

A Model for Erasmus+ Expert Training

Support Notes for National Agencies

Key Action 2 (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 experts assessing applications under one of the decentralised sub-actions of Erasmus+ Key Action 2 (Cooperation for Innovation and the Exchange of Good Practices).

These support notes should be consulted alongside the PowerPoint presentation 'A Model for Erasmus+ Expert Training - Expert Training Session for KA2' in which the following sub-actions are covered:

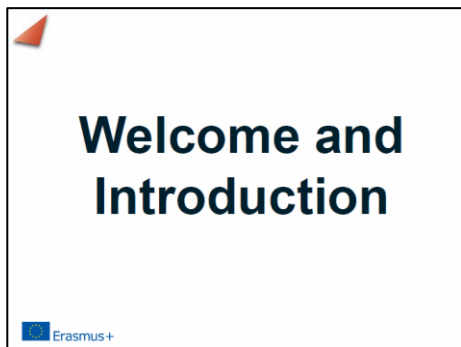
- Strategic Partnerships in the field of Education, Training and Youth (including School Exchange Partnerships).

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 sheets¹; and, alternative delivery options (where these exist). In table 1 (overleaf), the current Support Notes are mapped against specific slides within the main presentation.

¹ a series of *Model for Expert Training* briefing sheets has also been developed to support the delivery of KA2 expert training

Table 1: Support Notes mapped against Specific Slides within the Expert Training Session for KA2

Slide Number(s)	Title of Slide or Session	Additional Support
1	Cover Page	Support Notes not required: only location, date and logo need to be added.
2-8	Welcome and Introduction	Support notes provided in this document.
9-20	The Erasmus+ Programme	Support notes provided in this document.
21-25	Policy Insight	Support notes provided in this document.
26-27	Key Action 2 and Strategic Partnerships	Support notes provided in this document.
28-39	Understanding Strategic Partnerships	Support notes provided in this document.
40-43	Assessment Processes and People	Support notes provided in this document.
44-46	Assessment and Scoring	Support notes provided in this document.
47-55	Practice Makes Perfect	Support notes provided in this document.
56	The Panel	Support notes provided in this document.
57-59	More Practice Makes Perfect	Support notes provided in this document.
60-72	Creating Comments	Support notes provided in this document.
73-77	Budget Assessment	Support notes provided in this document.
78-81	Consolidation	Support notes provided in this document.
82	Online Expert Evaluation Tool (OEEET)	Support notes provided in this document: separate presentation also required.
83	Questions and Close	Support Notes not required: provides option for final questions.



Slides 2-8

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 KA2 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 one of those presented below. (**8 minutes**).
- **Icebreaker Option 1 - Meet the Room:** this icebreaker exercise comprises two parts; in the first part, the facilitator (trainer) and the organising team should be introduced, with each individual spending no more than 60 seconds introducing themselves (it is often easier to confirm, in advance, the information that each person will present - for example: name, job, role that they play in the session); in the second part, the focus is on the participants and it allows the facilitator to get an insight into who is in the room - at the start, the facilitator confirms that this is a physical exercise and that participants should form groups in the room based on their answers to a

series of questions or prompts (how this is done will depend on the space available e.g. forming groups against the walls or around tables); possible questions/prompts can include: [a] form a line from north to south based on the city in which you live... this one is a bit of fun and will help the facilitator to see the breadth of attendance from across the country; [b] dividing into internal participants (NA staff and assessors) and external participants (expert assessors); [c] form groups according to the field in which you most often work (AE, HE, SE, VET, Youth); form groups according to your familiarity with the Erasmus+ programme (know a little; quite familiar; unstoppable); [d] form groups based on the actions that you would normally assess (KA1, KA2, both); and, [e] form groups based on the type of assessor you perceive yourself to be (for example, ferocious lion, friendly rabbit).

- **Icebreaker Option 2 - Who are we? Who are you?** this icebreaker exercise also comprises two parts; in the first part you should start by asking those involved in the delivery of the training (facilitator, 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. Once the key actors are known, it is time for the participants to get to know each other (see part two).

[continuation of notes for “Welcome and Introduction”]

- In part two of the exercise, participants should be given a few minutes to present their name, institution and job alongside one other fact (e.g. strangest food ever eaten, favourite animal) based on questions or prompts that you have predetermined and added to a single slide. This introductory information can be presented either to the whole group, or to their table, or their neighbour - depending on group size and the time available.
- The welcome session is closed by reminding participants of the practical nature of the training session. Where possible try to use incentives 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

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

Flipchart: where opting to use this (instead of slides) to provide questions or prompts for the icebreaker.

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 based on a series of introductory questions (for example, those representing VET, those representing industry, those working for the Erasmus+ NA).



Slides 9-20

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 11-20; 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 for KA2 (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 - Quality of Project Team
- Criteria Briefing Sheet - Impact and Dissemination
- Criteria Briefing Sheet - School Exchange Partnerships
- Strategic Partnerships Briefing Sheet
- Where to Look Briefing Sheet (AE-HE-SE-VET)
- Where to Look Briefing Sheet (SEP)
- 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 21-25

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 strategic 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, confirming core objectives and initiatives and confirming how much of this is complementary to targets for development, change and improvement in education and training: this is particularly important for those experts working on multi-field applications in which developments in the field of Youth are also targeted. 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-HE-SE-VET)
- Where to Look Briefing Sheet (SEP)
- 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 26-27

AIM/S

- To introduce participants to the different types and formats of projects that are included under the heading of Key Action 2 and Strategic Partnerships, also confirming the management approach adopted for each (i.e. centralised, decentralised).

EXPECTED OUTCOME/S

- Participants are aware of the fact that Key Action 2 covers more than “Strategic Partnerships”, recognise the difference between centralised and decentralised financing, and are aware that Strategic Partnership projects can take more than one format.

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 one slide) yet one which provides an important insight into the different actions included under Key Action 2 of the Erasmus+ Programme (**5 minutes**).

REQUIRED MATERIALS

None

RELATED BRIEFING SHEET/S

Erasmus+ Programme Briefing Sheet.

ALTERNATIVE DELIVERY OPTION/S

None.



Slides 28-39

AIM/S

- To introduce participants to the goals, ambitions and (horizontal, field-specific) priorities for Strategic Partnerships (SPs).
- To provide an insight the different types and formats of SP for which financing can be requested, including School Exchange Partnerships, confirming how these align with the different fields of education and training.

EXPECTED OUTCOME/S

- Participants are aware of goals and ambitions for different types and formats of SP relevant to the fields of education and training.
- Participants are aware how different SP types and formats relate to different fields of education and training.
- Participants are aware of the need for SPs to address at least one Horizontal Priority or Field-specific Priority.

- Participants are aware of the types of funding that can be accessed, depending on the type of SP being submitted.
- Participants are aware of the types and (minimum) numbers of actors that are required to participate in different SP types and formats.

TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **25 minutes**.
- This session is delivered by the trainer/facilitator.
- In the first four slides, after the section title, the focus is on introducing the different project types (SP supporting Innovation, SP supporting Exchange of Good Practices, School Exchange Partnerships) confirming goals and ambitions, partners and actors, and the different types of project that can be accessed from different fields (**5-10 minutes**).
- In slides five, six and seven, the focus is on **PRIORITIES** for which there are two distinct steps: in step one, the facilitator introduces the horizontal priorities, relating these back to ET2020 goals [priorities were agreed as a part of the ET2020 mid-term review in 2015] and confirming that Horizontal Priorities are equally valid and acceptable when applying for SP funding; in step two, a volunteer is need for a practical exercise – the volunteer is provided with a set of 25 printed cards, with each card containing a single field-specific priority (for 2018, there are 25 field-specific priorities which extend across the 5 fields of education training

and youth); the volunteer needs to match these against the fields of AE, HE, SE, VET and Youth and can either choose to do this alone, or can ask other participants for help and support - for this to work effectively, the volunteer should work on a noticeboard, flipchart or large table where others can easily observe and contribute (**10-15 minutes**).

- In the final four slides, the focus is on the different areas of funding that can be accessed by different SP types and formats, with specific reference made to the importance of activities being “proportional” – this provides an opportunity to highlight the importance of the principle of proportionality during assessment (**5 minutes**).

REQUIRED MATERIALS

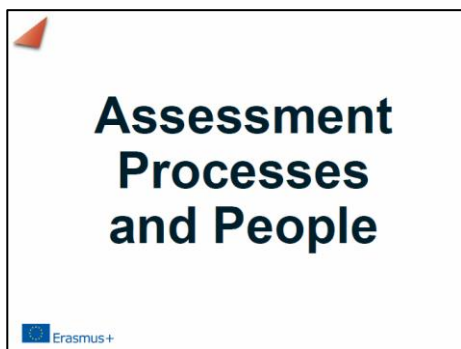
- A set of 25 printed cards, each containing one field-specific priority for SPs, against which these priorities can be aligned (available as a part of the Model for Expert Training suite of materials)
- Table, notice board or flipchart that can be used during the “volunteer” exercise.

RELATED BRIEFING SHEET/S

- Strategic Partnerships Briefing Sheet
- Budget Assessment Briefing Sheet

ALTERNATIVE DELIVERY OPTION/S

None.



Slides 40-43

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 different assessment pathways for KA2 Strategic Partnership projects of different types and formats, confirming routes to possible third assessment.

EXPECTED OUTCOME/S

- Participants are familiar with the role that they play in the assessment process and are aware of the different steps taken by NA staff and the Evaluation Committee.
- Participants are aware of the required steps for quality assessment (individual; consolidated) as well as the potential for quality-related feedback to be provided by NA staff.

TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **10 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 the assessment processes that must be followed.
- In the first slide, the goal is to confirm that quality assessment forms part of a broader assessment, selection and contracting process **(3 minutes)**.
- In the second slide, the goal is to confirm the role of NAs is managing and support the assessment, selection and contracting process **(3 minutes)**.
- In the third and final slide, the goal is to confirm the different requirements for quality assessment relating to different types of KA2 SP funding application (i.e. confirming the need for involving one or more experts as well as the possible need for third assessment - in cases where there are two assessors involved and where no consensus can be achieved **(4 minutes)**).

REQUIRED MATERIALS

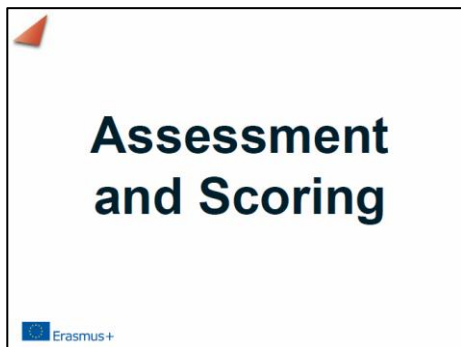
None.

RELATED BRIEFING SHEET/S

Erasmus+ Experts Briefing Sheet.

ALTERNATIVE DELIVERY OPTION/S

In cases where the NA decides to internalise the consolidation process, a note can be added to the third slide (Overview of Expert Assessment Activities) to reflect this.



Slides 44-46

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): as is the case for the “Assessor Training Session for KA2”.



Slides 47-55

AIM/S

- To increase awareness of the different scoring bands (very good; good; fair; weak).
- To review the scores submitted by participants in relation to a mock application.
- To prompt discussion among participants on the content of a 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 **90 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) **(2 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 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; Project Team; Impact-Dissemination) **(3*20 minutes = 60 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 **(3 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 - Quality of Project Team
- Criteria Briefing Sheet - Impact and Dissemination
- Erasmus+ Experts Briefing Sheet

ALTERNATIVE DELIVERY OPTION/S

Where time is limited, or where working with a smaller group, a single plenary discussion can take place, without breaking into groups.



Slide 56

AIM/S

- To provide an opportunity for experienced experts (i.e. those having participated in the assessment of KA2 Strategic Partnerships in the past) and NA staff (i.e. those with responsibility for KA2 Strategic Partnerships) to bring forth differing perspectives (for example: giving thoughts and perspectives on assessment processes and challenges, providing tips and sharing good practices and lessons learned).

EXPECTED OUTCOME/S

- Participants are confronted with differing yet (often) complementary expert and NA perspectives on the assessment processes - particularly useful for newly-participating experts - and can align this with that which they have already heard in terms of assessment regulation and delivery.
- Participants gain a fuller insight and overview of those aspects to look for, or pay attention to, when assessing a KA2 Strategic Partnership

application, in order to get a holistic view and to ensure that each and every application is assessed on its own merits, irrespective of size, theme or field(s) being targeted.

TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **30 minutes**.
- This session is led by the trainer/facilitator.
- This session requires that a small number of experts and NA staff are selected (and briefed) in advance; experts should be experienced in assessing Strategic Partnership applications; NA staff should be those who have a role in selecting, contracting, monitoring and supporting existing Strategic Partnerships.
- Discussion starts with ALL panellists being asked "What is the most important memory you take from the previous assessment exercise?". In responding, panellists should focus on: positive aspects of the assessment exercise; challenges they had to overcome (**max 2 minutes each = 10 mins**).

- This is followed by a short conversation (**20 minutes**) with panellists covering questions such as those listed below:

[Question] thinking of the **four assessment criteria** - relevance, project design, project team, dissemination and impact - was there a "specific method" that you applied to obtain a "holistic view" of the application and to arrive at your final score? (*Experts*);

[Question] for KA2-SP applications, it is important that experts apply proportionality in their assessments - one area where this is important is in being able to gauge the adequacy of activities proposed by both large and small applications (i.e. SP supporting innovation, SP supporting exchange of good practices): can you provide an example of how the **proportionality principle** might be considered during assessment? (*NA staff*);

[Question] in your opinion, what signifies a **good expert** - to be an expert in their field, or to be a professional assessor and able to communicate assessment results in a convincing manner? (*NA staff*);

[Final Question]: if you were able to give **just one piece of advice** to experts that are participating for the first time in this type of assessment exercise, what would that be? (*Experts and NA staff*).

REQUIRED MATERIALS

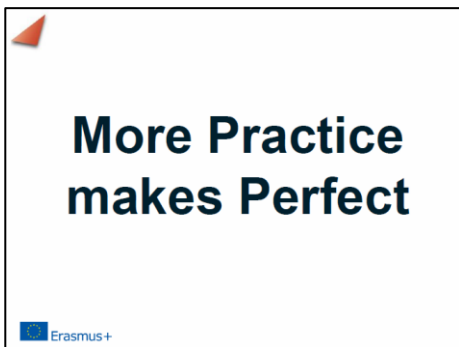
Tall, round tables (panellists should be standing).

RELATED BRIEFING SHEET/S

None.

ALTERNATIVE DELIVERY OPTION/S

Where time allows, questions can also be taken from participants in the audience (for example, participants write down questions on a piece of paper, confirming who the question is to be directed to and facilitator then asks the question).



Slides 57-59

AIM/S

- To achieve a common understanding of the core elements that are to be judged when assessing different award criteria for KA2 Strategic Partnerships (SP).
- 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 of the core elements that must be judged when assessing KA2 SP projects under different assessment criteria (i.e. Relevance, Project Design, Project Team, Impact and Dissemination).
- Common understanding of the core elements that must be judged when assessing KA2 SP projects under different assessment criteria (i.e. Relevance, Project Design, Project Team, Impact and Dissemination).

TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **100 minutes**.
- The first part of the session is run by the trainer/facilitator who confirms session goals and a requirement to work individually (Action 1) and in groups (Actions 2 and 3). (**5 minutes**).
- The trainer/facilitator takes the lead in plenary (introduction; feedback) activity, 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 working to schedule).
- Participants need to work in smaller groups (groups can be predetermined, or participants can form their own groups) with each group advised of the assessment criterion that they will address.
- In a first step (Action 1), participants are required to review (or revisit) the mock application, focusing on those sections relevant to the assessment criterion given to their group - this first action requires “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 (**30 minutes**).
- As a second step (Action 2), participants work in small groups and discuss, in detail, the assessment criterion that they have been attributed, seeking consensus on the most important elements (**20 minutes**).

- For the third and final step (Action 3), each group should appoint a rapporteur (notetaker who will list on Flipchart (and ultimately present during a short plenary session) the most important elements that were discussed and agreed upon, further presenting a final score for the assessment criterion that the group has been attributed (**10 minutes**).
- Once all 3 actions are accomplished (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 (i.e. those not taking part in the original discussion) (**35 minutes**).

REQUIRED MATERIALS

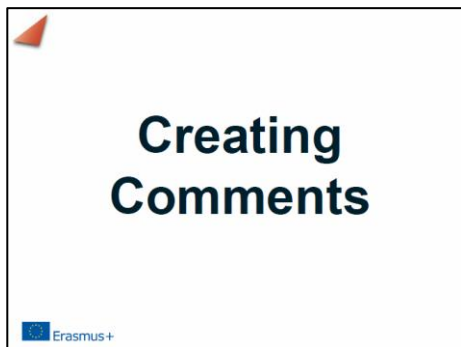
Flipchart and pens (for groupwork).

RELATED BRIEFING SHEET/S

- Criteria Briefing Sheet - Relevance
- Criteria Briefing Sheet - Quality of Project Design
- Criteria Briefing Sheet - Quality of Project Team
- 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 60-72

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 to the need for of 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"]

[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.



Slides 73-77

AIM/S

- To introduce the core elements that experts need to consider, reflect and comment on when assessing the budget of a KA2 Strategic Partnerships application

EXPECTED OUTCOME/S

- Improved awareness of assessor responsibilities for budget assessment relating to KA2 Strategic Partnerships projects.
- Improved confidence and competence, and common understanding among assessors, in relation to budget assessment.

TIMING, ORGANISATION, ACTORS and ROLES

- The session expects to last **65 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 a focus on units rather than costs, highlighting those areas of the budget that need to be considered by experts and confirming how this should be addressed in assessment comments (**5 minutes**).

- The trainer/facilitator then introduces the budget assessment exercise before inviting participants to break into 3 small groups – groups can be predetermined, or participants can form their own groups (**5 minutes**).
- Having formed 3 groups, group facilitators again take the lead, ensuring that the groups stay focused on the task and on schedule.
- Each of the small groups is provided with a budget assessment scenario which they need to discuss (Scenario 1 considers GOOD examples of Teaching, Training and Learning Activities; Scenario 2 considers GOOD and BAD examples of Intellectual Outputs; Scenario 3 considers GOOD and BAD examples of Multiplier Events); each group also needs to appoint a rapporteur (notetaker) who will write down the agreed answers on Flipchart to display, subsequently, in the plenary room (**30 minutes**).
- Once the allotted time has passed, all groups return to the plenary room - positioning their Flipcharts on the wall where all groups can see - whereupon the trainer/facilitator will introduce the budgetary theme that is being addressed with individual Rapporteurs then invited to provide feedback (3 groups each having 5 minutes = **15 minutes**).

- At the end of each session of “feedback”, the trainer/facilitator should underline how that which has been said aligns with the financial rules of the Strategic Partnership funding actions, pointing out where this is not the case. (**10 minutes in total**).

REQUIRED MATERIALS

Each group requires at least one printed copy of the budget scenario (available as a part of the Model for Expert Training suite of materials). It can also be useful to have at least one printed copy of the Budget Assessment Briefing Sheet for each group. Flipchart and pens required for recording the results of the 3 group sessions.

RELATED BRIEFING SHEET/S

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

ALTERNATIVE DELIVERY OPTION/S

Where there is limited time for group feedback, the trainer/facilitator could draw key messages from the individual group sessions, providing a short overview of that which was brought forth during the exercise (possibly also using the flipcharts produced by each group).



Slides 78-81

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 **40 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 two separate headings (Relevance; Quality of Project Design) for which only one heading should be selected for use in the practical exercise (in no case, should the two headings be mixed); 3 sets of comments are provided under each heading, for which COMMENTS SET A is notably 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 (**5 minutes for introduction to the practical exercise**).
- the first scenario centres on consolidating scores for COMMENTS SETS A and B: with each set of comments 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 where there are clear differences in opinion, making agreement not at all easy.
- the practical exercise centres solely on the consolidation of scores therefore just a short time is allowed (**5 minutes for individual scoring and 10 minutes for consolidation = 15 minutes overall**).

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**).

[continuation of notes for "Consolidation"]

REQUIRED MATERIALS

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

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

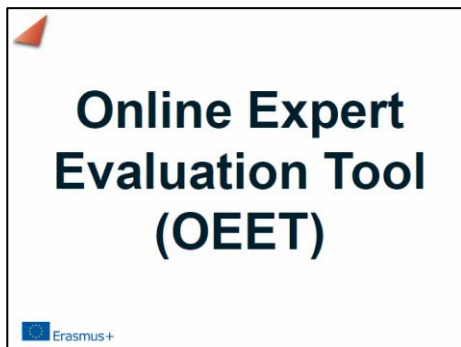
Comments Set A = 50%; Comments Set B = 25%;
comments Set C = 25%.

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.



Slide 82 (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 should be delivered by a member of NA staff that is 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 provided as 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.