and Staff (Consortium Accreditation in HE and Mobility between Programme and Partner Countries);
- Mobility Projects for VET Students and Staff;
- Mobility Projects for School Education Staff;
- Mobility Projects for Adult Education Staff.

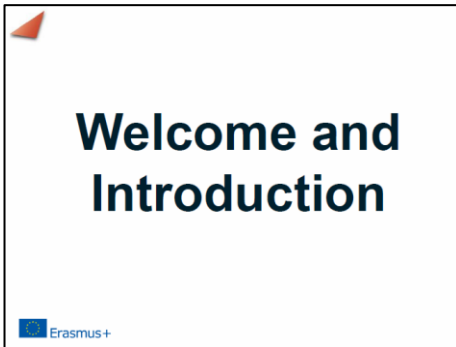
Support notes relate, predominantly, to the activity-based elements of the above-referenced PowerPoint presentation and confirm, in each case: aims; expected outcomes; timing, organisation, actors and roles; required materials; related briefing sheets<sup>1</sup>; and, alternative delivery options (where these exist). In table 1 (overleaf), the current Support Notes are mapped against specific slides within the main presentation.

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<sup>1</sup> a series of *Model for Expert Training* briefing sheets has also been developed to support the delivery of KA1 expert training

Table 1: Support Notes mapped against Specific Slides within the Expert Training Session for KA1

Slide Number(s)	Title of Slide or Session	Additional Support
1	Cover Page	Support Notes not required: only location and date need to be added.
2-6	Welcome and Introduction	Support notes provided in this document.
7-18	The Erasmus+ Programme	Support notes provided in this document.
19-23	Policy Insight	Support notes provided in this document.
24-26	Scoring Overview	Support notes provided in this document.
27-33	Practice Makes Perfect	Support notes provided in this document.
34	Online Expert Assessment Tool (OEET)	Title page only (separate presentation).
35-38	Processes and People	Support notes provided in this document.
39-41	More Practice Makes Perfect	Support notes provided in this document.
42-54	Creating Comments	Support notes provided in this document.
55-59	Budget Assessment	Support notes provided in this document.
60-63	Consolidation	Support notes provided in this document.
64	Questions and Close	Support Notes not required: provides option for final questions.



Slides 2-6

### AIM/S

- To welcome participants and introduce those actors involved in training delivery.
- To confirm the goals of the training session;
- To allow the *Model for Expert Training* TCA to be introduced and the associated actors and agencies acknowledged for their contributions in developing the model and materials.
- To provide an icebreaker session enabling participants to get to know each other.

### EXPECTED OUTCOME/S

- Participants are aware of who is in the room (delivery actors and other participants).
- Participants are aware of the goals and objectives of the training session.
- Participants are aware of the history of development of the "Model for Expert Training" (slides, materials, etc.).

### TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **15 minutes**.
- The initial welcome is delivered by the host organisation - usually a senior staff member but this can also be the trainer/facilitator - confirming the goals of the day (i.e. to provide a practical insight into the KA1 assessment process) and the source (i.e. the "Model for Expert Training" developed as part of a TCA involving Erasmus+ NAs from Iceland, Norway and Sweden, and an external consultant from Scotland) (**5 minutes**).
- After the initial welcome, it is important to allow time for participants to get to know both the key actors involved in delivering the training session, and the other participants - this can take the form of an Icebreaker such as the one presented below: Who are we? Who are you? (**8 minutes**).
- **Who are we?** start by asking those involved in the delivery of the training (trainer/facilitator and others) to state their first name along with 3 facts about themselves - this can be verbal or can use props such as flipchart - it can be fun where one of the facts is non-work related (e.g. pet, favourite colour, hobby) but remaining facts should be work related and should allow those in the room to "get to know" the key actors better.
- **Who are you?** this part of the exercise allows participants to get to know the people in the room – participants should be given a few

minutes to present their name, institution and job alongside one other fact (e.g. favourite animal) which you can predetermine. This can be done either to the whole group, or to their table, or to their neighbour [depending on group size and the time available].

- The welcome session is closed by reminding participants of the practical and interactive nature of the training session. Where possible incentives should be used to encourage active participation during the training sessions (i.e. awarding pens or other marketing materials to those playing an active role in the session) (**2 minutes**).

### REQUIRED MATERIALS

Incentives for those playing an active role (for use throughout the training session).

### RELATED BRIEFING SHEET/S

None.

### ALTERNATIVE DELIVERY OPTION/S

Where time is limited, or where delivering to a large group of participants, the Icebreaker could be replaced by providing a short overview of the participant types (e.g. XX persons from XX countries) moving on to a show of hands in relation to a series of introductory questions (for example, those representing VET, those representing industry, those working for the Erasmus+ NA).



Slides 7-18

### AIM/S

- To confirm levels of understanding of the Erasmus+ programme among participants.
- To confirm that the required “pre-reading” of Call Documents, Background Materials and Briefing Sheets has been undertaken by participants.

### EXPECTED OUTCOME/S

- Participants are aware of the importance of “pre-reading” Call Documents, Background Materials and Briefing Sheets and of the fact that this information is not repeated during the training session.
- Participants are fully aware of the breadth and reach of the Erasmus+ programme.
- Participants become familiar with the practical and interactive nature of the training session.

### TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **30 minutes**.
- A series of 10 questions has been prepared on a separate handout in which there are also 10 unique answers provided; as a first step, participants should work individually (using the handout) to match 10 questions with 10 individual answers (**5 minutes for introduction, 10 minutes for individual working**).
- Once everybody has completed the matching of questions and answers, answers can be presented using slides 9-18; participants can either mark their own work or exchange handouts with their neighbour; what is important is that experts recognise their own level of knowledge; the trainer/facilitator should highlight the fact that this is the only time that generic information on the Erasmus+ Programme will be presented advising those that found the questions particularly difficult, or those that achieved a low score, that they might need to re-read the Call Documents, Background Materials and Briefing Sheets to ensure the required depth of understanding prior to embarking on their assessments (**15 minutes**).

### REQUIRED MATERIALS

Call Documents, Background Materials and Briefing Sheets should be circulated to all training participants at least one week in advance, advising of the need to pre-read these documents in advance of attending the training session.

Quiz Match handouts (available as a part of the Model for Expert Training suite of materials) and pens.

### RELATED BRIEFING SHEET/S

- Assessment Comments Briefing Sheet
- Budget Assessment Briefing Sheet
- Criteria Briefing Sheet - Relevance
- Criteria Briefing Sheet - Quality of Project Design
- Criteria Briefing Sheet - Impact and Dissemination
- Criteria Briefing Sheet - International Credit Mobility
- Criteria Briefing Sheet - Quality of HE Consortium
- Where to Look Briefing Sheet (AE-SE-VET)
- Where to Look Briefing Sheet (HE ICM)
- Where to Look Briefing Sheet (HE Consortia)
- Briefing Sheet - Glossary
- Briefing Sheet - Policy Documents, Frameworks and Reports
- Erasmus+ Programme Briefing Sheet
- Erasmus+ Experts Briefing Sheet

### ALTERNATIVE DELIVERY OPTION/S

Quiz questions can be adapted to reflect specific actions, fields or priorities (depending on the audience of the training session).





Slides 19-23

#### AIM/S

- To provide participants with a rapid reminder of Policies, Frameworks and Priorities - such as Europe 2020, ET2020 and the EU Youth Strategy - also confirming Erasmus+ as a dedicated programme response.
- To remind participants of the existence of the Briefing Sheet for Policy Documents, Frameworks and Reports.

#### EXPECTED OUTCOME/S

- Participants are reminded of the contribution made by Erasmus+ to broader policy goals, and priorities.
- Participants are familiar with policies, frameworks and priorities that are specific to the fields of education, training and youth.
- Participants are aware of the fact that a dedicated Briefing Sheets exists in which additional links are provided to relevant Policies, Frameworks and Reports (transversal and field-specific).

#### TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **15 minutes**.
- The session can be delivered by the trainer/facilitator or by another participant (usually from the host body or from one of the involved partner organisations) that is familiar with the Policies, Frameworks and Priorities associated with the mobility and related developments in the education, training and youth sectors.
- The first slide focuses on the goals and targets of Europe 2020 and ET2020 presenting Erasmus+ as a Programme level response. The second slide provides a quick introduction to the EU Youth Strategy, important for those experts working on mobility applications across different fields of education, training and youth. The third slide introduces the 10 core actions of the New Skills Agenda for Europe (**3 slides each having 4 minutes**).
- Having confirmed the broader Policies, Frameworks and Priorities, participants are reminded of the existence of the Briefing Sheet for Policy Documents, Frameworks and Reports in which links are provided to the latest policy documents - one or two examples of the additional documents listed in this Briefing Sheet should be given (**3 minutes**).

#### REQUIRED MATERIALS

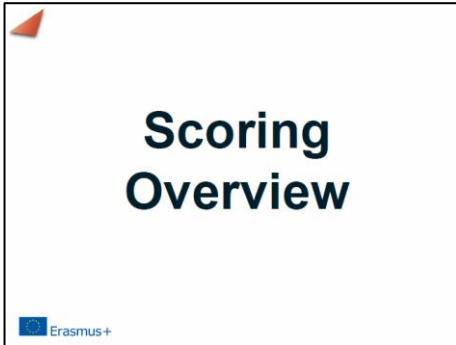
None.

#### RELATED BRIEFING SHEET/S

- Briefing Sheet - Policy Documents, Frameworks and Reports
- Where to Look Briefing Sheet (AE-SE-VET)
- Where to Look Briefing Sheet (HE Consortia)
- Erasmus+ Programme Briefing Sheet

#### ALTERNATIVE DELIVERY OPTION/S

Policies, Frameworks and Priorities can be updated to reflect specific actions or fields (depending on the audience of the training session) and/or to cover new Policies, Frameworks and Priorities.



Slides 24-26

#### AIM/S

- To introduce participants to the different scoring bands in use within the Erasmus+ Programme, confirming those used in the targeted actions and field(s).

#### EXPECTED OUTCOME/S

- Participants are aware of the maximum and minimum scores that they must use when rating projects as “very good”, “good”, “fair” or “weak” during assessment.
- Participants are aware of the consequences of rating a project as “weak” (i.e. that they are failing the threshold and, as a consequence, potentially failing the project application).

#### TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **5 minutes**.
- This session is delivered by the trainer/facilitator.
- This is a short session (relying on just two slides) yet one which provides an important reminder of the consequences of the different ratings and which will enable better informed discussion in the next session entitled “Practice Makes Perfect” (**5 minutes**).

#### REQUIRED MATERIALS

None.

#### RELATED BRIEFING SHEET/S

Erasmus+ Experts Briefing Sheet.

#### ALTERNATIVE DELIVERY OPTION/S

To keep things simple, the “Scoring Ceilings” being presented can be limited to those used in the targeted action(s) and field(s).

# Practice makes Perfect



Slides 27-33

## AIM/S

- To increase awareness of the different scoring bands (very good; good; fair; weak).
- To review the scores submitted by participants following “remote” scoring of a mock application.
- To prompt discussion among participants on the content of the mock application, with a view to forming a shared opinion (positive, less positive) and score.

## EXPECTED OUTCOME/S

- Recognition that experts can (and do) interpret the same application very differently, often attributing different scores to the same assessment criterion (or criteria).
- Improved understanding of the range of scores that can be awarded when rating a project as “very good”, “good”, “fair” or “weak” under different assessment criteria.

## TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **75 minutes**.

- The first part of the session is run by the trainer/facilitator who confirms the goals of the session and introduces the idea of using **GREEN** and **RED** cards to indicate “more positive” or “less positive” expert opinion (two introductory slides, including a test question to confirm understanding) (**5 minutes**).
- At this point, the session relies on 4 distinct steps, with the trainer/facilitator taking the lead on Steps 1, 2 and 4 and with Group Facilitators taking the lead in smaller groups (the role of these Group Facilitators – usually NA staff - is to keep the groups focused on the task in hand and on schedule).
- In Step 1, the trainer/facilitator points out the **HIGHEST**, **LOWEST** and **AVERAGE** scores (for the criterion) on the main screen (**2 minutes**).
- In Step 2, the trainer/facilitator seeks immediate input, asking all participants to indicate whether they were “more positive” when scoring (raising the **GREEN** card to show that they passed the threshold) or “less positive” (raising the **RED** card to show that they failed the threshold) (**3 minutes**).
- In Step 3, small groups of participants are formed - groups can either be predetermined (e.g. through using colours on badges or predetermined lists) or participants can be left to form their own groups (**5 minutes**).
- In Step 4, participants work in small groups to defend their position (why more positive, etc.) and should attempt to arrive at a single opinion or common position (i.e. more positive, less positive) which they will indicate to the whole group, in plenary, using either a **SINGLE GREEN CARD** or a **SINGLE RED CARD** - there will be instances where groups decide to hold up both colours at the end of the session - this is not wrong but confirms a lack of consensus (i.e. third assessment) (**15 minutes**).
- After these steps have been performed for the first assessment criteria (Relevance), Steps 1, 2 and 4 are repeated for remaining assessment criteria (Project Design; Impact-Dissemination) (**2\*20 minutes = 40 minutes**).
- At the end, the trainer/facilitator closes the session by providing a quick **OVERVIEW OF TOTAL SCORES** as awarded by individual experts, giving participants a chance to quickly comment or ask questions (**5 minutes**).

## REQUIRED MATERIALS

**GREEN** and **RED** CARDS. Mock assessment scoring sheet. Excel table for recording expert scores and producing charts.

## RELATED BRIEFING SHEET/S

- Criteria Briefing Sheet - Relevance
- Criteria Briefing Sheet - Quality of Project Design
- Criteria Briefing Sheet - Impact and Dissemination
- Erasmus+ Experts Briefing Sheet

## ALTERNATIVE DELIVERY OPTION/S

None.





*Slide 34 (introductory slide only)*

#### **AIM/S**

- To introduce participants to the Online Expert Assessment Tool (OEET) confirming access, operations, and requirements for use during the assessment exercise.

#### **EXPECTED OUTCOME/S**

- Participants are familiar with the OEET and know how to access and make use of this during the assessment exercise.

#### **TIMING, ORGANISATION, ACTORS and ROLES**

- The session expects to last **30 minutes**.
- This session is normally delivered by one of the NA staff that is responsible for, or fully familiar with access, operation and use of the OEET for assessment purposes.

- The session relies on a separate set of slides that is not a part of the “Model for Expert Training” suite of materials.

#### **REQUIRED MATERIALS**

In many cases, the European Commission’s “Online Expert Evaluation Tool (OEET) Expert User Manual” is delivered to participants during this session.

#### **RELATED BRIEFING SHEET/S**

None.

#### **ALTERNATIVE DELIVERY OPTION/S**

None.



Slides 35-38

#### AIM/S

- To provide participants with an overview of the different assessment (and selection) steps, confirming their role in the assessment process.
- To confirm the role of NA staff in the assessment and selection process, including tasks related to the quality assurance of expert assessments.
- To present the required (individual and consolidated) assessment pathways for KA1 mobility projects of different types, confirming routes to possible third assessment.

#### EXPECTED OUTCOME/S

- Participants are familiar with the role that they will play in the assessment process, and the role played by NA staff.
- Participants are aware of the processes for individual and consolidated assessment.

#### TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **15 minutes**.
- This session is delivered by the trainer/facilitator.
- This is a short session (relying on just three slides) yet one which provides an important overview of the roles of assessors and NA staff, and the assessment processes that must be followed.
- In the first slide, the goal is to confirm that the assessment forms part of a broader assessment, consolidation and contracting process (**5 minutes**).
- In the second slide, the goal is to confirm the breadth and range of tasks undertaken by NA staff, and to underline the fact that NA staff are responsible the quality assurance of expert assessments (**5 minutes**).
- In the third and final slide, the goal is to confirm the different requirements for assessing KA1 mobility projects (quality assessment by a single expert; quality assessment by more than one expert) as well as the potential for third assessment in cases of a significant difference in scores or where two experts cannot reach a consensus (**5 minutes**).

#### REQUIRED MATERIALS

None.

#### RELATED BRIEFING SHEET/S

Erasmus+ Experts Briefing Sheet.

#### ALTERNATIVE DELIVERY OPTION/S

The model presented in Slide 3 (Overview of Expert Assessment Activities) can be adapted in cases where the NA decides to internalise the consolidation process.



# More Practice makes Perfect

Slides 39-41

## AIM/S

- To achieve a common understanding of the key elements that are to be judged when assessing different award criteria for KA1.
- To prompt discussion among participants on the content of a mock application, with a view to forming a shared opinion.

## EXPECTED OUTCOME/S

- Improved recognition (by all) of the key elements that must be judged when assessing KA1 mobility projects under different assessment criteria (i.e. Relevance, Project Design, Impact and Dissemination).
- Common understanding (among participants) of the key elements that must be judged when assessing KA1 mobility projects under different assessment criteria (i.e. Relevance, Project Design, Impact and Dissemination).

## TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **120 minutes**.
- The first part of the session is run by the trainer/facilitator who confirms session goals and the requirement to work individually (Step 2) and in groups (Steps 3 and 4). **(3 minutes)**.
- The trainer/facilitator takes the lead in Step 1 and during final feedback, with Group Facilitators taking the lead in smaller groups (the role of these Group Facilitators - usually NA staff - is to keep the groups focused on the task in hand and on schedule).
- In Step 1, participants are divided into groups and advised of the assessment criterion that they will address - groups can either be predetermined or participants can form their own groups. **(2 minutes)**.
- In Step 2, participants are required to review a mock application, focusing on those sections relevant to the assessment criterion given to their group - whilst a group activity, the first element is reading, for which participants will probably sit alone (where possible, the mock application should be circulated in advance to allow pre-reading, leaving participants to use this time to refresh their memory of the application) **(20 minutes)**.
- In Step 3, participants work in small groups and discuss, in detail, the assessment criterion that they have been attributed, seeking consensus on the most important elements that need to be considered during assessment **(45 minutes)**.
- In Step 4, each group appoints a rapporteur (notetaker) and subsequently lists, on Flipchart, the key elements that have been discussed and agreed on by the group - limiting this to the assessment criterion that the group has been given **(10 minutes)**.
- Once all 4 steps have been completed (according to the schedule provided), participants return to a plenary session where each rapporteur is given 5 minutes to present their results and 5 minutes to respond to questions from other participants (notably, the focus should be on those that were not in the original group). After 30 minutes of feedback and questions, a final 10 minutes is allowed to respond to all or any questions on assessment criteria with the trainer/facilitator and/or NA staff invited to respond. **(40 minutes)**.

## REQUIRED MATERIALS

None.

## RELATED BRIEFING SHEET/S

- Criteria Briefing Sheet - Relevance
- Criteria Briefing Sheet - Quality of Project Design
- Criteria Briefing Sheet - Impact and Dissemination

## ALTERNATIVE DELIVERY OPTION/S

For smaller groups a single criterion might be assessed (e.g. Relevance). For larger groups, multiple groups might assess a single criterion, with field-specific groups also able to be formed.



Slides 42-54

### AIM/S

- To confirm expectations for assessment comments, ensuring a common understanding of the need to be coherent, comprehensive, consistent, courteous and concise.

### EXPECTED OUTCOME/S

- Improved understanding of the required depth, type and style of comments that assessors are required to produce (and submit) during individual and consolidated assessment phases.

### TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **40 minutes**.
- The session is delivered by the trainer/facilitator during a plenary session, with active contributions required from participants.

- Using the first slide, a template is shown during which the different sections of the assessment form are explained (i.e. comments under individual assessment criteria; scores under individual assessment criteria; overall comments for the applicant; overall comments for the NA; decision as to whether budget reductions are required) **(5 minutes)**.
- Using the second slide, participants are reminded of the need to provide judgements (rather than purely descriptive comments) and are informed of the need for comments that respect the 5 Cs (comments that are Coherent, Comprehensive, Consistent, Courteous and Concise); at this point, it is important to also remind participants of the Proportionality Principle for which a detailed explanation is given in the Briefing Sheet "Glossary" **(5 minutes)**.
- The third slide centres on a quick practical exercise, where one (volunteer) participant is invited to rate the four comments as: Weak, Fair, Good or Very Good: i.e. stating whether the expert perspective is Very Good, Good, Fair or Weak. The idea is to highlight the balance of positive and less positive comments, which will assist assessors when applying a score **(5 minutes)**.
- The fourth slide also centres on a quick practical exercise, where one (volunteer) participant is invited to say whether each of the four comments (as shown in the slide) should be ACCEPTED or REJECTED: as might be the case where a member of NA staff is reviewing the comments written by an individual expert. The idea is to show that "positive and constructive" comments are fine (i.e. even when an application is not so convincing, there is always room for constructive feedback) and that there is a need to avoid the "first person" perspective and/or referencing the assessors "own experience" **(5 minutes)**.
- The next six slides centre on a slightly longer, yet equally practical, exercise, with the goal being to practice the writing of comments... taking into account all that has been learned.
- Working individually, and using a predefined handout, experts are asked to prepare POSITIVE and LESS POSITIVE comments focusing on either the FRUIT BASKET or the TOOL BOX (only one graphic should be used from the two that are available, each relying on 3 separate slides). In both cases, the first slide presents a large graphic of the object (Fruit Basket or Tool Box), whereas the second slide defines what "high quality" means in relation to this object, enabling comments to be more easily prepared **(10 minutes)**.

*[continuation of notes for "Creating Comments"]*

- At the end, a short feedback session is held to find out which parts of the exercise were easy, and which parts not so easy, with participants reminded of the fact that experts can easily perceive things differently (based on their own experiences) and also informed of the existence of the Briefing Sheet on Assessment Comments in which "positive" and "less positive" examples are given (**10 minutes**).

#### **REQUIRED MATERIALS**

Creating Comments handouts (available as a part of the Model for Expert Training suite of materials) and pens.

#### **RELATED BRIEFING SHEET/S**

- Assessment Comments Briefing Sheet
- Briefing Sheet - Glossary

#### **ALTERNATIVE DELIVERY OPTION/S**

With smaller groups, each person could provide input during the final feedback session. With larger groups, time can be saved through inviting voluntary input from 1 or 2 participants and/or through seeking a general consensus from participants.





# Budget Assessment

Slides 55-59

## AIM/S

- To secure a common understanding on those aspects of the budget (for KA1 mobility projects) that are automatically controlled and those aspects which require a judgement from assessors.

## EXPECTED OUTCOME/S

- Improved awareness of assessor responsibilities for budget assessment relating to KA1 mobility projects.
- Improved confidence and competence, among assessors, in relation to budget assessment.

## TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **60 minutes**.
- The first part of the session is run by the trainer/facilitator who confirms session goals, provides short background information on budget assessment (quick overview of key points in the budget assessment briefing sheet, confirming that the focus for assessors is on mobilities that are appropriate, realistic, achievable and aligned with the capacity of the participating organisations) **(5 minutes)**
- The trainer/facilitator then introduces the budget assessment exercise before inviting participants to return to the groups in which they worked earlier (i.e. groups working on the second mock assessment exercise **(5 minutes)**.
- Having returned to smaller groups, group facilitators again take the lead, ensuring that the groups stay focused on the task (see below) and on schedule.
- In smaller groups, participants need to consider a set of 5 key questions that centre on KA1 budget assessment (questions are shown on a separate slide and are also provided in a separate handout) and to try to agree on a single set of answers each group also needs to appoint a rapporteur (notetaker) who will write down the agreed answers, on Flipchart, to display in the plenary room **(30 minutes)**.

- Once the allotted time has passed (30 minutes), all groups return to the plenary room (positioning their Flipcharts on the wall where all groups can see) whereupon the trainer/facilitator will pose a single question and will then invite the Rapporteur from each group to comment – this process is repeated until all 5 questions have been answered. The trainer/facilitator should try to underline areas where there is consensus or difference in opinion and should underline, in all cases, programme and NA expectations for budget assessment **(20 minutes)**.

## REQUIRED MATERIALS

Budget Assessment handouts (available as a part of the Model for Expert Training suite of materials) and pens.

## RELATED BRIEFING SHEET/S

- Budget Assessment Briefing Sheet
- Criteria Briefing Sheet - Quality of Project Design
- Where to Look Briefing Sheet (AE-SE-VET)
- Where to Look Briefing Sheet (HE ICM)

## ALTERNATIVE DELIVERY OPTION/S

Where there is limited time for group feedback, the trainer/facilitator could draw key messages from the displayed flipcharts, inviting input from the groups where additional clarification is needed.



Slides 60-63

### AIM/S

- To introduce participants to the concept of consolidation, confirming assessor roles and expectations for comments and scores.
- To improve awareness, among participants, of the need to consider wider expert / assessor opinion, as part of the consolidation process.

### EXPECTED OUTCOME/S

- Participants are familiar with the role that they will play in the consolidation process.
- Participants are aware of the required processes, and expected results, related to consolidation.
- Participants recognise the importance of considering wider expert/assessor opinion during consolidation process.

### TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **45 minutes**.

- The session is delivered by the trainer/facilitator during a plenary session, with active contributions required from participants.
- Using the first slide, participants are reminded of the scenarios in which consolidation is required (or not) and are informed that consolidated scores should not be simple mathematical averages (although it might be that the average is eventually selected) and that consolidated comments should read as a single text that is harmonised and not contradictory (**5 minutes**).
- The second slide centres on a practical exercise comprising two separate steps. In step 1, each participant is given a set of comments for which they need to add their own scores; in step 2, experts to come together in pairs to discuss and agree on a consolidated score, taking into account some of the core messages already presented in terms of consolidation (e.g. not automatic use of averages); for this to happen quickly and effectively, predefined comments have been prepared under the heading of “Quality of Project Design” for a KA1 Mobility application [available as a set of separate handouts]; notably, COMMENTS SET A is positive, COMMENTS SET B includes both positive and less positive comments and COMMENTS SET C is definitely less positive, which allows for two contrasting scenarios to be created: the first scenario centres on consolidating scores for COMMENTS SETS A and B with each including some positive elements this ought to be fairly

easy to achieve; the second scenario centres on consolidating scores for COMMENTS SETS A and C in which there are clear differences in opinion, making agreement not at all easy; this exercise centres solely on the consolidation of scores therefore just a short time is allowed (**5 minutes for individual scoring plus 10 minutes for consolidation = 15 minutes**).

After this short “consolidation and scores” exercise, the trainer/facilitator should invite feedback, asking whether a consolidated score was able to be achieved (or not) and what the difficulties were. Whilst the goal of the exercise is to achieve a single consolidated score for each “expert pair” it can also be interesting to highlight cases where a consolidated score is not achieved, confirming that there are scenarios where a third assessment might also be required. It is also important to underline that the overall goal of consolidation is to bring together a single set of comments and scores that can be used to provide positive or constructive feedback to the original applicant. Participants should also be reminded of the existence of the Assessment Comments Briefing Sheet (**15 minutes**).

### REQUIRED MATERIALS

Consolidation Comments handouts (available as a part of the Model for Expert Training suite of materials) and pens.

*[continuation of notes for "Consolidation"]*

Handouts should be circulated to participants according to the following ratio, to ensure that the two different scenarios can be delivered:

Comments Set A = 50%; Comments Set B = 25%;  
comments Set C = 25%.

**RELATED BRIEFING SHEET/S**

Assessment Comments Briefing Sheet

**ALTERNATIVE DELIVERY OPTION/S**

Where time allows, an additional exercise can be introduced in which "expert pairs" work together to create a single set of comments, based on those already predefined in the different handouts.