



Education and Culture

**Organisation of events
(conferences, seminars and
exhibitions) for the exploitation of
innovative results from the
Leonardo da Vinci programme**

**Assessment of Calls EAC/88/03
and EAC/23/04**

Assessment undertaken by Paul Guest (UK), Michela Vecchia (IT) and Alfons Mertens (BE) on behalf of the European Commission's Directorate-General for Education and Culture (DGEAC).

| | |
|---|-----------|
| INTRODUCTION | 3 |
| 1. AIMS AND METHODOLOGY | 4 |
| 1.1 Assessment Questions | 6 |
| 1.2 Methodology | 8 |
| 2. UNDERSTANDING VALORISATION | 10 |
| 3. SELECTION AND LAUNCH OF PROJECTS | 11 |
| 3.1 Calls for Proposals | 11 |
| 3.2 Evaluation of Proposals | 12 |
| 3.3 Selected Projects | 13 |
| 3.4 Launch Meetings | 14 |
| 4. PROJECT DESCRIPTIONS | 15 |
| 5. QUANTITATIVE ANALYSIS | 24 |
| 5.1 Participating Organisations | 24 |
| 5.2 Target Groups | 24 |
| 5.3 Target Sectors | 25 |
| 5.4 Main Activities Undertaken | 26 |
| 5.5 Event Locations | 27 |
| 5.6 Number of Products Presented | 28 |
| 5.7 Number of Participants | 28 |
| 5.8 Products, Outputs & Results | 29 |
| 5.9 Projects Overview | 29 |
| 6. QUALITATIVE ANALYSIS | 32 |
| 6.1 Typology of Events | 32 |
| 6.2 Needs Analysis and the Identification of Products | 36 |
| 6.3 Brokerage and Follow-up Activities | 39 |
| 7. SURVEY OF PARTICIPANTS | 42 |
| 8. CONCLUSIONS AND RECOMMENDATIONS | 44 |
| CASE STUDIES | |
| ANNEXES | |

INTRODUCTION

This assessment was launched by Unit C3 (Dissemination and Exploitation of Results) of the Directorate-General for Education and Culture (DGEAC). The assessment undertakes to analyse the results of two Calls for Proposals (Calls) launched in the framework of the Directorate-General's Dissemination and Exploitation Strategy with particular regard to projects funded under the Leonardo da Vinci Programme.

It should be noted that, at the time of these Calls, DGEAC was using the French term, 'valorisation' interchangeably with the English term 'dissemination and exploitation', and this approach is also therefore followed within the body of this assessment. It should be noted, however, that, in line with the recommendations of the recent external evaluation of mechanisms for the dissemination and exploitation of results¹ of DGEAC's programmes and initiatives, a common terminology has been adopted in English, French and German², and EAC is currently considering the scope for translation into all official languages.

¹ Available at:
http://europa.eu.int/comm/dgs/education_culture/evalreports/index_en.htm#crossHeader

² Glossary available at:
http://ec.europa.eu/dgs/education_culture/valorisation/doc/glossary_en.pdf

1. AIMS AND METHODOLOGY

The Terms of Reference for this analysis required:

- an assessment of the outcomes and results achieved under the two Calls for Proposals;
- comment on the value-added and lessons learnt from running this type of Calls for Proposals; and
- recommendations for developing and improving future similar instruments for the dissemination and exploitation of results;

This in order to achieve the two main objectives of this assessment:

- to identify good practices, case studies, 'handy hints' etc in support of DGEAC's promotion of dissemination and exploitation activities; and
- to provide recommendations towards successful dissemination and exploitation projects under the new Lifelong Learning Programme (LLL)

The question to be addressed by DGEAC is whether the two Calls (EAC/88/03 and EAC/23/04 – annexes I & II) managed to stimulate an increase in the use of Leonardo da Vinci products and results and to activate new channels and levels of participation and networking amongst different VET actors, and if so, whether these results can be considered as representing good value against the financial and human investment made.

In preparing the assessment report, particular attention was paid to the analysis of both outcomes and results achieved by the selected projects in order to identify added-value and lessons learned and to provide recommendations for the development and improvement of future instruments, in particular those to be launched during the new programme (LLL).

The assessment does not however focus upon assessing the medium and longer term impact of the individual projects on national and European level education and training systems, since the time frame since completion of the projects is too short. This aspect should be covered under the formal evaluation of the Leonardo da Vinci Programme.

This report will therefore present a **summative assessment**, presenting conclusions on the merit and worth of the Calls and, where appropriate, providing recommendations for improvement.

This assessment meets two identified needs for DGEAC, namely, the political need (the need to demonstrate that the quality and added-value of the results of the two Calls justifies similar actions within the new programme) and the related need for synergy (the need to expand such initiatives to other programmes creating a pan-directorate approach to Dissemination and Exploitation for projects managed by the Directorate-General).

When considering the list of questions which this assessment should address, a fundamental consideration was the **usability** of the end assessment report, for which it was felt that usability depends upon three key elements:

1. the use of relevant and clear questions
2. the use of relevant methods and tools: the 'art and craft of policy analysis'³ should be supported by both qualitative and quantitative methods
3. the need for relevant and transparent results: results must be presented in an understandable way in order to assure usability

³ Wildavsky A., 1996, *Speaking Truth to Power. The Art and Craft of Policy Analysis*, New Brunswick, Transaction Publisher

1.1 Assessment Questions

The process of establishing questions able to guide the assessment began with an analysis of the main objectives of the two Calls.

Box 1 – Issues considered when assessing project results in relation to Calls for Proposals

Calls for Proposals

- ✓ Issue - need to enhance the level of use of and to raise awareness of Leonardo da Vinci products and results amongst potential new end users
- ✓ Objective - to develop and promote a mechanism for the exploitation of new Leonardo da Vinci products and processes; to support a matching of products and processes to meet new users' needs facilitating the transfer and integration of innovative results
- ✓ Means – organisation of events (seminars and conferences) to showcase Leonardo da Vinci products and processes, to facilitate networking and information exchange and the transfer of products and results into new contexts and to act as a broker between developers and potential new users before, during and after the event(s).

Context

- ✓ Projects funded as a result of Calls for Proposals (EAC/88/03 and EAC/23/04)

Beneficiaries

- ✓ Project promoters⁴ / Contractors⁵
- ✓ Training practitioners; potential new end users
- ✓ Policy and decision makers in local, regional, national and/or European training systems and practices

Analytical activity for the assessment did not involve the collection of new data but relied upon existing project data (application, monitoring reports, interim and final reports, project assessments) with a view to undergoing a comparative synthesis between identified policy objectives and the results obtained through the implementation of the selected and funded projects.

The structure of individual projects (*c.f. Fig. 1*) further confirmed a number of key elements for analysis:

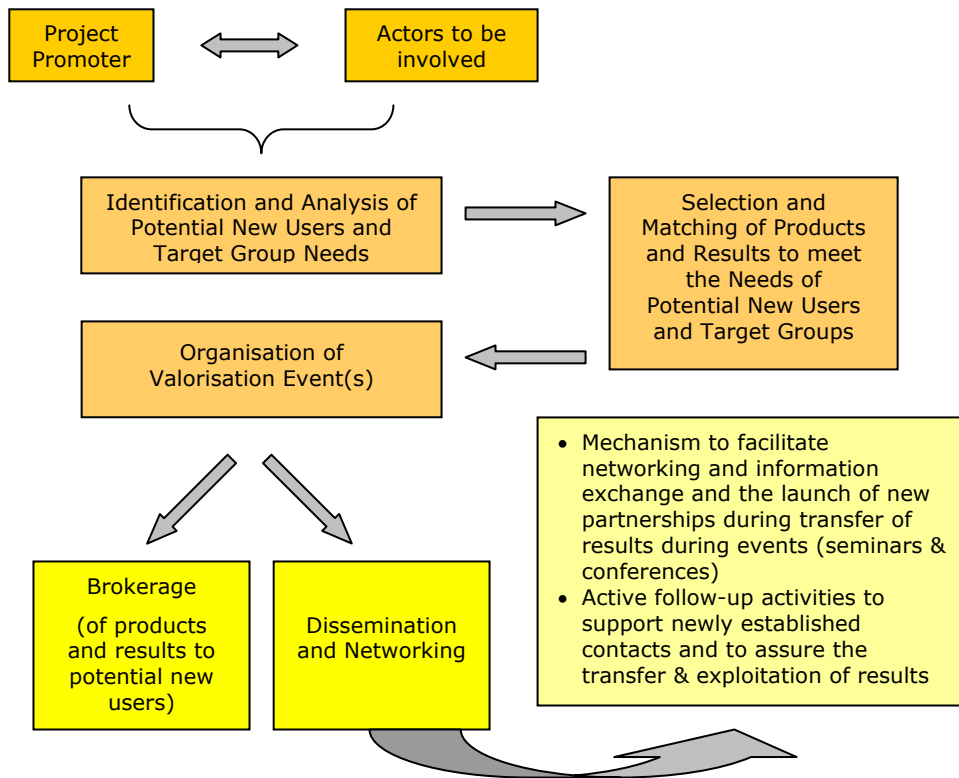
- types of actors involved
- types of analyses undertaken in the selection of products/results and in matching products/results to identified needs (potential new end users, new contexts)

⁴ any legally registered private, public or semi-public institution or body declaring its intention, in accordance with the set procedures, to submit a proposal following a Call for Proposals. The promoter will become the Contractor where a proposal is accepted and a project begins

⁵ any legally registered private, public or semi-public institution or body which on behalf of itself and any other Partners associated with the request for financial support, is liable under the Agreement and is responsible for the day-to-day co-ordination and management of the project and, where appropriate, for distributing the allocated Community funds

- valorisation events held in order to showcase products & results and to facilitate contacts & exchanges amongst relevant stakeholders
- types of follow-up activities undertaken in order to assure the sustainability of project activities

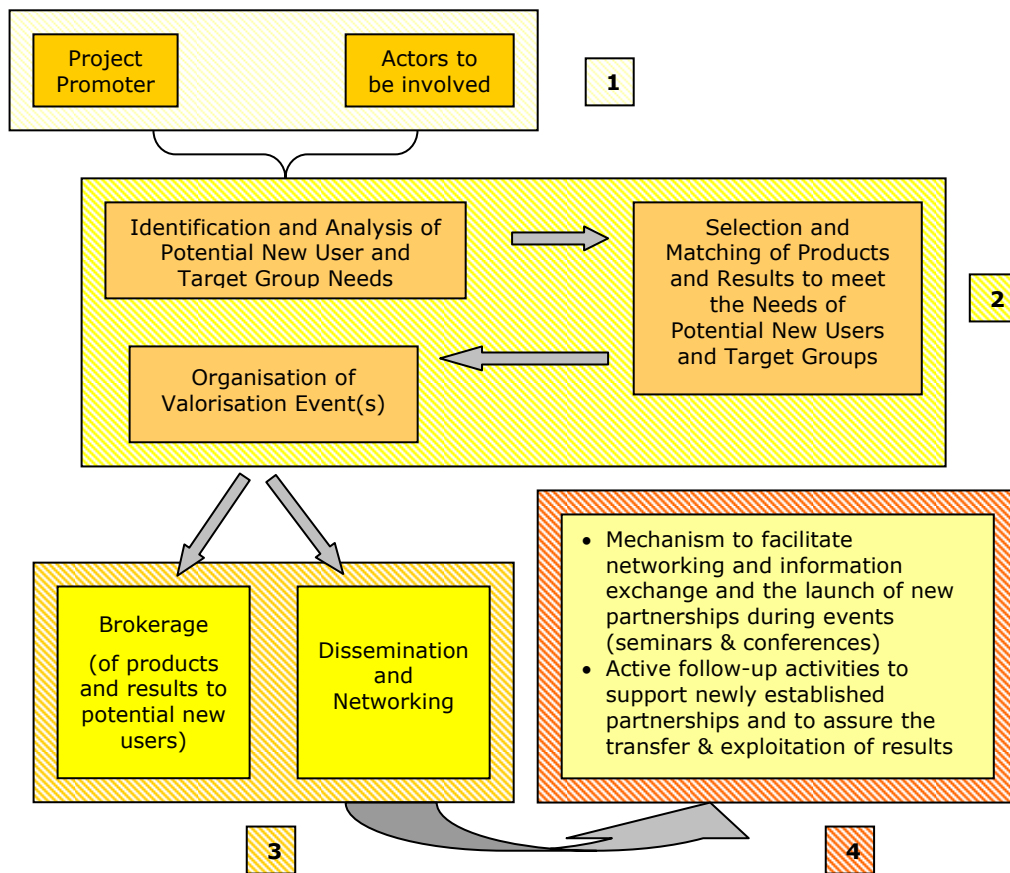
Fig. 1 – Project Structure (Valorisation Events)



This structural project analysis led to the definition of four different groups of relevant data and the formation of four assessment questions:

1. WHO was involved in terms of promoters (Contractors) and other actors (including possible partners)? (Fig. 2 - block 1)
2. WHAT were the identified needs and HOW were projects able to meet these needs? (Fig. 2 - block 2)
3. WHO was involved in brokerage, dissemination and networking activities (not only bringing projects together with potential users but encouraging interaction and exchange)? (Fig. 2 - block 3)
4. WHAT follow-up activities took place in order to assure sustainability? (Fig. 2 - block 4)

Fig. 2 – Who or what was Assessed



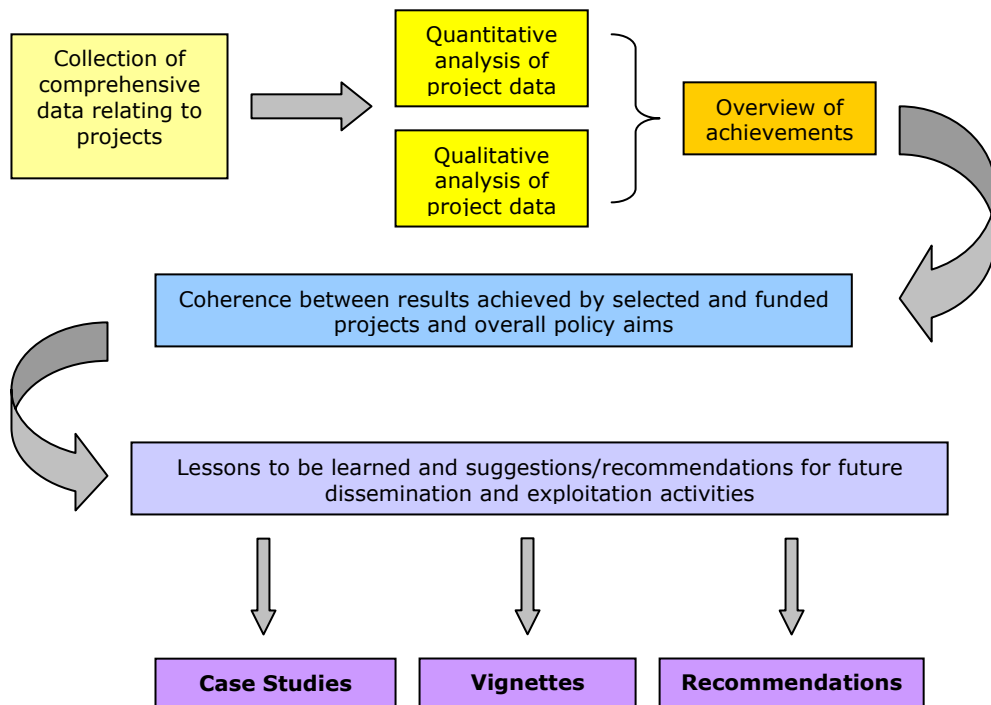
These questions were answered using both quantitative and qualitative data (obtained from comments and suggestions provided by Contractors and from surveys conducted by individual Contractors amongst event beneficiaries) and drawing on an internal interim assessment of the first 10 events undertaken by DGEAC.

1.2 Methodology

The assessment compares the performance of the selected and funded projects and the expectations of DGEAC in terms of final results (policy and Call objectives). The assessment expects to identify any need for improvement and/or re-direction in dissemination and exploitation activities and approaches for the Leonardo da Vinci programme and for other programmes managed by the Directorate-General.

An outline of the adopted methodology is provided in *Fig. 3*

Fig. 3 – Outline of Methodology



Following comprehensive data collection in relation to individual projects, two parallel analyses were undertaken. A quantitative analysis, in order to draw a picture of the context (identified needs, targeted beneficiaries, type of events, stakeholder involvement, involvement in key activities), and a qualitative analysis, presenting findings and highlighting the perspectives of Contractors and participants to be considered when designing and developing new initiatives within the framework of the future LLLP.

On the basis of the results of the above-mentioned analyses, effort was made to measure the coherence of the results of the two Calls in relation to overall policy aims. This performance analysis allowed the identification of lessons to be learned from the two experiences and a reflection on recommendations and suggestions for future activities.

As a final step, a series of Case Studies and Vignettes (examples / outlines) were identified to support the key messages in the assessment report and to provide detailed examples of actual project activity.

2. UNDERSTANDING VALORISATION

Valorisation⁶ is a French term used within the European Vocational Education and Training (VET) community to describe a process of disseminating and exploiting project learning and outcomes⁷ with a view to optimising both value and impact in new and existing contexts. It is used interchangeably with the English term 'dissemination and exploitation of results'. There are similarities in objectives and approaches with 'transfer of innovation', 'project sustainability', and 'mainstreaming'.

The texts of the two Calls for Proposals explain that, to be effective, valorisation activities should:

- focus upon end user and target group needs from the start
- disseminate innovative training products and results
- undergo the selection of products and results and analyse their suitability for transfer in order to meet identified new needs
- translate and adapt products to meet targeted new contexts
- pilot and experiment the translated / adapted products

As also stated in the two Calls, the valorisation process can take place at micro project level or at macro level, with the aim of achieving full and sustainable integration into local, regional, national and/or European training systems and practices, including via the formal certification of qualifications.

⁶ adapted from the European Commission definition provided at:
http://ec.europa.eu/education/programmes/leonardo/new/valorisation/what_en.html

⁷ training products and processes, methodology, course materials, etc.

3. SELECTION AND LAUNCH OF PROJECTS

3.1 Calls for Proposals

In 2004, the Directorate-General for Education and Culture (DGEAC) of the European Commission issued two Calls for Proposals, namely, EAC/88/03⁸ and EAC/23/04⁸ in relation to the organisation of events (conferences, seminars and exhibitions) for the exploitation of innovative results from the Leonardo da Vinci programme.

Each of the two Calls had a provisional budget of € 500.000.

Promoters were eligible to apply for a maximum of 75% co-financing, up to a ceiling of € 70.000 per project.

The Calls invited proposals⁹ able to facilitate the transfer and exploitation of innovative Leonardo da Vinci results into new situations to meet new user requirements. Priority was given to events organised on a thematic¹⁰ or sectoral basis; with good involvement of new Member States; and to events which proposed a managed approach including:

- an identification of users and analysis of user needs
- the selection of Leonardo da Vinci products to meet these identified needs
- mechanisms to facilitate contacts, exchanges, and the launch of new partnerships during the event itself
- active follow-up activities to support newly established partnerships and to assure the transfer and exploitation of results

For technical reasons, related specifically to the time period available to draw down the Call funds, both Calls imposed a relatively short maximum duration on the contracts - 10 months for the first Call, with events (conferences, seminars and exhibitions) to take place between May 2004 and February 2005; and 6 months for the second Call with events to take place in the period between September 2004 and February 2005.

A total of 90 proposals were submitted in response to the two Calls (38 proposals for the first Call and 52 proposals for the second Call).

⁸ both calls entitled "Awarding of Grants for the Organisations of Events (Seminars and Conferences) for the Exploitation of Innovative Results for the Leonardo da Vinci Programme"

⁹ in the context of Calls for Proposals EAC/88/03 and EAC/23/04, a Grant Request Form (annexes III.a, III.b, IV.a & IV.b), submitted to the European Commission, in three parts, including a detailed description of the project, a budget breakdown and a financial identification form

¹⁰ five themes were selected as a part of the Leonardo da Vinci Thematic Monitoring initiative, namely: [1] integration into the labour market; [2] development of competencies and skills within companies (SMEs); [3] adaptation of the training supply and new training methods – quality of training; [4] transparency, assessment and validation of knowledge and [5] e-learning

Building upon the experience of the first Call, the second Call was slightly amended to give increased emphasis with regard to the identification of new user needs; subsequently the original grant request form was revised to provide enhanced information during the evaluation and selection phases.

3.2 Evaluation of Proposals

Evaluation and selection procedures were managed by DGEAC following the approach for the evaluation of Leonardo da Vinci Procedure B & C proposals (registration, eligibility check, evaluation, scoring, selection committee, decision), adapted to take account of the requirements of each Call.

Of the 38 proposals submitted in response to the first Call, 11 proposals (29%) were deemed ineligible due to the fact that the requirements of the Call had not been met (including 3 projects which proposed only one product for valorisation).

The second Call had slightly less ineligible projects with 13 out of 52 proposals deemed ineligible (25%).

The evaluation of projects was undertaken internally at the European Commission, with evaluators selected from both DGEAC and DGENR (Directorate-General for Enterprise and Industry). A common briefing was held by DGEAC in order to explain the content and objectives of each Call to all evaluators and to present and discuss the evaluation procedures (annexes V & VI).

Each proposal was evaluated twice on the basis of a number of selection and award criteria as set out in the text of the respective Call with proposals being awarded the average score. The award criteria were transposed into an evaluation grid (annexes V & VI) for use by evaluators. Where there were significant discrepancies in evaluation scores a third evaluation was undertaken.

Feedback after the first Call indicated that the original evaluation grid (annex VII) was too detailed given the level of information requested and provided in the application forms. The evaluation grid was therefore modified (annex VIII) in advance of the evaluation of proposals resulting from the second Call (evaluation criteria were reduced from 17 to 10 and scoring was simplified).

Selection Committees were held on 31 March 2004 and 23 July 2004 following each respective Call and involved all European Commission staff involved in the evaluation exercise. In each case, a quality threshold for the selection of projects was agreed at the start of the meeting (e.g. in relation to the first Call, out of a potential score of 340 the quality threshold was 170 representing 50%. Projects awarded an

average rating of less than 170 were thus rejected on the basis of a low quality proposal).

Following the Selection Committees, proposals were ranked in order of score and all proposals scoring above the agreed quality threshold were considered for funding (highest rated projects proposed for funding within the limits of the available budget; remainder of projects held on the reserve list).

Grant recommendations for selected proposals were then passed to the DGEAC Authorising Officer (Director) for a decision. Call results were subsequently submitted to the Leonardo da Vinci Committees for information in April and September 2004 respectively.

3.3 Selected Projects

The first Call (EAC/88/03) resulted in 9 projects being funded (33% of submitted and eligible proposals) with a total award value of € 534.046.

| Reference | Contractor | Country | Grant |
|-----------|--|---------|---------|
| 2004-1044 | Handwerkskammer Muenster | DE | € 69903 |
| 2004-1057 | Research Liaison Office - University of Iceland | IS | € 65876 |
| 2004-1144 | Verband Sächsischer Bildungsinstitute EV VSBI (Leipzig) | DE | € 63187 |
| 2004-1207 | The Prince's Trust | UK | € 41240 |
| 2004-1055 | EU Leonardo da Vinci Programme Coordination Support Foundation | LT | € 37500 |
| 2004-1208 | Association Interrégionale de Guidance et de Santé (AIGS) | BE | € 69918 |
| 2004-1250 | National Agency Leonardo da Vinci (SAAIC) | SK | € 51338 |
| 2004-1251 | Giunta Regionale Toscana | IT | € 69914 |
| 2004-1848 | Militos Emerging Technologies & Services | EL | € 65170 |

The second Call (EAC/23/04) resulted in 10 projects being funded (26% of submitted and eligible proposals) with a total 'contractual' value of € 544.305.

| Reference | Contractor | Country | Grant |
|-----------|--|---------|---------|
| 2004-2606 | Nationale Agentur - Bildung für Europa beim BIBB (Bonn) | DE | € 69986 |
| 2004-2612 | Fundacja Rozwoju Demokracji Lokalnej | PL | € 51431 |
| 2004-2691 | Leonardo da Vinci Nationalagentur Österreich | AT | € 38024 |
| 2004-2609 | allWeb Solutions S.A. | EL | € 68350 |
| 2004-2603 | Foundation for Lifelong Learning Development Innove | EE | € 59914 |
| 2004-2604 | Centre Forestier | FR | € 59038 |
| 2004-2605 | European Vocational Training Association (EVTA) | BE | € 50000 |
| 2004-2607 | Prolepsis - Institute of Preventive Medicine | EL | € 50170 |
| 2004-2611 | Leonardo NCU Norway / Teknologisk Institutt | NO | € 69989 |
| 2004-2693 | National Training Fund / Public Benefit Organisation (Czech Leonardo NA) | CZ | € 27403 |

Overall, 19 projects were selected from a total of 80 proposals submitted in response to both Calls. The success rate of the first Call was 24%, which was slightly higher than the success rate of the second Call (19%) although the second call had a further 15% of projects held in a reserve list.

There are three important figures to consider when we look at the funding of the 19 projects. Firstly there is the award value of € 1.078.351 which reflects the formal offer of Community funding made to the 19 promoters and which already constitutes an increase of 7.8% to the indicative budget of € 1.000.000. Secondly, there is the contract value, further taking into account all contractual amendments, of € 1.078.372 which shows an increase of € 21 compared to the original award. Lastly, there is the actual cost of the 19 projects, according to the final financial assessment, of € 909.328 representing 91% of the indicative budget and only 84% of the maximum contractual value. As is quite often the case with Community funding, the eventual cost is lower than awarded and contracted amount, reflecting both underspending and ineligible (thus non-funded) expenditure by the majority of projects.

For projects contracted under the first Call the eligibility period began on 1 May 2004, with contracts being signed in June 2004.

For projects resulting from the second Call the eligibility period began on 1 September 2004. Eight contracts were signed during September, one in October and one in November 2004.

3.4 Launch Meetings

Each Contractor was invited to attend a launch meeting in Brussels to ensure that they fully understood the Commission's expectations and requirements for the events and also to facilitate networking and problem-solving amongst projects. Participants valued these launch meetings which allowed the opportunity to meet with European Commission colleagues and to discuss the content of their project at the inception stage.

For the first Call, launch meetings took place on 28 May and 9 June 2004 (meetings were organised at relatively short notice in line with DGEAC and individual Contractor availability). For the second Call a single launch meeting took place on 29 September 2004.

4. PROJECT DESCRIPTIONS

The 19 projects funded under the two Calls are briefly described below.

4.1 EAC/88/03

Handwerkskammer Muenster (2004-1044) Modularisierung - Improving the Transparency & Recognition of Qualifications in Germany

The Modularisierung (adaptation) project aimed to promote increased transparency and recognition of qualifications in Europe for which a two-day Conference was held in Münster (DE) in October 2004, attracting a wide range of participants, including decision makers, actors in VET and Leonardo da Vinci project promoters. The Conference allowed for discussions with stakeholders on the subject of modular training and further presented the outcomes of a number of previously-funded Leonardo da Vinci projects (including a project on the Transnational Development and Testing of an Occupational Preparation Model in the Motor Vehicle and Metal Sectors). Conference proceedings and key results are presented, in DE, via a dedicated project website.

<http://www.hwk-muenster.de/index.php?id=507>

Research Liaison Office - University of Iceland (2004-1057) Achieving Success - Catching the Past, Promoting the Future (Back on Track)

The Back on Track project aimed at addressing identified gaps in public policy and in the capacity of guidance and education systems to actively reduce the level of educational drop-out and to support the integration / re-integration of drop-outs into education and the labour market. The project identified potentially transferable Leonardo da Vinci project results in this area to bring together at a two-day Valorisation Conference held in Reykjavik (IS) in October 2004. The Conference was felt to be a key step to bridging policy and practice and bringing together key stakeholders to allow detailed discussion on the theme of educational dropout and reintegration.

www.backontrack.info

Verband Sächsischer Bildungsinstitute EV VSBI – Leipzig (2004-1144) European Teletutor

The European Teletutor project aimed to promote and exploit the results of several previously-funded Leonardo da Vinci projects focusing upon e-learning and e-commerce. A two-day Conference was held in Leipzig (DE) in November 2004 promoting the role of the 'European Teletutor'. The Conference allowed an exchange of experience amongst primarily VSBI members and partners and presented a number of train-the-trainer and tutor instruction programmes, highlighting the need for tutors and teachers to recognise the possibilities provided by newly developed learning software.

The Prince's Trust (2004-1207)
Maximising the Learning: The Use of Learning Materials and Formal Recognition for Disadvantaged Young People undertaking European Work Placements

The Prince's Trust organised the Maximising the Learning Conference in Kinross (UK) in September 2004. The Conference allowed an exchange of best practice in the preparation of (disadvantaged) young people for overseas experience, the dissemination of existing learning materials in relation to European mobility and the adaptation of learning materials for use in a variety of new learning scenarios and/or new countries. Individual workshops were held as a part of the Conference to go beyond dissemination towards the adaptation and transfer of existing methods and materials.

EU Leonardo da Vinci Programme Coordination Support Foundation (2004-1055)
Transparency and Recognition of Qualifications: Challenges and Perspectives for New Member States

In promoting the valorisation of Leonardo products & results from new Member States, particularly those addressing the Transparency of Qualifications, a two-day Valorisation Conference was held in Vilnius (LT) in October 2004. The Conference initially presented an overview of the current situation relating to Transparency in the new Member States, including reflections on recent Europass changes and subsequently hosted a series of individual workshops on key Transparency issues (recognition of qualifications for academic & professional purposes; comparability of vocational qualifications; validation of learning; development of transparency instruments). The project also aimed to increase transnational cooperation in the area of Transparency through the networking of Leonardo da Vinci National Agencies.

Association Interrégionale de Guidance et de Santé –AIGS (2004-1208)
Prom' Events

The aim of the Prom' Events project was to present the results of the previously-funded PEGASE, JOCANDA & JOCASTE projects to potential users in the 10 newly-acceded EU Member States (EE, CY, CZ, HU, LT, LV, MT, PL, SI & SK). The selected projects focused upon training provision and labour market integration for disabled persons and other disadvantaged groups, for which the project initially undertook an analysis of training needs in order to assess the potential for transfer of the selected project results. The overall aim of the project was to both transfer and embed project results into existing VET systems in the target countries. The project held two Valorisation events in Krakow (PL) and Nicosia (CY) in October 2004 and January 2005 respectively.
www.aigs.be/promevents.htm

**SAAIC - National Agency Leonardo da Vinci (2004-1250)
Transfer of Innovative VET practices across Europe**

This project, organised by the Leonardo da Vinci National Agency in Slovakia, aimed to promote the dissemination and exploitation of products and processes resulting from innovative Leonardo da Vinci projects and to facilitate the transfer of these results to potential users. A showcase event, comprising an exhibition and conference, was held in Bratislava (SK) in October 2004, which encouraged interactive exchanges amongst project promoters, potential new users, decision makers, VET actors and Leonardo da Vinci National Agencies. The event was devoted to three key themes, namely, Quality in VET; Transparency, Recognition and the Assessment of Learning and Skills and Vocational Guidance. <http://www.saaic.sk/transfair/>

**Giunta Regionale Toscana (2004-1251)
Focus on Competences - Description, Classification and
Recording of Competences: Comparing National Systems and
European Experiences**

The Focus on Competences project addressed the theme of recognition, transparency and certification of competences, taking into particular account the evolving situation of the host country (Italy). A two-day Conference was held in Florence (IT) in January 2005 which provided an overview of current practice across Europe which also provided participants with examples of new practices and methodologies in the area of skills recognition. Primary target groups for the project were policy and decision makers in addition to actors involved in the development of certification systems.

www.rete.toscana.it/sett/orient/fp/focus/index.html

**Militos Emerging Technologies & Services (2004-1848)
Journalists Discover Leonardo da Vinci**

Militos in conjunction with a number of national, European & international journalism associations, identified and promoted the ongoing dissemination and potential exploitation of products and processes resulting from 7 previously-funded Leonardo da Vinci projects, the majority of which focused upon Journalism and/or Digital Media. A one-day Conference was held in Athens (GR) in September 2004, participants at which represented journalism bodies from 6 European countries. Militos, in its role as Contractor, continues to work with the established user networks to further encourage the sustainability of current and future Leonardo da Vinci project results in the sector.

4.2 EAC/23/2004

Nationale Agentur - Bildung für Europa beim BIBB – Bonn (2004-2606)

[1] Health and Social Care Occupations - Impulses in European Innovation Projects

[2] The Future of Vocational and Continuous Education & Training in the Tourism Sector

This project, organised by the Leonardo da Vinci National Agency in Germany, focused upon the presentation and exploitation of successful Leonardo da Vinci project results. Two one-day conferences were held in Germany in Eibsee (January 2005) and Bonn (March 2005), focusing respectively upon the Tourism and Health & Social Care sectors. Featured projects were selected according to four key criteria (innovation, addressing sectoral needs, product quality and transfer potential) with the focus being to exchange experience and to further disseminate project results to potential stakeholders. Conferences were attended by social partners, training bodies, decision makers and potential end users in the field of VET.

Fundacja Rozwoju Demokracji Lokalnej (2004-2612) Agents for Local Development: New Tools and Strategies in Warmia and Mazury

The Agents for Local Development project presented a number of identified good practice Leonardo da Vinci projects in the field of local development via a series of local Conferences (2) and Workshops (6). The aim of the project was to present examples of good practice, development models and a new job profile (Local Development Agent) for use in enhancing opportunities for employment in two Polish regions (Warmia & Mazury) where the rate of unemployment is particularly high and where young people in particular experience problems in labour market integration.

Leonardo da Vinci Nationalagentur Österreich (2004-2691) Leonardo da Vinci Marketplace-New Training Products for SMEs

Leonardo da Vinci Marketplace presented project results and outcomes from AT, CZ, DE, HU & NO (the participating countries) to a range of potential users (SMEs, education and training organisations) and beneficiaries. To achieve this, a one-day Conference was held in Vienna (AT) in November 2004, whereupon potential users could familiarise themselves with Leonardo da Vinci results with the longer term aim being to increase usage within target sectors and by target groups. The Austrian Leonardo da Vinci National Agency, in its role as Contractor, intends to continue work with the established user networks to further encourage the sustainability of Leonardo da Vinci projects results.

www.leonardodavinci.at/article/articleview/402/1/7/

allWeb Solutions S.A. (2004-2609)
E-learning and Acquiring New Skills - The New Way of Learning

Focussing upon e-Learning, this project hosted a Conference Roadshow with three events taking place in Athens, Vienna & Sofia between February and April 2005. Each of the three events focussed upon the promotion and exploitation of the Leonardo da Vinci project results. Four projects were selected for their focus upon e-learning and their ability to demonstrate the potential for e-Learning for the identified target groups (for Athens & Sofia these were SMEs considering e-Learning to enhance existing knowledge & skills levels and HR managers interested in viewing new e-learning methods & tools; for Vienna the target group were Training Practitioners considering use of the developed e-Learning curricula). Each of the 3 Seminars had a unique topic namely, SME Training Needs and Methods for Developing Flexible, Customised e-Learning Solutions (EL), Complete e-Learning Solutions for SMEs (BG) & Quality in Training and Certification of Skills - Knowledge Acquired through e-Learning (AT).

www.newway2learn.org

**Foundation for Lifelong Learning Development
Innove (2004-2603)**
**Recognition of Competencies: Innovative Ideas, Tools &
Approaches to Vocational Training and Documentation of
Competencies for Nordic-Baltic and European Integration**

The Estonian Leonardo da Vinci National Agency, along with seven other National Agencies from the Nordic and Baltic countries, organised a Conference focusing upon 'Transparency and the Mutual Recognition of Education & Training' and the 'Assessment & Documentation of Non-formal and Informal Knowledge & Skills'. The Conference was held in Tallinn (EE) in January 2005, with the aim of exploiting innovative products and practices resulting from international cooperation in VET, encouraging the valorisation of Leonardo da Vinci project results, stimulating networks between VET actors from different countries, strengthening the process of integration between Nordic and Baltic countries and, more generally, exchanging approaches and experiences with regard to valorisation.

www.innove.ee/itr/

Centre Forestier (2004-2604)
First International Forestry Training Centres Conference

This project allowed VET stakeholders in the forestry sector to come together, on an international level, for the first time. The overall aim of the project was to contribute to enhanced training opportunity within the forestry sector. An International Conference was held in La Bastide des Jourdans (FR) in February 2005 during which 4 previously-funded Leonardo da Vinci projects, specific to the forestry sector, were presented to participants, which included social partners, sectoral representatives and VET actors.

www.eduforest.org/index1.php?page=4

**European Vocational Training Association – EVTA (2004-2605)
A Gallery of Leonardo Projects: Presentation of Projects and
Lessons to be Learned**

The European Vocational Training Association organised this project to disseminate the knowledge gained throughout their member organisations, in particular focusing upon successful experiences in relation to the Leonardo da Vinci programme. A two-day Conference was held in Budapest (HU) in February 2005 targeted primarily at policy and decision makers and VET practitioners during which EVTA member projects were presented and reviewed in relation to innovation and potential transferability.

http://www.evta.net/conference/budapest_20050224/index.asp

**Prolepsis - Institute of Preventive Medicine (2004-2607)
Disparities in Public Health Training in the European Union:
Tools for Harmonisation**

This project aimed to raise public awareness with regard to disparities in public health training in Europe, to disseminate knowledge, products & tools resulting from Leonardo da Vinci projects and to propose methodology for the harmonisation of training in public health and health related professions across the EU. A two-day Conference was held in Athens (EL) in January 2005, during which 10 related projects were presented to key stakeholders (policy & decision makers, VET actors) & potential new users. Conference proceedings are presented via a dedicated project website.

www.healthtraining-eu-conf.gr

**Leonardo NCU Norway / Teknologisk Institutt (2004-2611)
European Quality in Mobility Award**

Focussing upon the mobility measure of the Leonardo da Vinci programme, this project launched the European Quality in Mobility Award which is now an annual award given by Leonardo da Vinci National Agencies. The project brought together 8 Leonardo da Vinci National Agencies to highlight the importance of Quality in VET with particular regard to vocational mobility. Projects were nominated from 27 European countries and reduced to a final 20 selected projects, for which a showcase video was produced, following a period of intense jury selection. A two-day Conference was held in Oslo (NO) in January 2005 which brought together award-winners with new or potential Leonardo da Vinci Mobility project promoters (and other relevant stakeholders) in order to network and share experiences.

www.teknologisk.no/leonardodavinci/

**National Training Fund / Public Benefit Organisation - Czech
Leonardo NA (2004-2693)
Agriculture-Training-Europe**

The Agriculture-Training-Europe project raised awareness of the Leonardo da Vinci programme through presenting best practice projects, specific to the Agriculture sector and through promoting an exchange of information and knowledge amongst stakeholders (VET professionals, social partners, decision makers, project promoters) at both European and sector level. A two-day Conference was held in Prague (CZ) in January 2005 at which more than 100 participants were present including key stakeholders from the Agriculture sector. A study on VET in the EU Agri-Food Sector was also commissioned with results presented during the Conference.

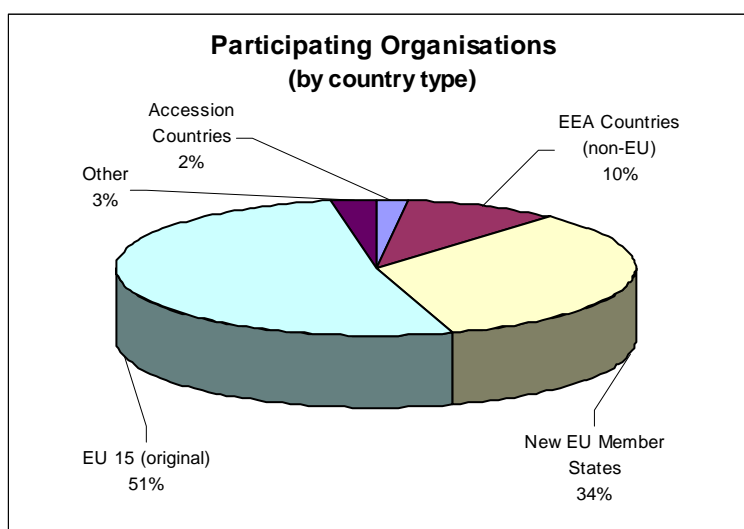
www.nvf.cz/leonardo/publications.htm (*publications for download*)

5. QUANTITATIVE ANALYSIS

5.1 Participating Organisations

Analysing the Contractor and partner organisations, we can see that the EU-15 Member States represented 51% of *participating* organisations, closely followed by new EU Member States (34%). Other (3%) includes participants from European organisations and from Switzerland.

This distribution is repeated when we look at the countries *leading* these projects; the EU-15 Member States represent 58% of Contractors, followed by the new EU Member States (26%).



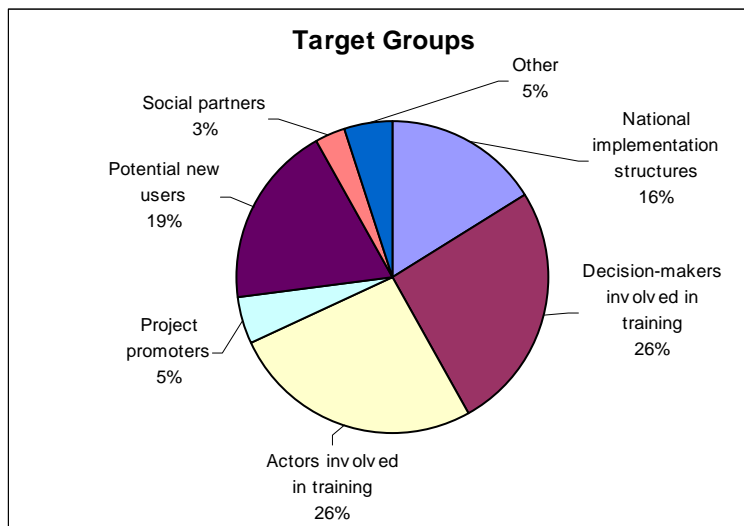
This confirms a recognised trend for the Leonardo da Vinci programme in the fact that new EU Member States not only participate but act increasingly as leaders in European VET projects. This also supports a requirement of the two Calls for the active involvement of organisations and participants from 'candidate' countries¹¹.

5.2 Target Groups

According to the proposals received from the 19 funded projects, all promoters were easily able to identify with the target groups listed in the two Calls, this is evidenced in the fact that the majority of projects felt that they could meet the needs of, and subsequently selected, in their proposal, all or the majority of the potential target groups¹². In the final analysis of the 19 funded projects, it was therefore felt necessary to identify the two primary target groups for each project.

¹¹ now the EU-10 Member States; and remaining accession countries

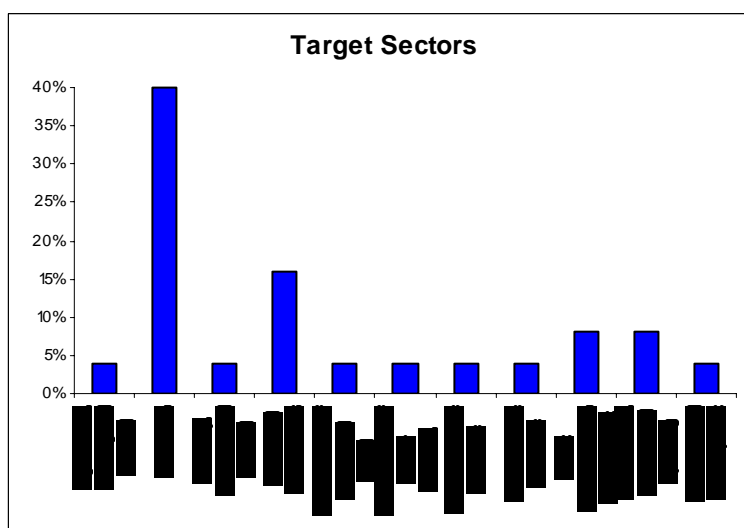
¹² Target groups comprised: national implementation structures; decision-makers involved in training; actors involved in training; project promoters; potential new users; final beneficiaries; social partners; others



From this breakdown of primary target groups we can see that influential bodies (decision makers, implementation structures, social partners) and VET practitioners (potential new users, actors involved in training) each represent 45% whereas project promoters only represent 5% of the target audience. This division of roles is further supported when we look at the division of 'event participant' types (data was provided in relation to 25 of the 30 events) which averaged 80% for non-promoters and 20% for current or ex- Leonardo da Vinci promoters, which roughly translated, means that for each project showcased there were 4 potential new users present. Other target groups (5%) included Guidance and Counselling Practitioners and SMEs.

5.3 Target Sectors

A wide range of target sectors were selected across the 19 projects, from Agriculture and Forestry to Manufacturing and Service Activities. The lead sector however was Education confirming a general trend for the Leonardo da Vinci programme in targeting generic and non-sector specific education and training bodies.



5.4 Main Activities Undertaken

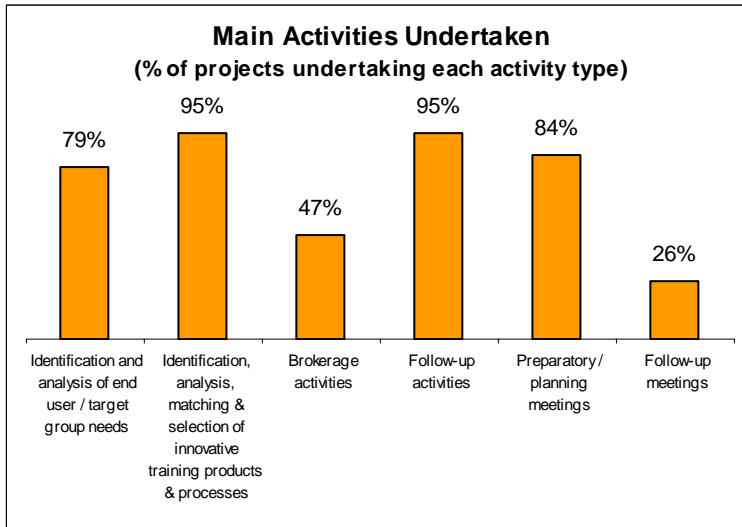
A series of key activities were outlined in the two Calls, namely:

- the identification and analysis of end user/target group needs (*according to final project reports, this was carried out by 79% of projects during the project lifetime, other projects claim to have undertaken this activity in advance of submitting their proposal*)
- the identification, analysis, matching and selection of innovative training products and processes (*according to final project reports, undertaken by 95% of projects*)
- brokerage activities to ensure maximum impact from the proposed event/s (*47% of projects claim, in their final report, to have undertaken brokerage activities although there appear to be different levels of understanding as regards what such activity should comprise c.f. section 6.3 of this assessment report*)
- follow-up activities to assure sustainability of the 'valorised' products and processes (*according to final project reports, undertaken by 95% of projects*)

With regard to planning and follow-up meetings, whilst a large number of projects held preparatory meetings¹³ (84%) there were significantly fewer follow-up meetings held (26%), this is supported by comments from Contractors advising that they were unable to hold additional or follow-up meetings due to a lack of remaining funds or to the fact that the project eligibility period had ended. The short duration of the contracts was a contributing factor here. This feedback was considered in the preparation of a third Call in 2005 for the organisation of events (conferences, seminars and exhibitions) for the exploitation of innovative results from the Leonardo da Vinci programme (EAC/92/04). This third Call required that 30% of project budgets be used to finance follow-up activities and further established a deadline for the hosting of events in order to ensure sufficient time remained for follow-up activities. A fourth Leonardo Call EAC/21/06¹⁴ repeats the same formula and further allows a maximum contract duration of 18 months. Beyond this, the recent Call for Proposals for the Awarding of Grants for Dissemination and Exploitation Activities (conferences / seminars) for the Exploitation of Results from Socrates projects (EAC/12/06) required that 10-20% of project budgets and the final 2-3 months of all projects be dedicated to follow-up activities.

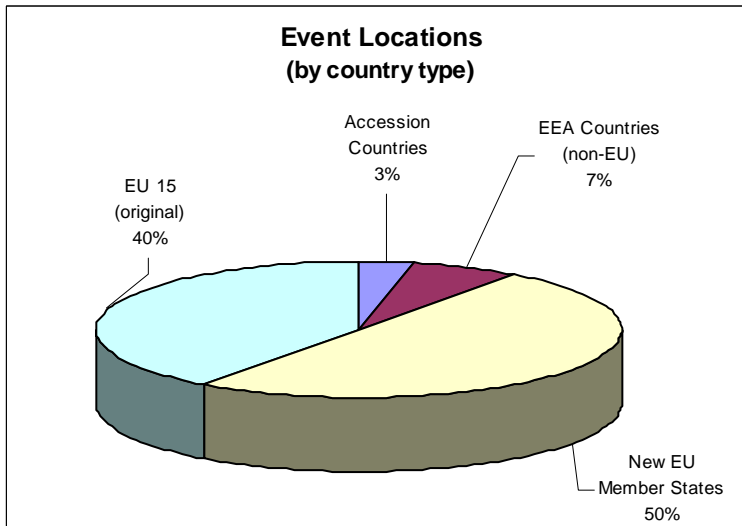
¹³ planning meetings held in advance of the valorisation event/s involving formal and non-formal project partners and where necessary relevant stakeholder representatives

¹⁴ Open Call for Proposals DG EAC/21/06 concerning the Award of grants for activities (conferences, seminars) to exploit and disseminate the results of Leonardo da Vinci projects [published on 08.06.2006 with a deadline for the submission of applications of 10.07.2006



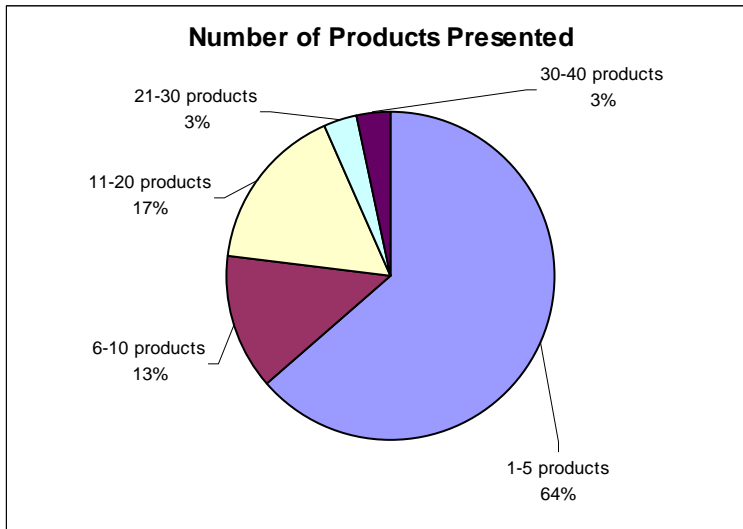
5.5 Event Locations

It is interesting to note that of the 30 events held under the 19 projects, the majority (50%) of these took place in EU-10 Member States. Whilst many factors could have influenced this (economic factors, transfer factor) the analysis shows that one project held a series of 7 events in its own country (new EU Member State) which heavily influences the results. Closer analysis shows that 84% of projects held events solely in the Contractor country. Remaining projects held the event in a partner or member country (EVTA), held events in more than one country (allWeb Solutions) or had a particular project focus upon the new EU Member States which dictated that events were held in these countries (AIGS).



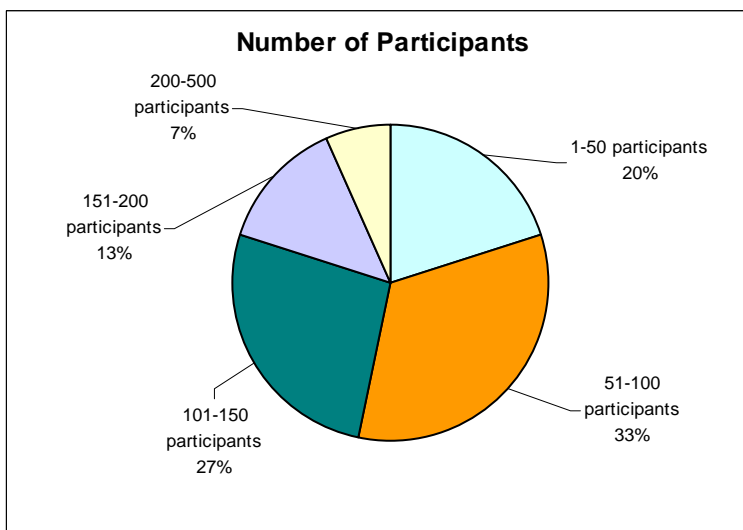
5.6 Number of Products Presented

The two Calls outlined the need for projects to provide a showcase for a number of successful Leonardo da Vinci products and processes. From the data provided, it appears that projects focused more upon the quality than the quantity of projects with 77% of projects showcasing 10 products or less and only 6% of projects presenting more than 20 project results. In at least one instance (Centre Forestier project), the small number of projects presented also reflected the limited number of previous Leonardo da Vinci projects addressing the sector concerned.



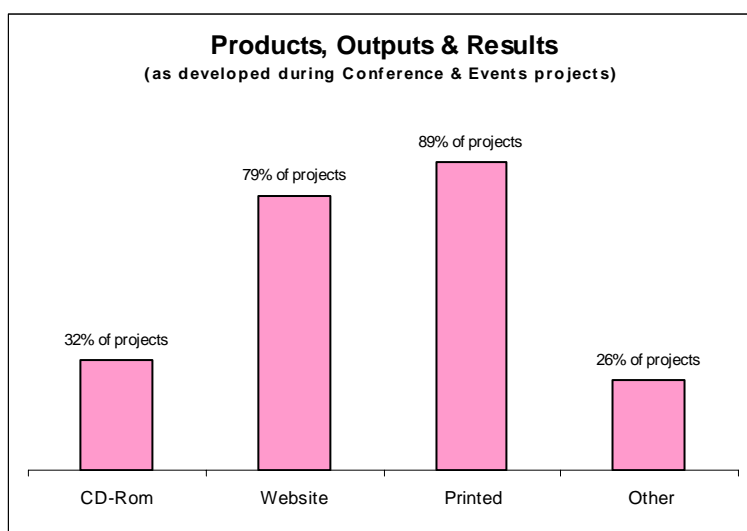
5.7 Number of Participants

Numbers attending varied from 14 participants (smaller workshop-style events) to 412 participants (regional / national event involving policy & decision makers) however only 20% of events involved more than 150 participants. The total number of participants across the 30 events was 3263.



5.8 Products, Outputs & Results

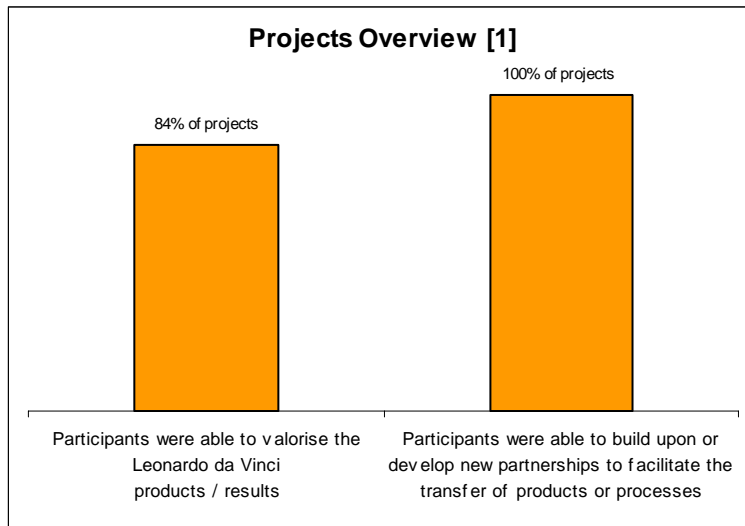
Here we consider the outputs and results of the 19 funded projects and not those of the individual projects selected for valorisation. The largest group of outputs were printed materials, which reflects a rather traditional approach to the marketing of events and the subsequent production of conference proceedings. Also worthy of noting is the fact that 15 of the 19 projects had a web presence either during or following the hosting of their respective events. Websites were used as event promotion and registration tools, as networking platforms (with a focus upon sustaining the established networks) and as a vehicle for hosting the project results. Other products (26%) included certificates of attendance, a project compendium and a sector-based study.



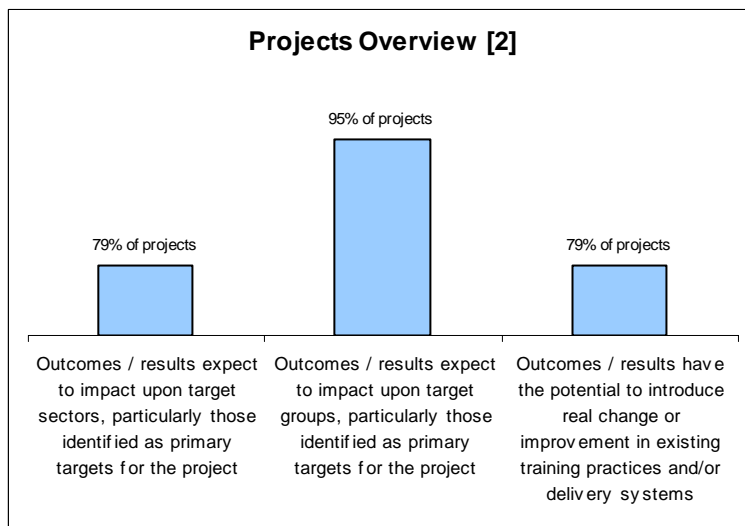
5.9 Projects Overview

In summary, the networking of projects, new users and decision-makers was felt to be a success in all 19 projects (judged 100% successful both by the Contractors and by end project assessors¹⁵). In relation to the ability of participants to fully valorise the results, again according to the end project assessors, the success factor was marginally less at 84%.

¹⁵ end-project assessment focused primarily upon whether the project had been delivered according to what was foreseen and contractually agreed

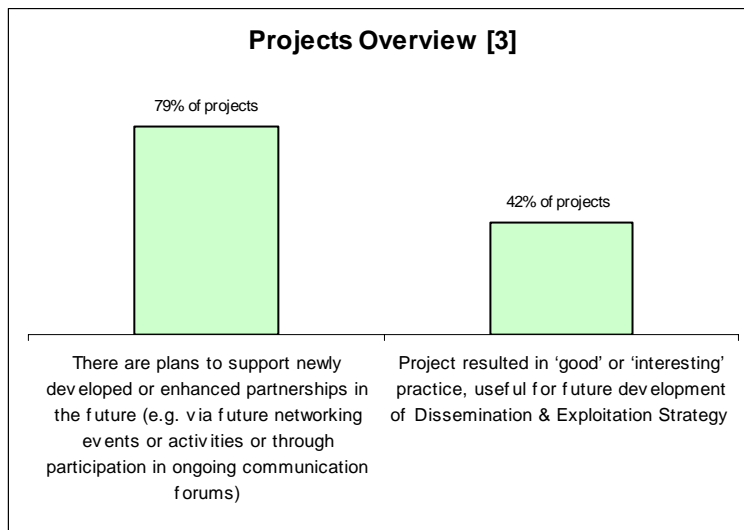


From the point of view of the end project results, an impressive 95% of projects stated in their Final Report that they expect to impact upon the identified target groups. According to the same data, lesser, but no less significant success is considered with regard to expected impact upon the target sectors (79%) and with regard to the potential for change in existing training practices and/or delivery systems (79%). It should be noted however that projects were required to report within two months following the end of their project and, as such, longer-term impact was not fully considered, nor was there a contractual requirement for them to report on this at a later stage.



Considering an increasing requirement upon Contractors to assure the sustainability of project results, 4 out of 5 projects report plans to continue their activities in some way, either in the form of continued networking (Leonardo da Vinci Nationalagentur Österreich; Militos Emerging Technologies & Services) or in the form of a repeat exercise beyond the project lifetime (Leonardo NCU Norway-National Institute of Technology; Centre Forestier).

If we consider innovative or interesting approaches adopted by the Contractors, the results are less positive with only 42% of projects judged, by end project assessors, to have resulted in 'good' or 'interesting' practices for the development of future dissemination and exploitation strategies. Bearing in mind the experimental nature of the Calls, which were aimed at promoting and testing new approaches to the exploitation of project results, this seems an acceptable outcome.



6. QUALITATIVE ANALYSIS

The qualitative analysis of projects will focus mainly upon three elements:

1. the typology of events implemented within the framework of the two Calls and the different understanding of the concept of valorisation visible through the structure of the valorisation event
2. the methodologies used to identify both potential end users/target groups and projects to be presented during the valorisation events
3. the range of brokerage¹⁶ and follow-up activities undertaken in order to assure sustainability

6.1 Typology of Events

As a whole, valorisation events organised within the framework of the two Calls are very different as far as themes (transparency and the mutual recognition of education & training, integration/re-integration of drop-outs into education and the labour market, e-learning and e-commerce, local development, recognition, transparency & certification of competences, forestry, public health training, ...), stakeholders involved, and number of projects presented, are concerned.

However, some general trends can be detected when analysing the characteristics of these events. In particular, we can divide valorisation events into three major categories:

1. large scale general interest conferences (sometimes including an exhibition of projects)
2. thematic and/or sectoral conferences
3. restricted or focused events¹⁷

The first event type (large scale conferences) is oriented more to emphasising the outcomes of projects and less towards the actual needs of potential user groups. Whilst high numbers of relevant stakeholders participated in these valorisation events (including local, national, and European decision makers), the matching between projects and potential users appears weaker than in other types of event and brokerage seems to have relied upon the pro-activeness of project presenters rather than being a strategic or planned activity.

Examples of large scale conferences include the Transfer of Innovative VET Practices across Europe (2004-1250) and Leonardo da Vinci Marketplace - New Training Products for SME's (2004-2691) projects.

The second event type (thematic/sectoral conferences) focused more on thematic questions with the direct exchange of products (including brokerage activities) being consequential.

¹⁶ an activity involving an external or third party able to act as an intermediary between two other parties

¹⁷ refer to page 25 of this assessment report (§ 5.7 *Number of participants*) for further information on the number of participants in valorisation events

Events focused more upon policy and strategy with project results used as source material and as examples to support the key messages and theme of the valorisation event.

Examples of thematic or sectoral conferences include the Focus on Competences (2004-1251) and Back on Track (2004-1057) projects and the dual-event project managed by the German Leonardo da Vinci National Agency (2004-2606).

The third category of events (restricted or focused events) took place more at a regional or local level and showed a real attempt to matching theme, projects and audience. Brokerage and follow-up activities were simpler and more effective.

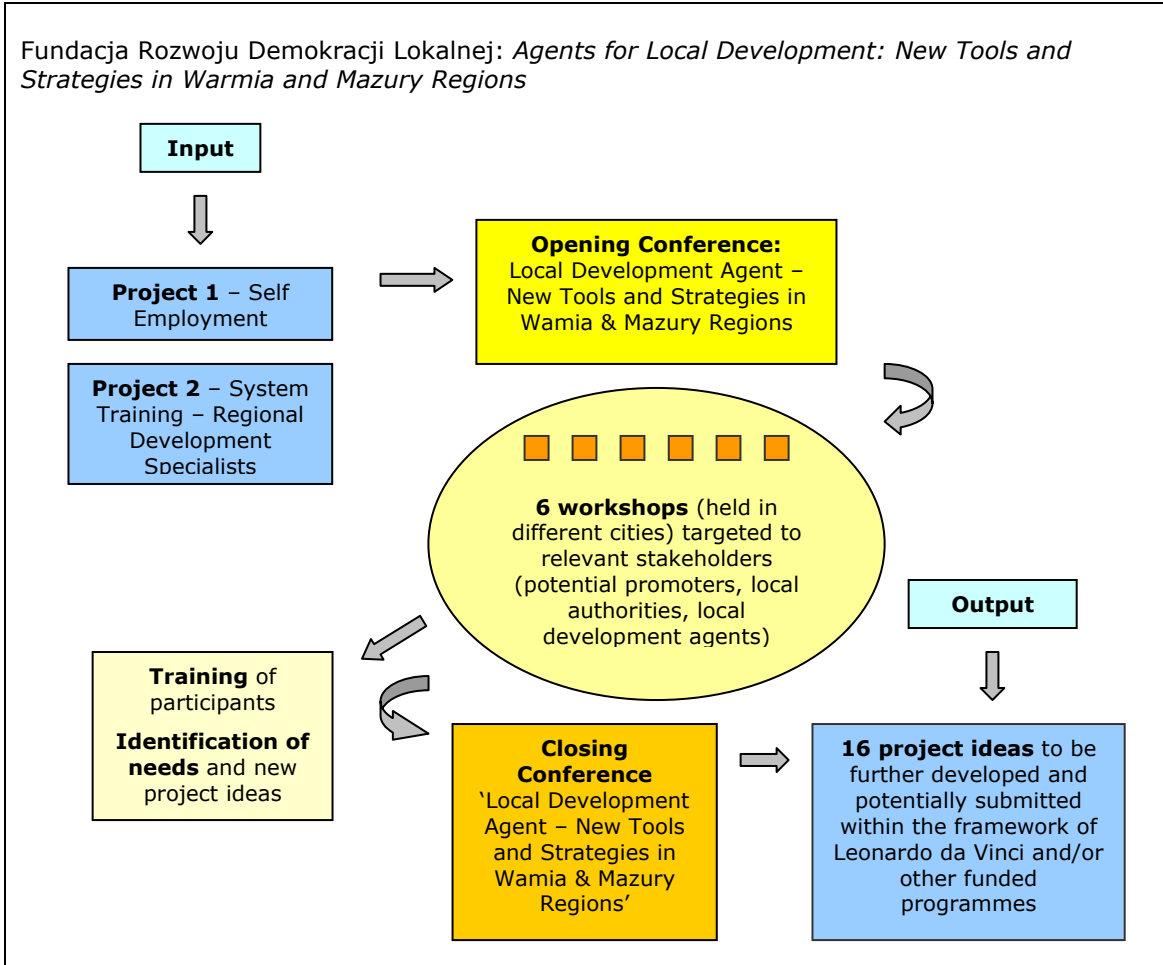
Examples of restricted or focussed events include the Prom' Events (2004-1208), Journalists Discover Leonardo da Vinci (2004-1848) and Agents for Local Development (2004-2612) projects.

The structure of events (in each category) was based mainly on three elements: a general conference based on the intervention of invited speakers and project promoters (depending on the event), parallel workshop sessions (discussing specific topics relating to the main theme of the event), and in a few cases a project exhibition (in one case¹⁸, the exhibition of projects was not part of the project but was organised at the same time and focused – more or less – on the same theme).

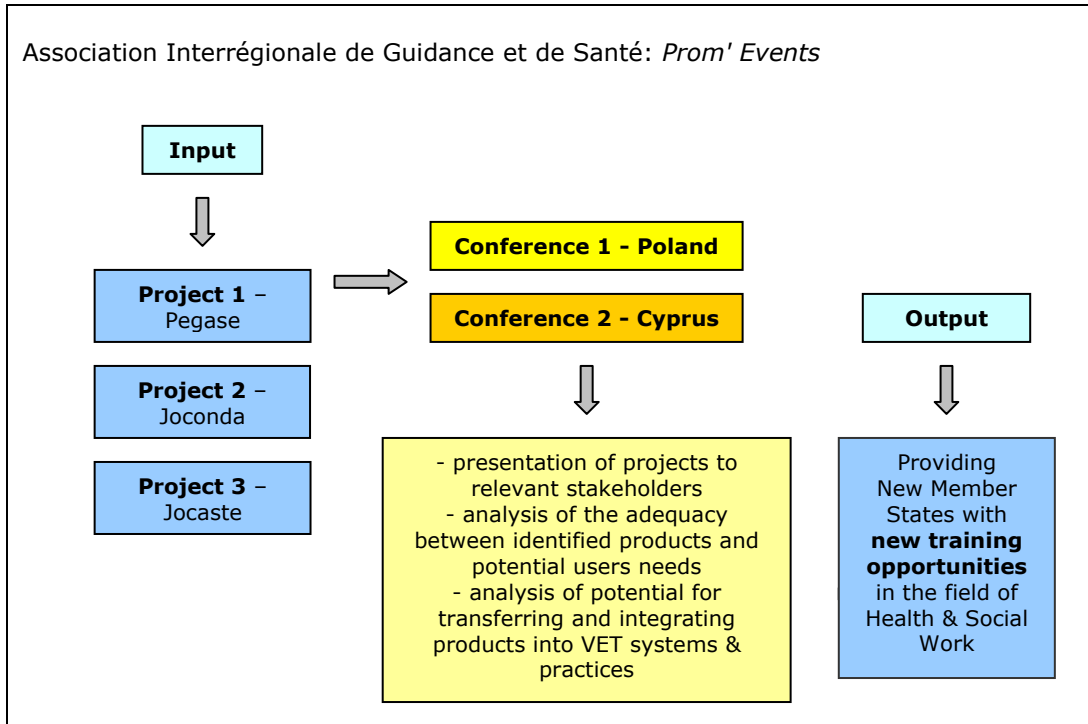
The structure of events, however, relies upon the understanding of the Contractor as regards valorisation events. Different projects evidence different ways of organising events thus showing that the concept of valorisation was understood quite differently.

In the boxes that follow, there are three examples of events each having a different understanding of the valorisation concept.

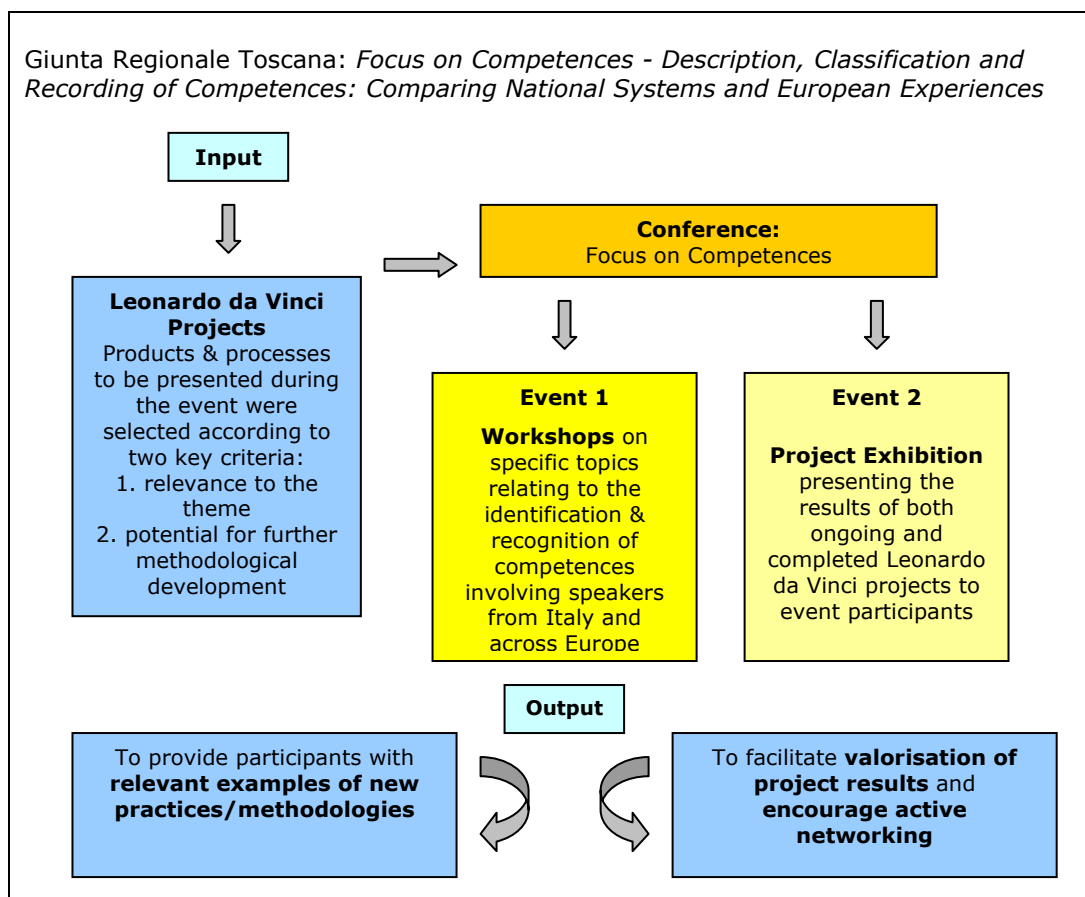
¹⁸ Transfer of Innovative VET Practices across Europe (2004-1250)



In the case above, the concept of valorisation was understood as the opportunity to provide stakeholders, in a restricted geographical area (Warmia and Mazury regions), with new knowledge in relation to regional development and self employment, building upon two previously-funded projects. Training activities based upon the results of the previously-funded projects were used to encourage the development of new project proposals (same subject areas) thus increasing the opportunity for local development activity in the selected regions. Valorisation therefore focused upon the use of the selected projects as a starting point in developing new strategic approaches.



This second case illustrates a different concept of valorisation, understood as an opportunity for an individual project promoter to geographically expand the use of products, processes and results developed through previously funded-projects. The analysis of the developed training materials (resulting from the three previous projects) undertaken during the two conferences provided an opportunity for the promoter to acquire new potential users for their training activities (this is not however a purely commercial exercise as the promoter is an NGO). Whilst the eventual knowledge transfer or incorporation of selected training courses into new or additional contexts remains low (the promoter remains the sole training provider), the European network established by the project shows potential, in the longer term, for the future transfer of good practice.



This final example shows a more comprehensive understanding of the valorisation concept, bringing together some of the essential features of valorisation events as required by the two Calls (e.g. coherence between selected theme and project results, exchange of good practice, matching of presented results to participant needs, structured brokerage activities). In fact, an overall theme was selected for the conference and exhibition and, on this basis, a selection of products, processes and results was undertaken focusing upon good practice and innovative approaches. The conference promoted increased knowledge in relation to new practices and methodologies specific to the field of skills recognition, scheduled brokerage activities targeted at valorising individual project results and encouraged new networking activities amongst different VET actors.

6.2 Needs Analysis and the Identification of Products

The majority of Contractors considered the identification of potential end users/target groups and the selection of products (for presentation during the valorisation event) as an essential activity to be implemented at the start of project implementation¹⁹. There were a few exceptions as regards the selection of products (2004-1044, 2004-1207 & 2004-1208), relating to the fact that projects were presenting their own pre-identified products/results during the valorisation event.

¹⁹ Refer to page 23 of this assessment report (§ 5.4 'Main Activities Undertaken')

Among the 19 funded projects, it was observed that a range of different approaches and tools were used in order to achieve this aim.

With regard to needs analysis the following trends were observed:

1. prior identification of potential users and target groups, considering the theme of the valorisation event
2. prior identification of potential users and target groups through active consultation with relevant stakeholders
3. prior identification of potential users and target groups through the use of specific selection criteria (interest in implementing results, ability to implement results, interest in taking part in the valorisation event)
4. identification of potential users and target groups following the qualitative analysis of selected products, ascertaining their suitability for transfer to new target groups
5. contracting of experts in order to establish a more effective and realistic list of target groups (used particularly in relation to projects targeted at SMEs)
6. involvement of sectoral organisations

In one case (2004-2604), potential participants were consulted before the valorisation event in order to obtain input during the preparatory phase of the event. In another case (2004-2609), ongoing consultation with potential participants, through the use of an online questionnaire on users needs, was undertaken during the planning phase (findings from this exercise influenced change in the eventual event held by the Contractor). A final case (2004-2693), shows that participants were selected on the basis of their ability to valorise the presented products and were further allocated roles (workshop leaders, panel representatives) in order to increase active participation in the event.

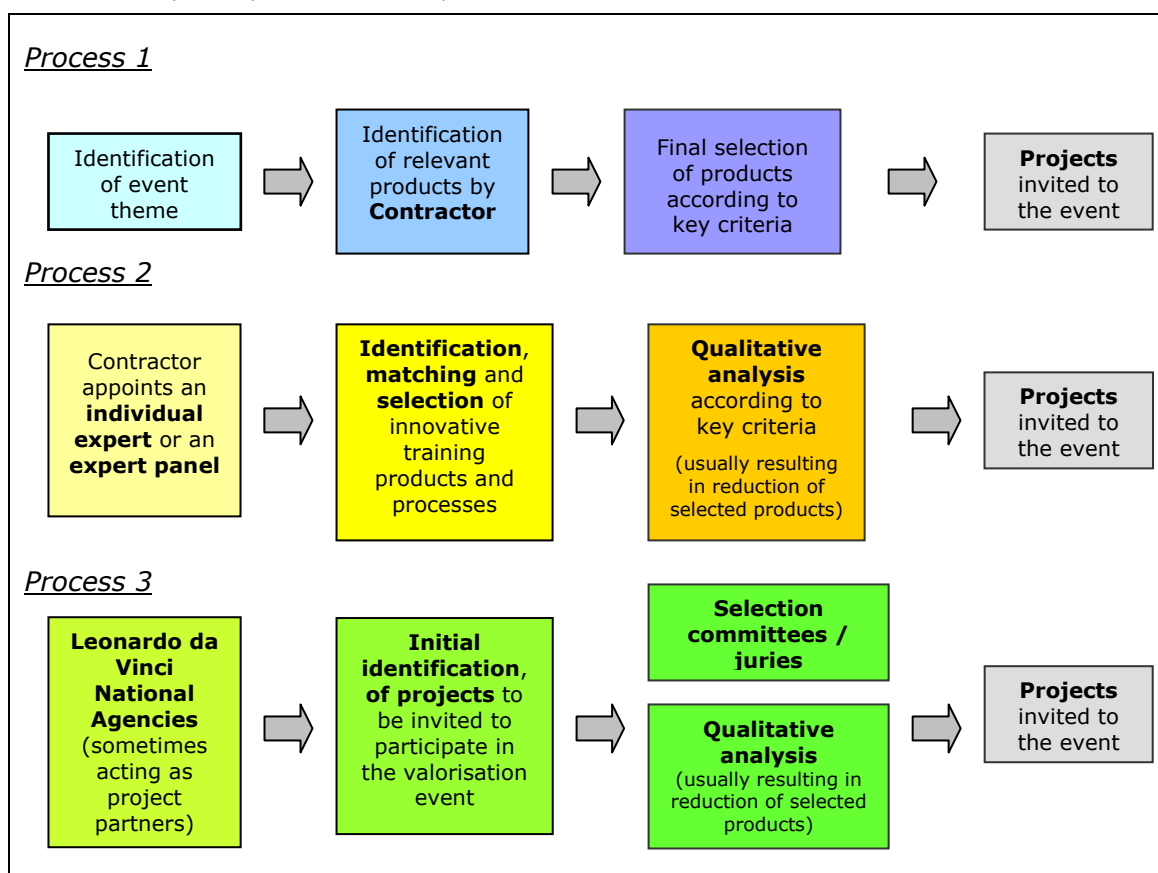
In relation to the identification of products, a wide variety of approaches and tools were employed, and a wealth of different actors involved, for which the following key trends were observed:

1. products were identified and eventually selected by the Contractor themselves, based upon the theme of the valorisation event and through the use of selection criteria (level of innovation, addressing sectoral needs, product quality and potential for transfer of results²⁰, relevance of products according to event themes, potential for further methodological development). This is considered as the simpler model

²⁰ in the project 2004-2603, the potential for transfer considered the potential of products/results to be used within new or additional fields or sectors and/or by new or additional target groups

2. products were identified by external experts, who then undertook the matching and selection of products. In most cases, experts began to work on an initial sample of products which was then reduced through additional qualitative analysis (different tools were used including selection criteria and analysis matrices)
3. product selection relied upon the involvement of Leonardo da Vinci National Agencies (sometimes acting as partners in the valorisation event project). In one case²¹, projects with successful products were initially nominated by participating National Agencies, with selection committees then planned in each participating country (eventually, due to the low number of products/results relating to the theme of the event, it was decided to take all related products/results without applying any further qualitative criteria). In another case²², all Leonardo da Vinci National Agencies were asked to recommend one project from each of the four target groups (Initial Vocational Training, young workers & recent graduates, university students, trainers) resulting in 70 mobility projects being recommended. Four juries and a jury head were then appointed to undergo initial selection according to specific criteria (results & benefits, project management, role & importance of mobility within the organisation). A second selection round, also involving European Commission staff, then resulted in an eventual 20 projects being invited to participate in the valorisation event.

Box 7 – Examples of product selection processes



²¹ Recognition of Competencies (2004-2603)

²² European Quality in Mobility Award (2004-2611)

It should, however, be pointed out that no relation could be found between the method used in identifying and selecting products and the eventual number of products chosen to be presented during the valorisation event. Indeed, factors such as budget, proposed scale of the event, logistics etc are likely to be a major influence on numbers of projects selected and invited.

6.3 Brokerage and Follow-up Activities

According to what was declared by Contractors within their final project reports, 95% of projects undertook some kind of follow-up activity in order to assure sustainability of the valorised products and processes²³. It is however interesting to look at the type of activities that were undertaken and the potential impact of such activities in terms of sustainability.

The most common follow-up activity undertaken by Contractors was that of distributing an evaluation questionnaire to participants (10 projects out of 19 identify this as a follow-up tool). Unfortunately, it is not always clear what was the response rate nor what use was made of the evaluation results (only 1 project declared that results will be used when organising future events).

In 8 cases²⁴, amongst relevant follow-up activities, we are advised of the post-event distribution of proceedings and conclusions to all participants (in printed and/or electronic form). In 7 cases²⁵, Contractors either chose to maintain the project website beyond the lifetime of the project or created new electronic platforms in order to make conference results both available and sustainable (e.g. online discussion forum).

In several cases, activities relating to follow-up and sustainability overlap, resulting in concrete future activities and demonstrating clear impact as a result of the valorisation event. Examples include:

- valorisation event embedded into Leonardo da Vinci National Agency activity (European Quality in Mobility Award)
- valorisation event to be repeated every two years, providing an opportunity for the exchange of experiences and for increased networking (under the auspices of FAO/CEE/BIT expert network for sustainable management in forestry, the next planned event will be held in Switzerland in 2007)
- future proposals (16) focusing upon the theme of the valorisation event (local development) to be submitted within the framework of the Leonardo da Vinci programme (or other European funding programmes)

²³ refer to page 23 of this assessment report (§ 5.4 Main activities undertaken)

²⁴ 2004-1044; 2004-1055; 2004-1250; 2004-2603; 2004-2607; 2004-2609; 2004-2611 and 2004-2693

²⁵ 2004-1057; 2004-1208; 2004-1251; 2004-2603; 2004-2607; 2004-2609 and 2004-2691

- networks established during the conference have continued, some resulting in new areas of joint activity, some resulting in new applications for funding
- a national working group was established in relation to the project theme
- partnerships were developed during the event workshops which are now undertaking new joint-activities

It should be stressed that the level of follow-up activities varied, with some projects adopting a range of approaches and tools (e.g. evaluation questionnaire & maintenance of project website; evaluation questionnaire & distribution of conference proceedings, etc.) and other projects reporting only minimal follow-up activities such as ongoing networking (the latter citing a lack of budget and/or lack of remaining project lifetime as reasons for minimal follow-up activity²⁶).

With regard to actual brokerage activities, it is clear that this concept was not clear to all Contractors. In the majority of cases, it seems that the valorisation event itself was considered as a brokerage opportunity and therefore no specific reinforcing activities in this sense were organised. Only two Contractors (Slovak Academic Association for International Co-Operation, SAAIC, and Giunta Regionale Toscana) undertook what can be described as brokerage activities. Both events held an exhibition, for SAAIC the valorisation event was linked to an already planned exhibition focusing upon similar themes, for Giunta Regionale Toscana a project exhibition space was organised as a part of the event during which provision was also made for face-to-face meetings. Giunta Regionale Toscana further undertook a matching exercise (between projects and participants) in advance of the event and subsequently organised timetabled meetings between projects and potential users. Having said that, in each of the 2 cited cases, no follow-up of these activities was reported by the promoter at the Final Report stage²⁷.

Overall, in relation to follow-up, sustainability and brokerage, we are provided with a number of interesting comments as a result of the survey of participants undertaken by DGEAC²⁸. Among the questions asked during the survey, participants (event organisers, project promoters, users/potential new users) were asked if the valorisation event had had any effect on their organisation beyond the date of the event, to which the majority of responses were positive.

²⁶ As stated earlier in this assessment report, some Contractors felt unable to hold additional or follow-up meetings due to a lack of remaining funds or based upon the fact that the project eligibility period had ended

²⁷ none of the sustainability activities listed on page 33 relate to the two cited projects

²⁸ an initial Survey of Participants was launched in May 2005; this exercise was repeated when the first valorisation events for the second Call had been completed (refer to section 6 of this assessment report)

Event Organisers

From the perspective of a National Agency, the project allowed us to meet promoters from other participating countries; this allowed us to pass their project details to relevant projects and thus facilitated networking for projects

This was a good opportunity to exchange project results and with regard to mutual future cooperation and use of the outcomes

The conference was a good opportunity to present different products and outcomes to a wide audience and to get to know Leonardo da Vinci project results

Promoters

We had understood the importance of valorisation before attending this conference, but this event made it even clearer to us

Such events increase recognition of the importance of dissemination and sharing of good practice at national/European level

I found partners for new projects and was invited to present my results

Presented new opportunities to enhance good products - in a self-sustainable context, selling and integrating products to new business

Users / Potential New Users

The event influenced a proposal for a new Leonardo da Vinci project by making it clearer what was needed (additional information and tools), and what could be built upon from the experiences of older projects

7. SURVEY OF PARTICIPANTS

In line with a strategic decision by DGEAC to measure the impact of dissemination and exploitation activities managed by the Directorate-General, it was decided to launch a survey of event participants to measure the impact and effects of valorisation events.

Based upon the assumption that dissemination, exploitation and transfer is not realistically achieved until at least five to nine months after the valorisation event and considering the fact that the final event relating to the first Call took place in January 2005, an initial Survey of Participants was launched in May 2005. This exercise was repeated with participants from the initial valorisation events completed in relation to the second Call.

It was foreseen that survey results would assist DGEAC in planning future dissemination and exploitation activities within current and future education and training programmes.

A questionnaire was developed (Annex VII) which aimed to:

- collect a series of statements on general aspects relating to potential impact of valorisation events e.g. whether the event acted as a forum for the exchange of ideas, whether there was any measurable effect beyond event participation (these questions were addressed to ALL participants)
- obtain precise data from the different categories of event participant e.g. project promoters, potential users, intermediaries (these questions were addressed individually to each category of participants)

The questionnaire featured both multiple-choice and open questions, the latter in order to allow participants to provide comments and opinions on the event attended.

Questionnaires were sent electronically to all participants having provided an active e-mail address (Contractors were asked to provide e-mail addresses for all event participants), accompanied by a letter (annex X) explaining the evaluation exercise. The response rate, as shown in the table below, was only 12% for event participants relating to the first Call with a slight increase (17%) for event participants relating to the second Call.

| | Events (EAC/88/03) | Events (EAC/23/04) |
|----------------------------|-------------------------------|-------------------------------|
| Questionnaires Sent | 1135 | 856 |
| Responses Received | 136 | 149 |
| Response Rate | 12% | 17% |

Such a low response rate is unable to provide any conclusive data (e.g. 100 respondents felt that the conference they attended gave them ideas for internal development and whilst this represents 72% of respondents this is actually only 9% of the original sample frame²⁹). The comments/feedback provided in the questionnaires was nevertheless extremely valuable both in confirming the range of different approaches adopted by the different projects and as regards any measurable impact, from the perspective of end users.

Box 9 - Example of feedback from event participant (intermediary)

The whole valorisation event was extremely useful for European project promoters and users at large. Too often, LdV projects simply die because they are not given a chance to be made known to professionals and/or to the public.

²⁹ the sample frame comprises all 3263 event participants

8. CONCLUSIONS AND RECOMMENDATIONS

DGEAC launched this assessment in order to better understand whether the two Calls (EAC/88/03 and EAC/23/04) managed to stimulate an increase in the use of Leonardo da Vinci products and results and to activate new channels and levels of participation and networking amongst different VET actors. This section brings together the identified successes, added-value and lessons learned and further presents recommendations to DGEAC with regard to the development and improvement of future dissemination and exploitation instruments, in particular those to be launched during the new programme (LLLp).

It is important to note at this point that the two Calls were essentially experimental, to further develop, and promote wider understanding of, the concept of valorisation.

Terminology and Understanding

The percentage of projects deemed ineligible during the two selection phases (29% and 25% respectively) is significant and suggests either a lack of clarity or a lack of understanding on the part of potential promoters.

Terminologically speaking, the term 'valorisation' does not appear to have been fully understood at the point of release of the two Calls. Additionally, the use of the term 'brokerage' in the two Calls appears to have caused some confusion, evidenced through a lack of real brokerage activities.

Beyond terminology, the concept of the valorisation event appears to have been interpreted differently by individual projects with events ranging from a general conference to a more encompassing event supported by parallel workshops and product exhibitions.

Recommendations:

1. Whilst initial improvements have already been made to Call documentation by DGEAC³⁰ all future Calls for Proposals should feature a separate Glossary of Terms ('valorisation', follow-up activities, end users, target groups, etc.) in addition to the definitions provided in the Call to ensure that all potential promoters fully and equally comprehend the aims and objectives of the Call³¹.

³⁰ an example is the replacement of the term 'brokerage' with 'interactive exchanges between project promoters and users [...] with the aim of facilitating the transfer and exploitation of project results to meet the needs of new users'

³¹ a common terminology was recently adopted in English, French and German with translation into all official languages also being considered - available at: http://ec.europa.eu/dgs/education_culture/valorisation/doc/glossary_en.pdf

2. Future promoters should be required to clearly outline the dimensions of their planned valorisation event. This would require the Grant Request Form (section 3) being updated to include a request for information on the type of event being held (e.g. large scale conference, thematic or sectoral event) and the type of sub-activities planned e.g. exhibition of products, workshops, interactive sessions between promoters and users, thus allowing improved appreciation of the planned event(s) during the selection phase.

Selection of Products, Processes and Results

The selection of products, processes and results for valorisation (dissemination and exploitation) ranged from a simple selection by the Contractor according to the theme of the event, to a multi-phase, multi-country selection and jury process. Funded projects involving one or more Leonardo da Vinci National Agencies further relied upon National Agency colleagues providing them with data and recommendations to support this selection process. This was not the case however for projects not involving Leonardo da Vinci National Agencies. Feedback from promoters (selected and non-selected projects) suggests that the identification of products for dissemination and exploitation is not always easy due to limited or inaccessible data sources in relation to successful projects, at both national and European levels.

Feedback gained from event participants indicated that a number of projects invited to present their product, process or result during a 'valorisation' event were not yet sufficiently advanced with their project to be able to fully exploit their project results. This leads us to believe that there must be a point at which it is too early to consider selecting a project for involvement in a valorisation event. Whilst, considering the differing progress levels of individual projects, it is difficult to place a time restriction on when (or when not) to involve a project, any promoter selected to participate in a valorisation event, should as a minimum, have a prototype of the product or process being developed already available.

Recommendations:

3. Information held by the European Commission and the network of National Agencies (all programmes) in relation to successful products and results should be more quickly and more readily accessible to potential promoters thus supporting an enhanced and improved selection of products, processes and results for further dissemination and exploitation.

4. Within future Calls for Proposals it should be made clear to potential promoters that when selecting projects to participate in a valorisation event, such projects must have already, as a minimum, reached the stage of their project where a prototype of the product or process proposed for valorisation is already available.

Successes and Added-Value

A review of the formal and non-formal project partnerships and of the data provided by Contractors in relation to valorisation events shows that projects successfully and actively involved candidate countries³² both within project partnerships and as event participants.

The European Dimension was achieved both on an individual project-level (projects involved formal and non-formal partners from up to 8 other European countries) and on a global scale, for which 26 out of 30 eligible countries³³ were active across the 19 funded projects with only Liechtenstein, Luxembourg, Malta & Romania not participating.

Valorisation events successfully engaged the participation of a wide range of potential users and new target groups (3263 participants involved in 30 events across 16 countries), of past and present project promoters and of decision-makers and key players in the field of vocational education and training across Europe representing significant added-value for the Leonardo da Vinci programme. Further analysis in relation to the division of event participant types shows that, roughly translated, for each project showcased there were potentially 4 new users present.

New and sustainable levels of participation are particularly visible where project results were subsequently embedded into existing practice (e.g. incorporation of the European Quality in Mobility Award into the work programmes of Leonardo da Vinci National Agencies). The same can be said for previously-funded valorisation events that are now planned to be repeated on a regular basis (e.g. International Forestry Training Centres Conference).

Recommendation:

5. Building upon the successes of the two 'experimental' Calls, DGEAC (Unit C3) to circulate / publish extracts from this assessment report (including the Case Studies) to raise awareness of / create higher levels of visibility for previously-funded valorisation events.

Post-Event Activities

A finding of the interim assessment, undertaken by DGEAC, was that there was an increased need to assure follow-up activities were undertaken by projects. In their final project reports, Contractors mainly cite a lack of remaining time and/or remaining funds as reasons for not undertaking (or at least reporting upon) follow-up activities. Positive moves have already taken place in this area, in the fact that the third Call for valorisation events (EAC/92/04), required potential promoters to dedicate both time and funds to follow-up activities.

³² a definition which now includes new EU Member States and accession countries

³³ Turkey was not eligible to participate

More recently, DGEAC launched a Call for Proposals in relation to results emanating from the Socrates programme (EAC/12/06) which built upon the third Call for valorisation events for Leonardo da Vinci and which also required that potential promoters dedicate time and funds to follow-up activities.

Box 10 - Response from user / potential new user during Survey of Participants

Whilst the event was very interesting, offering good potential for further cooperation, there has been no follow up. This might have had greater attention in comparable events.

A number of projects organised their own evaluation of event participants as a part of project follow-up activities. The subsequent Survey of Participants launched by DGEAC was therefore felt to be duplication, which in turn may have contributed to the low response rate.

The DGEAC Survey of Participants, aimed to be anonymous and to respect the European regulation on the protection of personal data³⁴, however, as one respondent pointed out, the first and most visible section of the questionnaire requested the organisation, nationality and e-mail address of the participant, which in most cases would reveal the identity of the respondent. This is also felt to be a contributing factor to the low response rate.

Feedback from the Survey of Participants suggests that events were not always focused or clear for potential participants. Participant feedback also focused specifically upon the possibilities allowed for networking with new project partners (i.e. focusing specifically upon the development of new projects). Whilst useful and inevitable networking exercises, the networking encouraged by the two Calls (networking amongst different VET actors) ought to be more clearly defined in the future, clearly stating that events are not contact seminars but aim to encourage potential new users to network with those having previously developed Leonardo da Vinci products and results to thus encourage wider dissemination and exploitation.

Box 11 - Examples of different networking opportunities afforded by the valorisation events

- The event allowed the... diffusion of our training programs, creation of new European projects and inclusion of new partners in our network
- During the event... I have found partners for new projects
- From the perspective of a National Agency, the project allowed us to meet promoters from other participating countries. This allowed us to pass their project details to relevant projects in (our country) and thus facilitated networking for projects

³⁴ European Regulation (CE) n° 45/2001

Event evaluation undertaken by individual projects (during or beyond their valorisation event) is fundamental yet very few projects provided information on response rates and on the use made of the evaluation results. DGEAC also has a responsibility here in specifically requesting such information within the Final Report for the project.

Recommendations:

6. DGEAC to consider criteria for measuring whether the introduction of minimum requirements for follow-up activities was successful in increasing the amount, range and impact of follow-up activities actually undertaken by projects e.g. Will projects be judged upon the amount of time dedicated to follow-up activities? Will there be a post-project analysis of funds actually expended in relation to follow-up activities? Will there be a requirement to report results against impact indicators set at the outset of the project?

7. Future Commission-led survey activities should have greater synergy with individual project follow-up strategies and should remove the requirement for contact details of the individual from the survey questionnaire to allow genuine anonymity.

8. Future Calls for Proposals should inform potential promoters of the importance of hosting focused events, informing (potential) participants, in advance, of the aim, objectives, content and theme of the planned valorisation event i.e. that valorisation events are not contact seminars but aim to encourage potential new users to network with those having previously developed Leonardo da Vinci products and results to thus encourage wider dissemination and exploitation.

9. Final Report documentation to be updated for valorisation events requiring Contractors to provide more detailed information on the evaluation strategy, evaluation response rates and upon the use of the results of event evaluation.

Tangible Results

The majority of projects established a web presence, some of which maintained this presence beyond the lifetime of the project. However, beyond the project website, projects produced a varying range of additional products or outputs, mainly in printed form, as a result of their valorisation events. Only minimal guidance appears to have been provided by DGEAC as regards the types of output to develop / format to adopt resulting in generally weak products, outputs & results as a result of the two Calls. As a minimum projects ought to consider how to circulate the findings/proceedings to act as a prompt or reminder for ongoing activity beyond the actual valorisation event.

Recommendations:

10. The requirement currently in place for Leonardo da Vinci projects to showcase their work via a website³⁵ should be extended to all valorisation events projects and should be a key criteria within any future Calls for Proposals.

11. Future Calls for Proposals should include an outline of expected products/outputs/results with a required minimum for projects to publish event findings/proceedings, where possible, in electronic format (pdf). This, in addition to the requirement for a project website (recommendation 10), will provide the Directorate-General with real examples of products and results resulting from valorisation events, for use in awareness-raising and in publicising past valorisation activity.

Impact Measurement

As already indicated at the start of this report, it is not the focus of the assessment to assess the medium and longer term impact of the individual projects on national and European level education and training systems, since the time frame since completion of the projects is too short. This aspect should be covered under the formal evaluation of the Leonardo da Vinci Programme.

Impact measurement is however recognised as important in order to be able to fully measure the value and potential of instruments such as valorisation events.

DGEAC has a responsibility to ensure that the reporting and assessment tools and mechanisms in place for valorisation events are sufficient to allow initial impact measurement to take place. Such mechanisms need to be flexible to consider the range of events being held, their individual characteristics (large scale conferences, thematic/sectoral conferences, restricted/ focused events) and the differing levels of participation.

Currently, the information provided by Contractors at the end of their project lifetime focuses more upon tangible or quantifiable outputs (publications, products, participants, etc.) than impact. Section B1 of the Final Report form requests information on impact but appears limited and restricted to any short-term impact measurement by the Contracted party (is there any real check undertaken as regards the validity of this data, if so, is this uniformly applied to all projects?).

Additionally, DGEAC needs to consider providing additional support to individual Contractors to enable them to individually measure, and subsequently report upon, the impact of their own valorisation events.

³⁵ since 2002, Leonardo da Vinci contractors have been required to showcase their work to the public via a project website (c.f. section 4 of the Leonardo da Vinci Guide for Promoters)

Too often, in relation to follow-up activities, the response provided in the project final report was that an evaluation of participants took place during or directly following the event(s), with the main focus being satisfaction with the actual event³⁶.

Contractors should be encouraged to more actively follow-up any networking that took place during their event between potential new users and promoters, thus promoting increased exploitation of the presented products & results. This activity would also potentially allow an enhanced level of understanding as regards actual impact. Other activities considered (but not fully evidenced) by some of the assessed projects included the establishing of new networks and discussion fora for event participants – again a useful activity that should be considered by more projects as this allows a link to be maintained with event participants that can be followed-up later and can allow any potential (longer-term) impact to be measured.

The Survey of Participants undertaken by DGEAC is one step towards meta-level impact assessment (unfortunately resulting in only a low response rate). DGEAC needs to consider what approaches it will take towards measuring the impact of all future funded valorisation events projects (Leonardo da Vinci, Socrates, Lifelong Learning Programme), considering both qualitative or financial measurement such as levels of participants and return on investment (ROI), and qualitative measurement such as the establishment of new user/developer networks, changes in usage levels of products and results developed as a result of European funding and any increase in the profile of European programmes as a result of valorisation events. Some ideas to consider include post-contract review meetings with Contractors (to identify ongoing follow-up activities), focus groups with selected event participants (6-8 months after the event) and active reviews of discussion fora (particularly those hosted beyond the valorisation event).

Recommendations:

12. Final Report Form for valorisation activities (Section B1) to be updated to request information on short-term impact measurement (what was measured? how was this undertaken? what were the results?) in addition to approaches to long-term impact measurement>

13. DGEAC to better inform and support Contractors in their follow-up activities, encouraging more active follow-up of event networking (between potential new users and promoters) and the establishment of post-project mechanisms for communication (networks, discussion fora).

14. DGEAC (Unit C3) to consider potential mechanisms for meta-level impact assessment for all programmes e.g. post-contract review

³⁶ Recommendation 9 already proposes that Final Report documentation be updated to allow Contractors to provide more detailed information on the evaluation strategy, evaluation response rates and upon the use of the results of event evaluation

meetings with Contractors, focus groups and active reviews of / participation in discussion fora.

In summary, the two 'experimental' Calls can be deemed a success, considering the extent of participation (19 projects hosting 30 events across 16 countries; projects involving 3263 participants from 26 countries), the active involvement of candidate countries and the potential for sustainability of the results (embedded activities and repeat events). Development was ongoing, even during the lifetime of the 19 funded projects with terminology being clarified, glossaries being introduced and programme documentation being updated. This development activity now needs to continue in line with the recommendations of this assessment report (enhanced involvement of National Agency data and expertise; clearer definitions of expected outputs and results; more active support to projects to enhance the range and level of follow-up activities). Finally, the Directorate-General needs to consider how it will measure the longer-term impact and successes of such projects on a larger, pan-project, pan-programme scale.



Leonardo da Vinci

Organisation of events (conferences, seminars and exhibitions) for the exploitation of innovative results from the Leonardo da Vinci programme – Assessment of Calls EAC/88/03 and EAC/23/04

Case Study 1

QUALITY IN MOBILITY

Experiences of Leonardo da Vinci National Agencies in developing and introducing the Quality in Mobility Award

Project Title

European Quality in Mobility Award

Contractor

Leonardo NCU Norway / Teknologisk Institutt

Project Summary

Focusing upon the mobility measure of the Leonardo da Vinci programme, this project launched the Quality in Mobility Award which is now an annual award given by Leonardo da Vinci National Agencies. The project brought together 8 Leonardo da Vinci National Agencies to highlight the importance of Quality in VET with particular regard to vocational mobility. Projects were nominated from 27 European countries and reduced to a final 20 selected projects, for which a showcase video was produced, following a period of intense jury selection. A two-day Conference was held in Oslo (NO) in January 2005 which brought together award-winners with new or potential Leonardo Mobility promoters (and other relevant stakeholders) in order to network and share experiences.

Project Management and Organisation

Work Processes and Procedures

The original idea for the project came from a transnational working group established to discuss, review and evaluate Leonardo da Vinci mobility activities. Leonardo da Vinci National Agencies were informed of the project in October 2004 and were asked to nominate national 'good practice' Mobility projects (2000-2002).

Project partners held a series of meetings (Vienna, Brussels & Maastricht) in advance of the event itself, to agree upon individual partner roles and the division of work, to agree upon the project nomination process and establish juries and to consider the decision of the juries with regard to selected projects. The eventual valorisation event was, in this case, as much a presentation of the results of the valorisation process as it was a vehicle for valorisation.

Participating Organisations

The project chose to work in partnership with 7 additional Leonardo da Vinci National Agencies responsible for mobility activities (AT, CZ, HU, IS, LT, NL & SE). Beyond this, all other Leonardo da Vinci National Agencies across Europe played an active role in the nomination of projects.

The Norwegian, Icelandic & Hungarian national agencies (project partners) played key roles in the receipt of project nominations and the circulation of these nominations to jury members.

Internal and External Communication

Considering the importance of Leonardo da Vinci National Agencies in this project, the coordinator undertook to keep all National Agencies informed of project developments throughout the planning stages.

Jury members were provided with nominated projects electronically, with each of the four established juries having a lead jury member responsible for gathering individual juror scores. Jury members from the final evaluation round subsequently met in Maastricht to come to a common decision on the projects selected to receive the Quality in Mobility Award.

Use of Financial Resources

The project aimed to subsidise the attendance of 20 projects at the event (those nominated in the final round, including the projects selected to receive the Quality in Mobility Award) with up to €500 for travel and subsistence costs. Eventually, 19 of the 20 projects attended and were subsidised.

Costs for the project were primarily associated with the running of the valorisation event with 60% of costs related to travel & subsistence for event participants. Only 11% of costs were attributed to staff costs. The final cost for the project was €101.529 with final Community funding of 59% (€60.333).

Products, Materials and Systems

Printed Materials

A compendium was produced and circulated during the valorisation event. The compendium, produced in EN over 108 pages, introduced the 176 event participants (projects, national agencies, social partners, potential new beneficiaries) and provided further detail on the selected projects and participating national agencies.

A projects brochure was also produced, in EN over 26 pages, which presented the 20 projects nominated in the final round, including those projects selected to receive the Quality in Mobility Award. Other materials produced by the project included a newsletter and outline project description (in NO) and a project presentation form (in EN).

Electronic Materials (CD-Rom, Websites, etc.)

Developed materials (conference programme, compendium, project description in NO) are available via the National Agency website at: www.teknologisk.no/leonardodavinci/. A video presentation was also produced on CD-Rom for use during the valorisation event in introducing the 20 projects nominated in the final round, including those projects selected to receive the Quality in Mobility Award.

Dissemination of Materials

The projects brochure was circulated to all Leonardo da Vinci National Agencies and further distributed during the Europass launch in Luxembourg on 31 January / 1 February 2005. The brochure was developed for the continuous promotion of Leonardo da Vinci mobility activities to potential promoters. The compendium was primarily developed for use during the valorisation event.

Events (Conferences & Seminars)

The main valorisation event for the project was a two-day conference (Leonardo da Vinci Quality in Mobility Award) held in Oslo on 24 & 25 January 2005.

Innovative Processes and Approaches

Tools, Methodologies and Approaches

A three-step methodology was adopted by the project, namely:

- **NOMINATION:** all Leonardo da Vinci National Agencies were invited to nominate mobility projects according to established quality criteria and using a project presentation form

- INITIAL SELECTION: the 70 nominated projects were circulated to four juries (each comprising 4 national agency or expert representatives) to be rated in three key areas (project management, project results & benefits and the role & importance of the mobility project in the organisation)
- FINAL SELECTION: the 20 pre-selected projects were passed to final juries (to ensure no conflict of interest in the final juries, 2 Hungarian jurors were replaced by 2 European Commission representatives) leading to the eventual selection of 5 projects to be given with the Quality in Mobility Award

The awards took place during the valorisation event held in Oslo on 24 & 25 January 2005.

The project greatly benefited from the partnership of 8 Leonardo da Vinci National Agencies, allowing nominations from all National Agencies, who are obviously experienced actors in the management of mobility projects.

The use of a two-step selection process is not dissimilar to the approach adopted in the selection of Leonardo da Vinci projects, however, the project also used multi-national and multi-actor juries confirming the importance of the selection process in the project.

The replacement of the Hungarian jurors related to the presence of Hungarian projects in the final selection groups (20 pre-selected projects).

Innovative Aspects and Added Value

The concept of this project is in itself innovative in the fact that this was the first step towards the recognition of quality in mobility for Leonardo da Vinci. Added-value is evident considering the fact that the Quality in Mobility Award is now recognised by the Commission and is further embedded into the annual activities for Leonardo da Vinci National Agencies working in the field of mobility (the second Quality in Mobility Awards took place in Austria on 10 May 2006).

Dissemination

All Leonardo da Vinci National Agencies were provided with copies of the projects brochure for the continuous promotion of Leonardo da Vinci mobility activities to current and potential promoters.

The Quality in Mobility Award was further promoted during the Europass launch in Luxembourg on 31 January / 1 February 2005.

Considering the focus upon European mobility, the project received a high amount of press coverage mainly in, although not restricted to, the host country.

Impact and Added Value

Value for the Target Sector

The Quality in Mobility Award is non-sector specific and considers European mobility projects in all sectors.

Impact on Policy and Training Systems

The project increased cooperation, specifically as regards mobility activities, between Leonardo da Vinci National Agencies in the all participating countries. The jury activities in the project revealed that differences exist in the national priorities of each country which can affect the selection of mobility projects – this allowed discussion upon the role and importance of national priorities in transnational mobility activities and further expects to contribute to a more unified approach in the selection, monitoring and support of funded mobility projects.

The series of quality in mobility indicators developed by the project is now used to support the Quality Charter annexed to all Leonardo da Vinci mobility contracts.

Benefit to End Users

Existing and potential mobility promoters attending the event were provided with both written and visual examples of good practice.

Potential promoters will have access to examples of good or qualitative practice in mobility through the circulation of the projects brochure to all National Agencies.

Strengths

Content and Product Related

The project prepared an extremely professional visual presentation of the 20 projects nominated in the final round, including those projects selected to receive the Quality in Mobility Award.

Methodological and Organisational

The project greatly benefited from the partnership of 8 Leonardo da Vinci National Agencies, allowing nominations from all National Agencies, who are obviously experienced actors in the management of mobility projects.

The initial agreement upon quality in mobility indicators followed by a three-step methodology comprising nomination, initial and final selection proved a success and expects to be used in future quality in mobility project selection.

Dissemination, Impact and Added Value

The use of the existing Leonardo da Vinci National Agencies network and the additional promotion of the Quality in Mobility Award during the Europass launch in Luxembourg allows ongoing dissemination via existing national networks and brings with it the potential for ongoing impact upon eventual or end beneficiaries (existing and potential Leonardo da Vinci mobility promoters).

Lessons Learned

A challenge for the project was that of involving the European Commission at the relevant level for the project. Unlike the award for reference materials, transnational networks, thematic actions & pilot and language competencies projects, the Quality in Mobility Award was led by the Leonardo da Vinci National Agencies with the support of the European Commission (as opposed to being led by the European Commission with the support of National Agencies). The Commission however was involved in the final stages of implementation through its' presence in the final selection committee (final jury).

The project originally intended to name the award the 'European Quality Award', however, this was changed to the 'Quality in Mobility Award' under advice from the European Commission.

Beyond the Project Lifetime

The Austrian Leonardo da Vinci National Agency hosted the second Quality in Mobility Award on 10 May 2006 in Graz, organised as a part of the Austrian Presidency of the EU for 2006. In contrast to the previous award, this was promoted as the first 'European' Quality in Mobility Award and involved around 300 European experts, European Commission and local ministry representatives.

Twenty four mobility projects were selected from across Europe by an international selection panel, each one presenting their mobility project in Graz. From the twenty four selected projects, one project was selected from each of the agreed target groups (Initial Vocational Training, Training of Students in Enterprises, Young Workers and Graduates, Teachers and Trainers, Projects Coordinated by Enterprises) to receive the Quality in Mobility Award.

A further development in Graz was the nomination of Leonardo da Vinci Mobility Ambassadors from 20 different European countries, further enhancing the visibility of Leonardo da Vinci mobility activities across Europe.

Useful Documents

Conference Programme – Oslo
Compendium – Oslo
Projects Brochure – Oslo
Ambassador Brochure – Graz
Projects Brochure – Graz

Contact(s)

Anne Haugen Tronvoll
Leonardo NCU Norway / Teknologisk Institutt
PO Box 2608 St. Hanshaugen
0131-OSLO Norway
Tel: +47 91 551 073
E-mail: anne.tronvoll@teknologisk.no

Project Website

www.teknologisk.no/leonardodavinci/

Organisation of events (conferences, seminars and exhibitions) for the exploitation of innovative results from the Leonardo da Vinci programme – Assessment of Calls EAC/88/03 and EAC/23/04

Case Study 2

THE SECTORAL APPROACH

Active participation of target sector representatives

Project Title

[1] The Future of Vocational and Continuous Education & Training in the Tourism Sector

[2] Health and Social Care Occupations – Impulses in European Projects

Contractor

Nationale Agentur Bildung für Europa beim BIBB

Project Summary

This project, organised by the Leonardo da Vinci National Agency in Germany, focused upon the presentation and exploitation of successful Leonardo da Vinci project results. Separate conferences were held in Germany in Eibsee (January 2005) and Bonn (March 2005), each over two days, focusing respectively upon the Tourism and Health & Social Care sectors. Featured projects were selected according to four key criteria (innovation, addressing sectoral needs, product quality and transfer potential) with the focus being to exchange experience and to further disseminate project results to potential stakeholders.

Conferences were attended by social partners, training bodies, decision makers and potential end users in the field of VET.

Project Management and Organisation

Work Processes and Procedures

The project focused upon full and active participation and involvement of actors from the two selected sectors (tourism, health & social care) from the start of the project. The preliminary screening of projects to be presented at the valorisation events is a further asset.

Participating Organisations

All participating partner organisations were Leonardo da Vinci National Agencies (led by the German National Agency with partners represented by National Agencies Austria, Slovakia and the Netherlands). The majority of project-related tasks were however carried out by the German National Agency. The project held one preparatory meeting.

Internal and External Communication

The project used a variety of publicity and promotional tools and instruments such as magazines, e-newsletters, direct mailings and the presence of project data on the websites of the participating National Agencies, which helped to maintain active communication with all relevant parties (including stakeholders).

Use of Financial Resources

Costs for the project were primarily dedicated to staff and preparation/implementation of the valorisation event. The final cost for the project was €74.522 with final Community funding of 75% (€55.988). For a relatively small budget, there was felt to be both significant impact upon and obvious benefit for the two selected sectors.

Products, Materials and Systems

Printed Materials

The main documents produced by the project relate to the two one-day events and include conference programmes, copies of presentations, summaries of panel discussions and closing statements. The majority of documents are in DE with only the conference programme produced in both EN & DE.

Electronic Materials (CD-Rom, Websites, etc.)

The above-described event documentation is available to download from the 'vorträge & präsentationen' section of the German National Agency website (www.na-bibb.de).

Dissemination of Materials

Various publicity and promotional instruments were used, including newsletters and e-newsletters, direct mailings and partner websites. Participating Leonardo da Vinci National Agencies hosted information on the two events on their respective websites and e-newsletters were used to direct interested parties to the website.

Events (Conferences & Seminars)

The first conference was held in Eibsee (10 & 11 January 2005) focusing upon the Tourism sector. The second conference was held in Bonn (10-11 March 2005) focusing upon the Health & Social Care sector. Seminar participants were able to build upon existing, or develop new, partnerships to facilitate the transfer of products or processes thus continuing dissemination and expanding the potential for exploitation of the previously developed Leonardo da Vinci products / results. Both events gained from the transnational character of the project and both acted as platforms for valorisation.

Innovative Processes and Approaches

Tools, Methodologies and Approaches

Initial steps for the project were the identification and analysis of end user/target group needs and the selection of innovative training products and processes.

In order to select projects, four criteria were agreed upon:

- level of innovation
- degree to which the project addressed Sectoral needs
- product quality
- potential for transfer of results

The approach to hosting the actual conferences however was rather traditional (welcome, information, presentations, discussion).

Innovative Aspects and Added Value

The project clearly demonstrates active participation from the two selected sectors (tourism, health & social care) and active involvement from end users in all stages of the project (screening, selection, preparation, communication, organisation, implementation and follow-up). This highlights the potential added-value when focusing upon specific solutions within clearly defined sectors and supports the fact that a sectoral approach is a positive approach towards the valorisation and potential sustainability of training products and results.

A further positive aspect for the project was the approach to evaluation, with all event participants undergoing direct evaluation (telephone interviews) within one month after the valorisation event.

Dissemination

The events themselves provided an excellent platform for valorisation of the selected projects and functioned as an effective marketing instrument with a clear focus upon end users and potential new beneficiaries.

Impact and Added Value

Value for the Target Sector

The project relied heavily upon the initial selection of a wide range of end users and target group representatives including representatives from each of the two identified sectors. Each of the events further benefited from the active involvement of Leonardo da Vinci promoters, ex-promoters and VET-practitioners and the participation of education and training professionals, national educational and sectoral bodies, policy and decision makers and social partners.

Impact on Policy and Training Systems

Both events offered a clear marketing platform to the selected projects to allow an exchange of experience and the promotion of end results. Overall, the project has the potential to introduce real change or improvement in existing training practice and delivery systems, this considering the high quality of the presented information and the selection of products in relation to sector specific needs and transfer potential.

Strengths

Content and Product Related

The importance placed on the preliminary project selection phase assured greater potential for usability, transferability and sustainability of the identified products and results within the identified sectors.

Methodological and Organisational

Initial agreement upon project selection criteria formed a strong basis for the project. Based upon this selection, projects were invited to attend the event (as related to their project theme) and to present their products / results. Both of the identified sectors (tourism, health & social care) actively participated in the events assuring direct impact upon potential new end users.

Dissemination, Impact and Added Value

Publicity for the event was organised through coverage in the Journal of the German Leonardo da Vinci National Agency, via the internet and through the use of e-mailings and e-newsletters. Both events offered a clear marketing platform to the involved projects to disseminate and exchange experiences and results with expected longer term impact and potential for increased take up and use of the developed products/results.

Lessons Learned

Unfortunately, only 4 projects were presented during the Tourism conference in January 2005. Whilst numerous projects were identified as potential contributors and whilst high levels of support and encouragement were given from the participating partners, it remained a difficulty in persuading project representatives to participate in these events. This might suggest that future projects need to consider a longer lead-in time to ensure more active participation.

Whilst the participation level for project promoters and VET practitioners was sufficiently high, there were significantly fewer policy and/or decision-makers e.g. the Health & Social Care Conference involved only 4 decision makers from a total of 87 participants. Future events should aim for an increased level of involvement from policy and decision-makers during all project stages (preparation, event hosting, follow-up).

Evaluation and follow-up activities needed to be stronger for these two events, comprising follow up meetings for project partners, early agreement upon evaluation mechanisms and instruments and more active support of new partnerships.

Beyond the Project Lifetime

Future plans for the partnership of Leonardo da Vinci National Agencies include the establishment of an online discussion forum on the website of the German Leonardo da Vinci National Agency and the introduction of a 'platform for valorisation' (project database) aiming at supporting new networks.

Results of the event evaluation surveys will be finalised and published.

Useful Documents

All event documentation is available to download from the 'vorträge & präsentationen' section of the German National Agency website (www.na-bibb.de).

Contact(s)

Ulrike ENGELS
Nationale Agentur Bildung für Europa beim BIBB
Robert Schuman Platz 3
53715 BONN Germany
Tel: +49 228 107 16 10
Email: engels@bibb.de

Project Website

www.na-bibb.de (section: vorträge & präsentationen)

Call for proposals DG EAC/88/03

AWARDING OF GRANTS FOR THE ORGANISATION OF EVENTS (SEMINARS AND CONFERENCES) FOR THE EXPLOITATION OF INNOVATIVE RESULTS FROM THE LEONARDO DA VINCI PROGRAMME

1. Context

The Leonardo da Vinci programme contributes to the implementation of a vocational training policy for the Community, which supports and supplements the actions of the Member States (Article 150 of the Treaty establishing the European Community). The Council has adopted a second phase of the programme for the period 2000 to 2006 by Decision 1999/382/EC¹. Its aim is to promote new practical approaches in vocational training policies.

According to this Council Decision, under the Accompanying Measures provisions, the possibility exists to award grants to organisations from participating countries for the organisation of seminars and/or conferences in order to promote the dissemination and exploitation of the innovative products and processes that have been developed by Leonardo da Vinci pilot projects.

2. Objective

This call for proposals concerns the organisation of events (seminars and conferences) to promote the dissemination and exploitation (ie 'valorisation'²) of the new products and processes resulting from innovative projects, finished or close to completion, that have been supported under the Leonardo da Vinci Programme.

Support will be given to events which provide a show case for successful Leonardo da Vinci products and processes in the context of interactive exchanges between the project promoters

¹ Decision 1999/382/EC, published in OJ L 146 of 11/06/1999.

² 'Valorisation' can be described as a process of exploiting project learning and outcomes (training products and processes, methodology, course materials etc) with a view to optimising their value and impact in existing and new contexts (target groups, companies, sectors, training institutions and systems etc). To be effective, the process requires:

- a focus on end user/target group needs from project inception;
- dissemination of innovative training products and results;
- selection and analysis of their suitability for transfer to meet identified new needs;
- translation and adaptation to targeted new contexts;
- piloting and experimentation;
- leading to full integration into the new context.

This process can take place at the micro project level or on a macro level, with the aim of achieving full and sustainable integration into local, regional, national and/or European training systems and practices, including through formal certification of qualifications.

and potential new users. Priority will be given to events which aim to create a dynamic matching of projects to new users' needs, to facilitate the transfer of innovative results and the integration and use of such results in other training systems and by users that were not involved in the life of the project . Applicants will therefore need to demonstrate that they have effective approaches and mechanisms in place to address the following in particular:

- identification and analysis of end user/target group needs;
- identification and dissemination of innovative training products and processes³;
- selection and analysis of their suitability for transfer to meet identified needs;
- the most suitable brokerage activities for maximum impact from the proposed event; and
- proposals for follow-up activities in order to assure the sustainability of valorised products and processes.

Events may be organised, with appropriate justification, on a sectoral or thematic basis, including in particular in support of Thematic Monitoring⁴ activities.

3. Publication

The call for proposals will be published and disseminated on the Internet site of the DG Education and Culture dedicated to the Leonardo da Vinci programme, at the address:

http://europa.eu.int/comm/education/leonardo/leonardo2_en.html

Notice of the call for proposals will be published in the Official Journal of the European Communities.

³ Information on projects and products supported under the Leonardo da Vinci Programmes I and II can be found at :
http://europa.eu.int/comm/education/copenhagen/index_en.html

⁴ Thematic Monitoring : Since 2002, the European Commission and the Member States have been developing the thematic monitoring of projects within the framework of the Leonardo da Vinci Programme, to develop the necessary synergies and exchanges between projects, to gain a better overview of project content and to improve overall impact at both individual project and programme level.

Based on the priorities set out in the 2000–2002 call for proposals and on the current political priorities of the Commission, five themes were identified. Each theme is coordinated by a National Agency in close cooperation with the European Commission and in association with a group of National Agencies and the Socrates, Leonardo & Youth Technical Assistance Office. The five themes are:

- Integration into the Labour Market
- Development of Competencies and Skills within Companies and, in particular, within SMEs.
- Adaptation of the Training Supply and New Training Methods – Quality of Training
- Transparency, Assessment and Validation of Knowledge
- E-learning

For more information, please visit the following web address:

<http://www3.socleoyouth.be/static/en/leonardo/entrance.htm>

The grant requests should be made using the forms specifically designed for this purpose and which are appended to the text of the call at the same web site address. This documentation is available in English, French and German at the date of publication of the call for proposals. Versions in the remaining eight official languages will be placed on the site by mid-January 2004.

4. Presentation of the grant application

Only proposals submitted on the official application form (see Annex 1), completed in full, and received by the specified closing date will be considered.

Three copies of the grant application must be transmitted to the competent services of the Commission. Applications should provide complete information that can be checked against the criteria defined in points 5, 6 and 7.

All additional information that is considered necessary by the applicant can be included on separate sheets.

The application must be duly completed, signed (original signatures as required) and accompanied by an official letter from the applicant organisation as well as the documents proving its technical and financial capacity.

The grant application must include a detailed provisional budget (see Annex 2). All prices must be quoted in euro. Applicants from countries not participating in the Euro must use the conversion rates published in the Official Journal of the European Communities, C series, on the date of publication of this call.

The application must be sent to the address below by ordinary or registered post by **5 March 2004** at the latest (as per postmark). Envelopes should be addressed as follows:

Call for proposals DG EAC/88/03
“Leonardo da Vinci Programme - Events for the Exploitation of Programme and Project Results”
Technical Assistance Office – Socrates, Leonardo and Youth
59-61 rue de Treves
B-1040 Brussels, Belgium

Applications sent via Internet, fax or e-mail will not be accepted.

Applicants will be informed of the receipt of their proposals within 10 working days.

Only applications that fulfil the eligibility criteria will be considered for a possible grant. Ineligible applications will be responded to, indicating the reasons for their ineligibility.

All unsuccessful applicants will be informed in writing. The results of the selection will be communicated as soon as possible after completion of the procedure, which should be by the end of April 2004.

The selected proposals will be subject to detailed financial examination, at which stage the Commission may request complementary information from the persons responsible for the proposed actions.

In the event of final approval by the Commission, a financial contract, drawn up in euro and detailing the conditions and level of funding, will be concluded between the Commission and the beneficiary. This contract (the original) must be signed and returned to the Commission immediately.

5. Eligibility and exclusion criteria

Submission of grant requests under this call is open in particular to European, national, regional and sectoral organisations, including European networks, meeting the eligibility criteria mentioned in points 5, 6 and 7 below, working in the field of Vocational Education and Training and wishing to organise events (seminars/conferences) in the specific areas covered by this call for proposals.

The coordinating/promoting institutions must possess a legal identity and must be established in one of the 15 EU Member States, in the states of EFTA/EEA (Iceland, Liechtenstein, Norway), and/or in Cyprus, Malta and the associated countries of Central and Eastern Europe: Bulgaria, Estonia, Hungary, Latvia, Lithuania, Poland, Czech Republic, Romania, Slovakia, Slovenia).

Applicants must certify (see point 6 of the Grant Request) that they are not in one of the situations listed in Article 93 and 94 of the Financial Regulation applicable to the general budget of the European Communities⁵ as detailed in point 3.2

Applicants will be excluded from participating in this call for proposals if they are in one of the following situations:

- (a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- (c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- (d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;

⁵ Council Regulation (EC, Euratom) n° 1605/2002 of 25 June 2002.

- (e) they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interest;
- (f) they have been declared to be in serious breach of contract for failure to comply with their contractual obligations, following another procurement procedure or grant award procedure financed by the Community budget;

Applicants will be excluded from receiving the grant if, at the time of the grant award procedure, they are in one of the following situations:

- (a) are subject to a conflict of interest;
- (b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

According to Articles 93 to 96 of the Financial Regulation and Article 133 of the implementing rules, administrative and financial penalties which are effective, proportionate and dissuasive may be applied to applicants excluded for one of the above reasons.

6. Selection criteria

Proof of technical and financial capacity

The application form must be accompanied by the following documents:

- The profit and loss accounts of the applicant organisation, and the balance sheet for the last 3 financial years for which the accounts have been closed. The verification of financial capacity shall not apply to public bodies.
- A copy of its legally registered statutes or articles of association as well as a copy of its official registration certificate, except if it is a public or semi-public organisation. This document must be provided in one of the 11 official EU languages.
- CVs of the applicants giving details of relevant professional experience
- Declaration on their honour from applicants, completed and signed, certifying that they exist as a legal person and have the financial and operational capacity to complete the proposed actions.
- Declaration on their honour from applicants, completed and signed, certifying that they are not in one of the situations listed in Article 93 and 94 of the Financial Regulation.(see Point 6 of Grant Request)
- The financial identification form (see Annex 3) completed by the beneficiary and certified by the bank (original signatures as required). This account or sub-account must make it possible to identify funds paid by the Commission. If the funds paid to this account yield interest or equivalent benefits under the law of the State on whose territory the account is opened, such interest or benefits shall, if they are generated by pre-financing payments, be recovered by the Commission as specified in Article II.16.4 of the contract.

7. Award criteria

The Commission will award the grants after having taken into consideration the following criteria:

7.1. Content of the proposals:

The following elements will be assessed:

- relevance of the content and anticipated results of the event (Seminar/Conference) to the objectives of the Call ie contribution to the dissemination and exploitation ('valorisation') of innovative results of Leonardo da Vinci projects; and to identifying and meeting identified training needs;
- quality of the proposed organisational structure and in particular its capacity to disseminate, valorise and ensure effective follow-up;
- number, profile and quality of participants at the event (range of existing and potential users/target groups, project promoters and partners, decision-makers at all levels, key players in the field of vocational training) ;
- quality and effectiveness of methodology, tools and practical approaches proposed for analysis and matching of products and user needs; and scope for standardisation/sustainability;
- European dimension of the event, measured in terms of contribution to the event's content and objectives; number of participants (promoters and users) from different countries participating in the Leonardo da Vinci programme; and potential expected impact;
- active involvement of organisations and presence of participants from candidate countries.

7.2. Organisational and budgetary aspects of the proposals:

The following elements will be assessed:

- work plan (for its clarity and its appropriateness with regard to the objectives and means proposed);
- project calendar;
- coherence of the budget with the work plan;
- monitoring and evaluation methodology;

8. Financial conditions

8.1 The budget available for this call is **€500,000**.

8.2 On the basis of this amount, the Directorate General for Education and Culture envisages supporting between 7 and 10 events with a maximum grant normally not exceeding €70,000 and covering in any case a maximum of 75% of the eligible costs. The contract will have a maximum duration of 10 months, commencing from the date

of signature of the contract by the two parties. It will cover activities relating to events (seminars and conferences) to be organised between May 2004 and February 2005.

8.3 Payment modalities :

- a pre-financing payment of maximum 80% within 45 days after signature of the contract by the two parties concerned;
- the balance within 45 days after approval of the final report by the Commission.

According to the terms of the financial agreement, persons responsible for proposals approved and financed by the Commission must submit a final report on completion of the project. This report should provide a succinct but complete description of the proceedings, results and planned follow-up of the activities outlined in the proposal, including in particular the identification and assessment of any difficulties encountered in delivering any aspects of the event. The report should also be accompanied by any publications produced (brochures, teaching material, videos, multimedia, press clippings, website addresses etc.).

The final financial statement, annexed to the final report, should show real costs and receipts. The beneficiary must set up an accounting system for the co-financed action and keep all original supporting documents for possible auditing for a period of five years as from the date of completion of the agreement.

8.4 Financial guarantee :

The contracting authority may require the beneficiary to lodge a guarantee in advance in order to limit the financial risks connected with the payment of pre-financing. The guarantee shall be valid for a period sufficiently long to allow it to be activated. The guarantee shall be provided by an approved bank or financial institution established in one of the Member States.

The guarantee may be replaced by a joint and several guarantee by a third party or by the joint guarantee of the beneficiaries of an action who are parties to the same grant agreement.

The guarantee shall be denominated in euro.

It shall have the effect of making the bank or financial institution, third party or the other beneficiaries stand as irrevocable collateral security, or first-call guarantor of the grant beneficiary's obligations.

The guarantee shall be released as the pre-financing is gradually cleared against interim payments or payments of balances to the beneficiary in accordance with the conditions laid down in the grant agreement.

8.5 Eligible costs :

Only the following costs will be deemed as eligible, in so far as they are properly calculated and valued according to market conditions and that they can be identified and verified. They are direct costs incurred in the implementation of the project:

- personnel costs for working on the implementation of the actions described in the proposal;
- travel, accommodation and subsistence per diem (see Annex 4) costs related to the carrying out of the action;
- costs linked to the specific organisation (room hire, interpretation, etc.), to be detailed;
- publication and dissemination costs;
- other direct costs (please specify);
- general expenditure (overheads) up to a maximum of 7% of total eligible costs for the action.

8.6 Ineligible costs :

The following costs/expenditures will be excluded from the co-financing budget request:

- costs incurred by a third party and not reimbursed by the beneficiary organisation;
- contributions in kind which do not involve a financial transaction;
- expenditures related to infrastructure acquisition;
- expenditures not related to the specific activities of the project (notably, running costs and/or expenditures related to statutory obligations);
- expenditures which are clearly unnecessary or excessive;
- capital investment costs;
- general provision (for losses, possible future liabilities, etc); contingency reserve; debts owed; charges for financial service; exchange losses, unless specifically provided for in exceptional cases.

8.7 The grant may not have the purpose or effect of producing a profit for the beneficiary. Profit shall be defined as a surplus of receipts over the costs of the action in question when the request is made for final payment of a grant for an action.

8.8 The budget for the action or the operating budget attached to the application must have revenue and expenditure in balance and show clearly the costs which are eligible for financing from the Community budget.

8.9 The applicant shall indicate (see point 3.7 of the Grant Request) the sources and amounts of any other funding received or applied for in the same financial year for the same action or for any other action and for routine activities. One action may give rise to the award of only one grant from the budget to any one beneficiary.

9. Subcontracting and Award of procurement contracts

Where implementation of the assisted actions requires the award of procurement contracts, beneficiaries of grants shall request at least 3 offers from different tenders and shall award the contract to the tender offering best value for money, that is to say, to the tender offering the best price-quality ratio, in compliance with the principles of transparency and equal treatment for potential contractors, care being taken to avoid any conflict of interests.

10. Ex-post publicity

10.1 All grants awarded in the course of a financial year, except scholarships paid to natural persons, shall be published on the Internet site of the Community institutions during the first half of the year following the closure of the budget year in respect of which they were awarded.

In cases where management is delegated to the bodies referred to in Article 54 of the Financial Regulation, reference shall be made at least to the address of the web site where this information can be found if it is not published directly on the Internet site of the Community institutions.

The information may also be published by any other appropriate medium, including the Official Journal of the European Communities.

10.2 The following shall be published with the agreement of the beneficiary (see point 6 of the Grant Request) :

- (a) the name and address of the beneficiaries;
- (b) the subject of the grant;
- (c) the amount awarded and the rate of funding of the costs of the action or approved work programme.

11. Contact for Further information

11.1 In the event that potential applicants have any questions concerning the detail of this call or requests for further information, please write to: unite-B3@cec.eu.int

12 Annexes

1. Grant Request Form
2. Budget Breakdown Form
3. Financial Identification Form
4. Table of Per Diem Subsistence Cost
5. Model Grant Agreement

Call for proposals DG EAC/23/04

AWARDING OF GRANTS FOR THE ORGANISATION OF EVENTS (CONFERENCES AND EXHIBITIONS) FOR THE EXPLOITATION OF INNOVATIVE RESULTS FROM THE LEONARDO DA VINCI PROGRAMME

1. Context

The Leonardo da Vinci programme contributes to the implementation of a vocational training policy for the Community, which supports and supplements the actions of the Member States (Article 150 of the Treaty establishing the European Community). The Council has adopted a second phase of the programme for the period 2000 to 2006 by Decision 1999/382/EC¹. Its aim is to promote new practical approaches in vocational training policies.

According to this Council Decision, under the Accompanying Measures provisions, the possibility exists to award grants to organisations from participating countries for the organisation of events in order to promote the dissemination and exploitation of the innovative products and processes that have been developed by Leonardo da Vinci pilot projects.

2. Objective

This call for proposals concerns the organisation of events (conferences and exhibitions) to promote the exploitation (ie 'valorisation'²) of the new products and processes resulting from innovative projects, finished or close to completion, that have been supported under the Leonardo da Vinci Programme.

Support will be given to events which provide a show case for a number of successful Leonardo da Vinci products and processes in the context of interactive exchanges between the project promoters and potential new users. Priority will be given to events which aim to create

¹ Decision 1999/382/EC, published in OJ L 146 of 11/06/1999.

² 'Valorisation' can be described as a process of exploiting project learning and outcomes (training products and processes, methodology, course materials etc) with a view to optimising their value and impact in existing and new contexts (target groups, companies, sectors, training institutions and systems etc). To be effective, the process requires:

- a focus on end user/target group needs from project inception;
- dissemination of innovative training products and results;
- selection and analysis of their suitability for transfer to meet identified new needs;
- translation and adaptation to targeted new contexts;
- piloting and experimentation;
- leading to full integration into the new context.

This process can take place at the micro project level or on a macro level, with the aim of achieving full and sustainable integration into local, regional, national and/or European training systems and practices, including through formal certification of qualifications.

a dynamic matching of a number of products and processes to new users' needs, to facilitate the transfer of innovative results and the integration and use of such results in other training systems and by users who were not involved in the life of the project. Applicants will therefore need to demonstrate that they have effective approaches and mechanisms in place to address the following in particular:

- identification and analysis of end user/target group needs;
- identification and dissemination of innovative training products and processes³;
- selection and analysis of their suitability for transfer to meet identified needs;
- the most suitable brokerage activities for maximum impact from the proposed event; and
- proposals for follow-up activities in order to assure the sustainability of valorised products and processes.

Priority will be given to events organised, with appropriate justification, on a sectoral or thematic basis, including in particular in support of Thematic Monitoring⁴ activities.

3. Publication

The call for proposals will be published and disseminated on the Internet site of the DG Education and Culture dedicated to the Leonardo da Vinci programme, at the address:

http://europa.eu.int/comm/education/leonardo/leonardo2_en.html

Notice of the call for proposals will be published in the Official Journal of the European Communities.

³ Information on projects and products supported under the Leonardo da Vinci Programmes I and II can be found at :
http://europa.eu.int/comm/education/copenhagen/index_en.html

⁴ Thematic Monitoring : Since 2002, the European Commission and the Member States have been developing the thematic monitoring of projects within the framework of the Leonardo da Vinci Programme, to develop the necessary synergies and exchanges between projects, to gain a better overview of project content and to improve overall impact at both individual project and programme level.

Based on the priorities set out in the 2000–2002 call for proposals and on the current political priorities of the Commission, five themes were identified. Each theme is coordinated by a National Agency in close cooperation with the European Commission and in association with a group of National Agencies and the Socrates, Leonardo & Youth Technical Assistance Office. The five themes are:

- Integration into the Labour Market
- Development of Competencies and Skills within Companies and, in particular, within SMEs.
- Adaptation of the Training Supply and New Training Methods – Quality of Training
- Transparency, Assessment and Validation of Knowledge
- E-learning

For more information, please visit the following web address:

<http://www3.socleoyouth.be/static/en/leonardo/entrance.htm>

The grant requests should be made using the forms specifically designed for this purpose and which are appended to the text of the call at the same web site address. This documentation is available in English, French and German.

4. Presentation of the grant application

Only proposals submitted on the official application form (see Annex 1), completed in full, and received by the specified closing date will be considered.

Three copies of the grant application must be transmitted to the competent services of the Commission. Applications should provide complete information that can be checked against the criteria defined in points 5, 6 and 7.

All additional information that is considered necessary by the applicant can be included on separate sheets.

The application must be duly completed, signed (original signatures as required) and accompanied by an official letter from the applicant organisation as well as the documents proving its technical and financial capacity.

The grant application must include a detailed provisional budget (see Annex 2). All prices must be quoted in euro. Applicants from countries not participating in the Euro must use the conversion rates published in the Official Journal of the European Communities, C series, on the date of publication of this call.

The application must be sent to the address below by registered post by **28 June 2004** at the latest (as per postmark). Envelopes should be addressed as follows:

Call for proposals DG EAC/23/04
“Leonardo da Vinci Programme - Events for the Exploitation of Innovative Results”
European Commission
DG EAC B-7 05/05
B-1049 Brussels,
Belgium

Applications sent via Internet, fax or e-mail will not be accepted.

Applicants will be informed of the receipt of their proposals within 10 working days.

Only applications that fulfil the eligibility criteria will be considered for a possible grant. Ineligible applications will be responded to, indicating the reasons for their ineligibility.

All unsuccessful applicants will be informed in writing. The results of the selection will be communicated as soon as possible after completion of the procedure, which should be by the end of August 2004.

The selected proposals will be subject to detailed financial examination, at which stage the Commission may request complementary information from the persons responsible for the proposed actions.

In the event of final approval by the Commission, a financial contract, drawn up in euro and detailing the conditions and level of funding, will be concluded between the Commission and the beneficiary. This contract (the original) must be signed and returned to the Commission immediately.

5. Eligibility and exclusion criteria

Submission of grant requests under this call is open in particular to European, national, regional and sectoral organisations, including European networks, meeting the eligibility criteria mentioned in points 5, 6 and 7 below, working in the field of Vocational Education and Training and wishing to organise events (conferences and exhibitions) in the specific areas covered by this call for proposals.

The coordinating/promoting institutions must possess a legal identity and must be established in one of the 15 EU Member States, in the states of EFTA/EEA (Iceland, Liechtenstein, Norway), and/or in Cyprus, Malta and the associated countries of Central and Eastern Europe: Bulgaria, Estonia, Hungary, Latvia, Lithuania, Poland, Czech Republic, Romania, Slovakia, Slovenia).

Applicants must certify (see point 6 of the Grant Request) that they are not in one of the situations listed in Article 93 and 94 of the Financial Regulation applicable to the general budget of the European Communities⁵ as detailed in point 3.2.

Applicants will be excluded from participating in this call for proposals if they are in one of the following situations:

- (a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- (c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- (d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;

⁵ Council Regulation (EC, Euratom) n° 1605/2002 of 25 June 2002.

- (e) they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interest;
- (f) they have been declared to be in serious breach of contract for failure to comply with their contractual obligations, following another procurement procedure or grant award procedure financed by the Community budget.

Applicants will be excluded from receiving the grant if, at the time of the grant award procedure, they are in one of the following situations:

- (a) are subject to a conflict of interest;
- (b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

According to Articles 93 to 96 of the Financial Regulation and Article 133 of the implementing rules, administrative and financial penalties which are effective, proportionate and dissuasive may be applied to applicants excluded for one of the above reasons.

6. Selection criteria

Proof of technical and financial capacity

The application form must be accompanied by the following documents:

- The profit and loss accounts of the applicant organisation, and the balance sheet for the last 3 financial years for which the accounts have been closed. The verification of financial capacity shall not apply to public bodies.
- A copy of its legally registered statutes or articles of association, as well as a copy of its official registration certificate where appropriate. These documents must be provided in one of the 11 official EU languages.
- CVs of the individuals organising the event giving details of relevant professional experience.
- Declaration on their honour from applicants, completed and signed, certifying that they exist as a legal person and have the financial and operational capacity to complete the proposed actions (see Point 6 of Grant Request).
- Declaration on their honour from applicants, completed and signed, certifying that they are not in one of the situations listed in Article 93 and 94 of the Financial Regulation (see Point 6 of Grant Request).
- The financial identification form (see Annex 3) completed by the beneficiary and certified by the bank (original signatures as required). This account or sub-account must make it possible to identify funds paid by the Commission. If the funds paid to this account yield interest or equivalent benefits under the law of the State on whose territory the account is opened, such interest or benefits shall, if they are generated by pre-financing payments, be recovered by the Commission as specified in Article II.16.4 of the contract.

7. Award criteria

The Commission will award the grants after having taken into consideration the following criteria:

7.1. Content of the proposals :

The following elements will be assessed:

- relevance of the content and anticipated results of the event (Conference/Exhibition) to the objectives of the Call ie contribution to the exploitation ('valorisation') of innovative results of Leonardo da Vinci projects; and to identifying and meeting identified training needs;
- quality of the proposed organisational structure and in particular its capacity to disseminate, valorise and ensure effective follow-up;
- number, profile and quality of participants at the event (range of existing and potential users/target groups, project promoters and partners, decision-makers at all levels, key players in the field of vocational training) ;
- quality and effectiveness of methodology, tools and practical approaches proposed for analysis and matching of products and user needs; and scope for standardisation/sustainability;
- European dimension of the event, measured in terms of contribution to the event's content and objectives; number of participants (promoters and users) from different countries participating in the Leonardo da Vinci programme; and potential expected impact;
- active involvement of organisations and presence of participants from candidate countries.

7.2. Organisational and budgetary aspects of the proposals :

The following elements will be assessed:

- work plan (for its clarity and its appropriateness with regard to the objectives and means proposed);
- project calendar;
- coherence of the budget with the work plan;
- monitoring and evaluation methodology;

8. Financial conditions

8.1 The budget available for this call is **€500,000**.

8.2 On the basis of this amount, the Directorate General for Education and Culture envisages supporting between 7 and 10 events with a maximum grant normally not exceeding €70,000 and covering in any case a maximum of 75% of the eligible costs. The contract will cover activities relating to events (conferences and exhibitions) to be organised between September 2004 and February 2005.

8.3 Payment modalities :

- a pre-financing payment of maximum 80% within 45 days after signature of the contract by the two parties concerned;
- the balance within 45 days after approval of the final report by the Commission.

According to the terms of the financial agreement, persons responsible for proposals approved and financed by the Commission must submit a final report on completion of the project. This report should provide a succinct but complete description of the proceedings, results and planned follow-up of the activities outlined in the proposal, including in particular the identification and assessment of any difficulties encountered in delivering any aspects of the event. The report should also be accompanied by any publications produced (brochures, teaching material, videos, multimedia, press clippings, website addresses etc.).

The final financial statement, annexed to the final report, should show real costs and receipts. The beneficiary must set up an accounting system for the co-financed action and keep all original supporting documents for possible auditing for a period of five years as from the date of completion of the agreement.

8.4 Financial guarantee :

The contracting authority may require the beneficiary to lodge a guarantee in advance in order to limit the financial risks connected with the payment of pre-financing. The guarantee shall be valid for a period sufficiently long to allow it to be activated. The guarantee shall be provided by an approved bank or financial institution established in one of the Member States.

The guarantee may be replaced by a joint and several guarantee by a third party or by the joint guarantee of the beneficiaries of an action who are parties to the same grant agreement.

The guarantee shall be denominated in euro.

It shall have the effect of making the bank or financial institution, third party or the other beneficiaries stand as irrevocable collateral security, or first-call guarantor of the grant beneficiary's obligations.

The guarantee shall be released as the pre-financing is gradually cleared against interim payments or payments of balances to the beneficiary in accordance with the conditions laid down in the grant agreement.

8.5 Eligible costs :

Only the following costs will be deemed as eligible, in so far as they are properly calculated and valued according to market conditions and that they can be identified and verified. They are direct costs incurred in the implementation of the project:

- personnel costs for working on the implementation of the actions described in the proposal;
- travel, accommodation and subsistence per diem (see Annex 4) costs related to the carrying out of the action;
- costs linked to the specific event (room hire, interpretation, etc.), to be detailed;
- publication and dissemination costs;
- other direct costs (please specify);
- general expenditure (overheads) up to a maximum of 7% of total eligible costs for the action.

8.6 Ineligible costs :

The following costs/expenditures will be excluded from the co-financing budget request:

- costs incurred by a third party and not reimbursed by the beneficiary organisation;
- contributions in kind which do not involve a financial transaction;
- expenditures related to infrastructure acquisition;
- expenditures not related to the specific activities of the project (notably, running costs and/or expenditures related to statutory obligations);
- expenditures which are clearly unnecessary or excessive;
- capital investment costs;
- general provision (for losses, possible future liabilities, etc); contingency reserve; debts owed; charges for financial service; exchange losses, unless specifically provided for in exceptional cases.

8.7 The grant may not have the purpose or effect of producing a profit for the beneficiary. Profit shall be defined as a surplus of receipts over the costs of the action in question when the request is made for final payment of a grant for an action.

8.8 The budget for the action or the operating budget attached to the application must have revenue and expenditure in balance and show clearly the costs which are eligible for financing from the Community budget.

8.9 The applicant shall indicate (see point 3 of the Grant Request) the sources and amounts of any other funding received or applied for in the same financial year for the same action or for any other action and for routine activities. One action may give rise to the award of only one grant from the budget to any one beneficiary.

9. Subcontracting and Award of procurement contracts

Where implementation of the assisted actions requires the award of procurement contracts, beneficiaries of grants shall request at least 3 offers from different tenders and shall award the contract to the tender offering best value for money, that is to say, to the tender offering the best price-quality ratio, in compliance with the principles of transparency and equal treatment for potential contractors, care being taken to avoid any conflict of interests.

10. Ex-post publicity

10.1 All grants awarded in the course of a financial year, except scholarships paid to natural persons, shall be published on the Internet site of the Community institutions during the first half of the year following the closure of the budget year in respect of which they were awarded.

In cases where management is delegated to the bodies referred to in Article 54 of the Financial Regulation, reference shall be made at least to the address of the web site where this information can be found if it is not published directly on the Internet site of the Community institutions.

The information may also be published by any other appropriate medium, including the Official Journal of the European Communities.

10.2 The following shall be published with the agreement of the beneficiary (see point 6 of the Grant Request):

- (a) the name and address of the beneficiaries;
- (b) the subject of the grant;
- (c) the amount awarded and the rate of funding of the costs of the action or approved work programme.

11. Contact for Further information

11.1 In the event that potential applicants have any questions concerning the detail of this call or requests for further information, please write to: unite-B3@cec.eu.int

12. Annexes

1. Grant Request Form
2. Budget Breakdown Form
3. Financial Identification Form
4. Table of Per Diem Subsistence Cost



EUROPEAN COMMISSION
Directorate-General for Education and Culture
Vocational training
Application and dissemination of innovation

GRANT REQUEST

Awarding of grants for the organisation of events (seminars and conferences) for the exploitation of innovative results from the Leonardo da Vinci Programme.

YEAR: 2004

The grant request is made up of 3 parts:

- Part 1: this request form (6 pages),
- Part 2 : the Budget Breakdown form (10 pages),
- Part 3 : the Financial Identification form (1 page) and

These 3 parts must be sent to the address below by ordinary or registered post by **5 March 2004** at the latest (as per postmark). Envelopes should be addressed as follows:

Call for proposals DG EAC/88/03

“Leonardo da Vinci Programme - Events for the Exploitation of Programme and Project Results”

Technical Assistance Office – Socrates, Leonardo and Youth

59-61 rue de Treves

B-1040 Brussels, Belgium

**THE AGREEMENT TO BE SIGNED IS BASED ON THE
CONTENTS OF THIS GRANT REQUEST FORM.
PLEASE DO NOT MAKE ANY MODIFICATIONS TO ANY PART OF
THIS FORM!**

Country:

TYPE OF APPLICATION

Grant for activities (namely organisation of events such as conferences and seminars) for the exploitation of innovative results from the Leonardo da Vinci programme.

1. DETAILS OF THE APPLICANT

1.1 Exact name of the body applying for the grant (the contract shall be issued in this name)
Name :
Address :
Town : Post code :
Region: :
Country :
Telephone : () Fax : ()
E-mail :

1.2 Address for correspondence, if different from 1.1.:
Name :
Address :
Town : Post code :
Region: :
Country :
Telephone : () Fax : ()
E-mail :

1.3 Legal status of the applicant:

1.4 Type of applicant body
Please select one of the categories below:

- National authority
- Regional authority
- Local authority
- Other (please specify):

Country:

1.5 Person in charge of the administration of the project

Surname : First name(s) :
Title (position) :
Telephone : () Fax : ()
E-mail :

1.6 Person in charge of the finances

Surname : First name(s) :
Title (position) :
Telephone : () Fax : ()
E-mail :

1.7 Person authorised to sign the agreement

Surname : First name(s) :
Title (position) :
Telephone : () Fax : ()
E-mail :

1.8 Applicant's bank details

Please complete the enclosed form “Financial Identification” and return as Annex 1.

1.9 Relations with funding under “Leonardo da Vinci”

- This organisation is not acting as national agency for the “Leonardo da Vinci” programme or part of it, and is not a partner in a project co-financed under “Leonardo da Vinci”.

- This organisation is acting as national agency for the “Leonardo da Vinci” programme or part of it, or is a partner in a project co-financed under “Leonardo da Vinci”, but all costs, including the staff costs, indicated in the budget form relate only to activities carried out in the framework of this specific event.

2. COMMENCEMENT AND COMPLETION DATES

Please indicate the period for which the grant is requested, including any preparatory work and time required for completion of the projects (workshops, information and promotion campaigns, data collection, etc.). Also take into consideration the time needed to receive justification documents for financial transactions.

Country:

Where appropriate, please use one separate sheet for each event (conference or seminar) you want to apply for.
Copy pages 4 and 5 as often as you need.

3.1. TITLE OF PROJECT

Please give the title of the planned project

3.2. DATE AND PLACE OF THE PROJECT

scheduled date(s):

country and town in which the event will be held:

3.3. BODIES PARTICIPATING IN THE ORGANISATION OF THE PROJECT

Please give basic details of any body participating in the organisation of the project (conference or seminar) and describe their role.

3.4. TARGET GROUP(S)

Please specify the target group(s) of the project for which the grant is being requested, i.e. the category or categories of persons who stand to benefit directly or indirectly from the event even if they do not participate in it directly.

- National implementation structures
- Decision-makers involved in training
- Actors involved in training
- Potential sending organisations
- Potential receiving organisations
- Final beneficiaries
- Social partners
- Other (please specify):

Country:

4. BUDGET

*Applications will only be valid if accompanied by an estimated budget breakdown for the project in question. The attached “**Budget Breakdown Form**” (Annex 2) (10 pages) should be used and the relevant instructions followed carefully. All amounts should be quoted in € (Euro).*

DO NOT MODIFY THE FORMULATION OF THE QUESTIONS

5. ANNEXES TO THE APPLICATION

The following annexes form an integral part of the application and must be included:

Annex 1: Bank details (please use the attached “**Financial Identification**” form)
DO NOT FORGET TO DATE/SIGN/ STAMP THE ANNEXES

Annex 2: Budget breakdown (please use the attached “**Budget Breakdown**” form)
DO NOT FORGET TO DATE/SIGN/ STAMP THE ANNEXES

6. DECLARATION

"I the undersigned hereby declare that the tenderer is not in one of the situations listed under point 5 of the Call for Proposals DG EAC/88/03."

"I the undersigned hereby agree with the publication of the information mentioned under point 10.2 of the Call for Proposals DG EAC/88/03."

"I the undersigned hereby declare the information in this application form to be true to the best of my knowledge and belief. The competent authorities of all the bodies participating in the project referred to in the application have given their agreement in writing to the content of the application as submitted."

Place:

Date:

Signature:

Name and title (position), in block capitals, of the person authorised to sign the contract:

Surname:

First name:

Title (position):

Official stamp of the applicant body:

Country :

Please do not write in this box
Project reference No:

I. EXPENDITURE

1. Staff

a) Category A (project manager, administrator, expert, consultant, etc.)

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

This column to be completed only when submitting the statement of expenditure

| Function in the project | Number of persons | Number of days/person (max. 22 days/month) | Amount in EURO per day/person (max. 450 €) | Total | | | |
|-------------------------|-------------------|--|--|----------------------|--|--|--|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Total | | | | Total (a) category A | | | |

b) Category B (assistance functions, etc.)

| Function in the project | Number of persons | Number of days/person (max. 22 days/month) | Amount in EURO per day/person (max. 250 €) | Total | | | |
|-------------------------|-------------------|--|--|----------------------|--|--|--|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Total | | | | Total (b) category B | | | |

Country :

Please do not write in this box

Project reference No:

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

c) Category C (secretaries, etc.)

| Function in the project | Number of persons | Number of days/person (max. 22 days/month) | Amount in EURO per day/person (max. 150 €) | Total |
|-------------------------|-------------------|--|--|-------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | | |

| | | | |
|--------------------------------|--|--|--|
| Total (c) category C | | | |
| Total Section 1 (a+b+c) | | | |

2. General expenditure

- Note: Only the applicant body's own costs directly incurred in the implementation of the project may be included in this section, up to a maximum of 7% of the total expenditure, section 2 excluded.
 -Please give details of the calculation method for the amount given in column "TOTAL" in the table below.

| | Total |
|---|-------|
| <i>a) Office supplies photocopies (amount x unit price)</i> | |
| <i>b) Telephone, fax Postal charges Telecommunication charges</i> | |
| <i>c) Computer equipment</i> | |

| | | | |
|--------------------------------|--|--|--|
| Total Section 2 (a+b+c) | | | |
|--------------------------------|--|--|--|

Country :

Please do not write in this box
Project reference No:

3. Travel and subsistence costs in connection with implementation of the project

- If the expenses are to cover the travel/subsistence costs of participants in "conferences or seminars" organised as part of the project, they should be entered under Section 4c1-4c3 of the form.

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

a) Travel

| Number of persons | Number of journeys | Mode of transport | Average cost per journey/person | Total |
|-------------------|--------------------|-------------------|---------------------------------|-------|
| | | | | |
| | | | | |
| | | | | |

| Origin | Destination |
|--------|-------------|
| | |
| | |
| | |

| | | | |
|------------------|--|--|--|
| Total (a) travel | | | |
|------------------|--|--|--|

b) Subsistence (accommodation and meals) + town/country

| Number of persons | Number of days | Average cost per day/person | Total |
|-------------------|----------------|-----------------------------|-------|
| | | | |
| | | | |
| | | | |

| Town | Country |
|------|---------|
| | |
| | |
| | |

| | | | |
|-----------------------|--|--|--|
| Total (b) subsistence | | | |
|-----------------------|--|--|--|

Country :

Please do not write in this box

Project reference No:

| | | | |
|-----------------------|----------------------|----------------------|----------------------|
| Total section 3 (a+b) | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|-----------------------|----------------------|----------------------|----------------------|

4. Costs in connection with conferences and seminars

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

a) Premises hire + city/country

| Number of premises | Number of days | Cost per day | Total |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | |
|-------------------------|----------------------|----------------------|----------------------|
| Total (a) premises hire | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|-------------------------|----------------------|----------------------|----------------------|

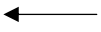
b) Equipment hire

| Type of equipment | Number of days hired | Average cost per day | Total |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | |
|---------------------|----------------------|----------------------|----------------------|
| Total (b) equipment | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|---------------------|----------------------|----------------------|----------------------|

c) Travel/subsistence costs for participants and speakers

| Origin | Number of persons |
|---|----------------------|
| European Commission ^(a) | <input type="text"/> |
| Other institutions, agencies and official bodies of the European Union (e.g. Council, European Parliament, etc.) ^(a) | <input type="text"/> |
| Country in which the conference/seminar is being held | <input type="text"/> |
| Other EU Member States - Please state the | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |



Before giving the breakdown of costs under headings **(c1)**, **(c2)** and **(c3)** please give precise details of the anticipated number of conference participants and speakers and their origin in the table opposite.

^(a) Please note that the travel and/or subsistence costs for conference participants and speakers in these categories are not eligible for reimbursement under the Leonardo da Vinci grant.

Country :

Please do not write in this box
Project reference No:

Total number of persons

Country :

Please do not write in this box
Project reference No:

c1) Travel expenses of conference participants and speakers

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

| Number of persons | Mode of transport | Average cost per journey | Arriving from | Total |
|-------------------|-------------------|--------------------------|---------------|-------|
| | | | | |
| | | | | |
| | | | | |

| | | | |
|-------------------|--|--|--|
| Total (c1) travel | | | |
|-------------------|--|--|--|

c2) Local transport

| Number of persons | Mode of transport | Average cost per journey/person | Total |
|-------------------|-------------------|---------------------------------|-------|
| | | | |
| | | | |
| | | | |

| | | | |
|----------------------------|--|--|--|
| Total (c2) local transport | | | |
|----------------------------|--|--|--|

c3) Subsistence (accommodation and meals for conference participants and speakers)

| Number of persons | Number of days | Average cost per day/person | Total |
|-------------------|----------------|-----------------------------|-------|
| | | | |
| | | | |
| | | | |

Country :

Please do not write in this box

Project reference No:

| | | | |
|------------------------|--|--|--|
| Total (c3) subsistence | | | |
|------------------------|--|--|--|

d) Interpretation

Languages from/into which interpretation will be required:

. interpretation from:

. interpretation into:

d1) Interpreters

| Number of interpreters | Number of days | Cost /day/person (max. 550 €) |
|------------------------|----------------|----------------------------------|
| | | |

| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|
|------------------------|------------------------------|--------------------------|

| | | | |
|-------------------------|--|--|--|
| Total (d1) interpreters | | | |
|-------------------------|--|--|--|

d2) Booths (hire)

| Hire of booths | Number of days | Cost /day/person |
|----------------|----------------|------------------|
| | | |

| | | | |
|-------------------|--|--|--|
| Total (d2) booths | | | |
|-------------------|--|--|--|

e) External consultants' fees

| Number of consultants | Number of days | Cost /day/person (max. 450 €) |
|-----------------------|----------------|----------------------------------|
| | | |

| | | | |
|-----------------------|--|--|--|
| Total (e) consultants | | | |
|-----------------------|--|--|--|

f) Reception staff

| Number of persons | Number of days | Cost /day/person |
|-------------------|----------------|------------------|
| | | |

| | | | |
|---------------------------|--|--|--|
| Total (f) reception staff | | | |
|---------------------------|--|--|--|

g) Documentation distributed to participants

| Number of pages | Number of copies | Unit price |
|-----------------|------------------|------------|
| | | |

Country :

Please do not write in this box

Project reference No:

| | | | |
|--------------------------|--|--|--|
| Total (g) documentation | | | |
|--------------------------|--|--|--|

Country :

Please do not write in this box
Project reference No:

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

h) Supplies

| Type | Number | Unit price | Total |
|------|--------|------------|-------|
| | | | |
| | | | |
| | | | |

| | | | |
|--------------------|--|--|--|
| Total (h) supplies | | | |
|--------------------|--|--|--|

i) Other running costs (please specify)

.....

| Total |
|-------|
| |
| |

| | | | |
|-----------------------|--|--|--|
| Total (i) other costs | | | |
|-----------------------|--|--|--|

| | | | |
|---|--|--|--|
| Total Section 4 (total items (a) to (i)) | | | |
|---|--|--|--|

5. Production, dissemination and information costs

Beware : no staff expenditure under this heading.

a) Production costs

| Type (publications, books, CD-ROM, video, Internet, etc.) (1) | Number of pages | Number of copies | Unit price | Total |
|---|-----------------|------------------|------------|-------|
| | | | | |
| | | | | |
| | | | | |

| | | | |
|----------------------|--|--|--|
| Total (a) production | | | |
|----------------------|--|--|--|

Country :

Please do not write in this box
Project reference No:

(1) Please give details of the content in the annex

b) Translation costs

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

| Language (from..... into | Number of pages | Price per page | Total |
|-----------------------------------|-----------------|----------------|-------|
| | | | |
| | | | |
| | | | |

| | | | |
|-----------------------|--|--|--|
| Total (b) translation | | | |
|-----------------------|--|--|--|

| | |
|--|-------|
| <i>c) Distribution costs : please specify the calculation method</i> | Total |
| | |

Please give details in the annex.

| | | | |
|------------------------|--|--|--|
| Total (c) distribution | | | |
|------------------------|--|--|--|

| | |
|--|-------|
| <i>d) Other dissemination costs (please specify) + indicate calculation method</i> | Total |
| | |
| | |

| | | | |
|-------------------------------------|--|--|--|
| Total (d) other dissemination costs | | | |
|-------------------------------------|--|--|--|

| | | | |
|----------------------------------|--|--|--|
| Total Section 5 (a+b+c+d) | | | |
|----------------------------------|--|--|--|

6. Other (please specify) + indicate calculation method

| | |
|-------|-------|
| | Total |
| | |
| | |

| | | | |
|------------------------|--|--|--|
| Total Section 6 | | | |
|------------------------|--|--|--|

Expenditure - grand total

| | | |
|--|--|--|
| | | |
|--|--|--|

Country :

Please do not write in this box
Project reference No:

II. REVENUE

1. Specific subsidies

(a) European Commission (Leonardo da Vinci), (i.e. the grant for which this application is being submitted)

(b) European Commission: other programmes or actions (cf. question 3.7. of the grant application form)

(c) International public institutions

Please specify:
.....
.....

(d) National/regional/local public institutions

Please specify:
.....
.....

(e) Private companies

(f) Other

Please specify:
.....
.....

Total (1) subsidies
(total for items (a) to (f))

| Estimated total budget | Actual revenue |
|------------------------|----------------|
|------------------------|----------------|

This column to be completed only when submitting the statement of expenditure

| | |
|--|--|
| | |
|--|--|

| | |
|--|--|
| | |
|--|--|

| | |
|--|--|
| | |
|--|--|

| | |
|--|--|
| | |
|--|--|

| | |
|--|--|
| | |
|--|--|

| | |
|--|--|
| | |
|--|--|

Please do not write in this box

Project reference No:

To be signed when submitting the
budget estimate

Certified truthful and accurate

Name:

Position within the applicant body:

Date:

Signature:

Official stamp of the applicant body



To be signed when submitting the
final cost breakdown

Certified truthful and accurate

Name:

Position within the applicant body:

Date:

Signature:

Official stamp of the applicant body





EUROPEAN COMMISSION
Directorate-General for Education and Culture
Vocational training
Application and dissemination of innovation

GRANT REQUEST

**Awarding of grants for the organisation of events
(conferences and exhibitions) for the exploitation of
innovative results from the Leonardo da Vinci Programme.**

YEAR: 2004

The grant request is made up of 3 parts:

- Part 1 : this request form (9 pages),
- Part 2 : the Budget Breakdown form (10 pages),
- Part 3 : the Financial Identification form (1 page)

These 3 parts must be sent to the address below by registered post by **28 June 2004** at the latest (as per postmark). Envelopes should be addressed as follows:

**Call for proposals DG EAC/23/04
“Leonardo da Vinci Programme - Events for the Exploitation of
Programme and Project Results”
European Commission
DGEAC B-7 05/05
B-1049 Brussels,
Belgium**

**THE AGREEMENT TO BE SIGNED IS BASED ON THE
CONTENTS OF THIS GRANT REQUEST FORM.
PLEASE DO NOT MAKE ANY MODIFICATIONS TO ANY PART OF
THIS FORM!**

Country:

TYPE OF APPLICATION

Grant for activities (namely organisation of events such as conferences and/or exhibitions) for the exploitation of innovative results from the Leonardo da Vinci programme.

1. DETAILS OF THE APPLICANT

1.1 Exact name of the body applying for the grant (the contract shall be issued in this name)

Name :
Address :
Town : Post code :
Region: :
Country :
Telephone : () Fax : ()
E-mail :

1.2 Address for correspondence, if different from 1.1.:

Name :
Address :
Town : Post code :
Region: :
Country :
Telephone : () Fax : ()
E-mail :

1.3 Legal status of the applicant:

1.4 Type of applicant body

Please select one of the categories below:

- National authority
- Regional authority
- Local authority
- Other (please specify):

Country:

1.5 Person in charge of the administration of the project

Surname : First name(s) :
Title (position) :
Telephone : () Fax : ()
E-mail :

1.6 Person in charge of the finances

Surname : First name(s) :
Title (position) :
Telephone : () Fax : ()
E-mail :

1.7 Person authorised to sign the agreement

Surname : First name(s) :
Title (position) :
Telephone : () Fax : ()
E-mail :

1.8 Applicant's bank details

Please complete the enclosed form “Financial Identification” and return as Annex 1.

1.9 Relations with funding under “Leonardo da Vinci”

- This organisation is not acting as national agency for the “Leonardo da Vinci” programme or part of it, and is not a partner in a project co-financed under “Leonardo da Vinci”.

- This organisation is acting as national agency for the “Leonardo da Vinci” programme or part of it and all costs, including the staff costs, indicated in the budget form relate only to activities carried out in the framework of this specific event.

- This organisation is a partner in a project co-financed under “Leonardo da Vinci”, and all costs, including the staff costs, indicated in the budget form relate only to activities carried out in the framework of this specific event.

2. COMMENCEMENT AND COMPLETION DATES

Please indicate the period for which the grant is requested, including any preparatory work and time required for completion of the projects (workshops, information and promotion campaigns, data collection, etc.). Also take into consideration the time needed to receive justification documents for financial transactions.

2.1 Start of Activities :

Country:

2.2 Completion of Activities :

3. PROPOSAL DETAILS

Where appropriate, please use one separate sheet for each event (conference or exhibition) you want to apply for.

3.1 Title of event

Please give the title of the event

3.2 Date and place of planned event(s)

Scheduled date(s):

Country and town in which the event(s) will be held:

3.3 Bodies participating in the organisation of the event

Please list any bodies participating in the organisation of the event (conference and/or exhibition) and briefly describe their role.

3.4 Detailed description of the event(s)

Please describe the content of the planned event(s) and attach a draft outline programme (if available).

Country:

3.5 Target Group(s)

Please specify the target group(s), i.e. the category or categories of persons who stand to benefit directly or indirectly from the event even if they do not participate in it directly.

- National implementation structures
- Decision-makers involved in training
- Actors involved in training
- Project promoters
- Potential new users
- Final beneficiaries
- Social partners
- Other (please specify):

3.6 Participants

Please specify who you will invite to the event(s), including their status,, origin (country, type of organisation) and numbers in each category expected to attend.

| Participant | Number | Country(ies) |
|---|---------------|---------------------|
| Representatives of European Institutions | | |
| Representatives of national and/or regional authorities | | |
| Decision-makers involved in training | | |
| Actors involved in training | | |

| |
|-----------------|
| Country: |
|-----------------|

| | | |
|----------------------------------|--|--|
| Project promoters | | |
| Potential new users | | |
| Final beneficiaries | | |
| Social partners | | |
| Other (please specify): | | |
| | | |
| | | |

3.7 New Users

There should be potential new users among the event participants. Please describe these participants in more detail and explain briefly how you have identified these new users and their training requirements (evidence of analysis of needs etc).

3.8 Choice of Leonardo da Vinci participants

Please briefly describe how you will identify and select the Leonardo da Vinci projects to be presented at the event(s) or if you have already selected the Leonardo da Vinci projects to be presented at the event(s), please list the projects and the reasons for choosing them. How will these projects meet the identified needs of the potential new users?

3.9 Follow-up activities

Please describe the follow-up activities planned to ensure the successful exploitation of the products presented at the event(s) to meet new user needs.

Country:

4. BUDGET

*Applications will only be valid if accompanied by an estimated budget breakdown for the project in question. The attached “**Budget Breakdown Form**” (Annex 2) (10 pages) should be used and the relevant instructions followed carefully. All amounts should be quoted in € (Euro).*

DO NOT MODIFY THE FORMULATION OF THE QUESTIONS

5. ANNEXES TO THE APPLICATION

The following annexes form an integral part of the application and must be included:

Annex 1: Bank details (please use the attached “**Financial Identification**” form)
DO NOT FORGET TO DATE/SIGN/ STAMP THE ANNEXES

Annex 2: Budget breakdown (please use the attached “**Budget Breakdown**” form)
DO NOT FORGET TO DATE/SIGN/ STAMP THE ANNEXES

Do not forget to provide proof of your technical and financial capacity as requested in Section 6 of the Call for Proposals (profit and loss accounts and balance sheets for previous 3 financial years, copy of statute or articles of association, CV of individuals responsible for organising the event).

6. DECLARATION

"I the undersigned hereby declare that the applicant is not in one of the situations listed under point 5 of the Call for Proposals DG EAC/23/04"

"I the undersigned hereby agree with the publication of the information mentioned under point 10.2 of the Call for Proposals DG EAC/23/04"

"I the undersigned hereby declare that the applicant organisation exists as a legal person and has the financial and operational capacity to complete the proposed actions"

"I the undersigned hereby declare the information in this application form to be true to the best of my knowledge and belief. The competent authorities of all the bodies participating in the project referred to in the application have given their agreement in writing to the content of the application as submitted".

Place:

Date:

Signature:

Country:

Name and title (position), in block capitals, of the person authorised to sign the contract:

Surname:

First name:

Title (position):

Official stamp of the applicant body:

Country :

Please do not write in this box
Project reference No:

I. EXPENDITURE

1. Staff

a) Category A (project manager, administrator, expert, consultant, etc.)

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

This column to be completed only when submitting the statement of expenditure

| Function in the project | Number of persons | Number of days/person (max. 22 days/month) | Amount in EURO per day/person (max. 450 €) | Total | | | |
|-------------------------|-------------------|--|--|----------------------|--|--|--|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Total | | | | Total (a) category A | | | |

b) Category B (assistance functions, etc.)

| Function in the project | Number of persons | Number of days/person (max. 22 days/month) | Amount in EURO per day/person (max. 250 €) | Total | | | |
|-------------------------|-------------------|--|--|----------------------|--|--|--|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Total | | | | Total (b) category B | | | |

Country :

Please do not write in this box

Project reference No:

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

c) Category C (secretaries, etc.)

| Function in the project | Number of persons | Number of days/person (max. 22 days/month) | Amount in EURO per day/person (max. 150 €) | Total |
|-------------------------|-------------------|--|--|-------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | | |

| | | | |
|--------------------------------|--|--|--|
| Total (c) category C | | | |
| Total Section 1 (a+b+c) | | | |

2. General expenditure

- Note: Only the applicant body's own costs directly incurred in the implementation of the project may be included in this section, up to a maximum of 7% of the total expenditure, section 2 excluded.
 -Please give details of the calculation method for the amount given in column "TOTAL" in the table below.

| | Total |
|---|-------|
| <i>a) Office supplies photocopies (amount x unit price)</i> | |
| <i>b) Telephone, fax Postal charges Telecommunication charges</i> | |
| <i>c) Computer equipment</i> | |

| | | | |
|--------------------------------|--|--|--|
| Total Section 2 (a+b+c) | | | |
|--------------------------------|--|--|--|

Country :

Please do not write in this box
Project reference No:

3. Travel and subsistence costs in connection with implementation of the project

- If the expenses are to cover the travel/subsistence costs of participants in "conferences or seminars" organised as part of the project, they should be entered under Section 4c1-4c3 of the form.

a) Travel

| Number of persons | Number of journeys | Mode of transport | Average cost per journey/person | Total |
|-------------------|--------------------|-------------------|---------------------------------|-------|
| | | | | |
| | | | | |
| | | | | |

| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|
|------------------------|------------------------------|--------------------------|

| Origin | Destination |
|--------|-------------|
| | |
| | |
| | |

| | | | |
|------------------|--|--|--|
| Total (a) travel | | | |
|------------------|--|--|--|

b) Subsistence (accommodation and meals) + town/country

| Number of persons | Number of days | Average cost per day/person | Total |
|-------------------|----------------|-----------------------------|-------|
| | | | |
| | | | |
| | | | |

| Town | Country |
|------|---------|
| | |
| | |
| | |

| | | | |
|-----------------------|--|--|--|
| Total (b) subsistence | | | |
|-----------------------|--|--|--|

Country :

Please do not write in this box

Project reference No:

| | | | |
|-----------------------|----------------------|----------------------|----------------------|
| Total section 3 (a+b) | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|-----------------------|----------------------|----------------------|----------------------|

4. Costs in connection with conferences and seminars

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

a) Premises hire + city/country

| Number of premises | Number of days | Cost per day | Total |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | |
|-------------------------|----------------------|----------------------|----------------------|
| Total (a) premises hire | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|-------------------------|----------------------|----------------------|----------------------|

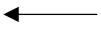
b) Equipment hire

| Type of equipment | Number of days hired | Average cost per day | Total |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | |
|---------------------|----------------------|----------------------|----------------------|
| Total (b) equipment | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|---------------------|----------------------|----------------------|----------------------|

c) Travel/subsistence costs for participants and speakers

| Origin | Number of persons |
|---|----------------------|
| European Commission ^(a) | <input type="text"/> |
| Other institutions, agencies and official bodies of the European Union (e.g. Council, European Parliament, etc.) ^(a) | <input type="text"/> |
| Country in which the conference/seminar is being held | <input type="text"/> |
| Other EU Member States - Please state the | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |



Before giving the breakdown of costs under headings **(c1)**, **(c2)** and **(c3)** please give precise details of the anticipated number of conference participants and speakers and their origin in the table opposite.

^(a) Please note that the travel and/or subsistence costs for conference participants and speakers in these categories are not eligible for reimbursement under the Leonardo da Vinci grant.

Country :

Please do not write in this box
Project reference No:

Total number of persons

Country :

Please do not write in this box
Project reference No:

c1) Travel expenses of conference participants and speakers

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

| Number of persons | Mode of transport | Average cost per journey | Arriving from | Total |
|-------------------|-------------------|--------------------------|---------------|-------|
| | | | | |
| | | | | |
| | | | | |

| | | | |
|-------------------|--|--|--|
| Total (c1) travel | | | |
|-------------------|--|--|--|

c2) Local transport

| Number of persons | Mode of transport | Average cost per journey/person | Total |
|-------------------|-------------------|---------------------------------|-------|
| | | | |
| | | | |
| | | | |

| | | | |
|----------------------------|--|--|--|
| Total (c2) local transport | | | |
|----------------------------|--|--|--|

c3) Subsistence (accommodation and meals for conference participants and speakers)

| Number of persons | Number of days | Average cost per day/person | Total |
|-------------------|----------------|-----------------------------|-------|
| | | | |
| | | | |
| | | | |

Country :

Please do not write in this box

Project reference No:

| | | | |
|------------------------|----------------------|----------------------|----------------------|
| Total (c3) subsistence | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|------------------------|----------------------|----------------------|----------------------|

d) Interpretation

Languages from/into which interpretation will be required:

. interpretation from:

. interpretation into:

d1) Interpreters

| Number of interpreters | Number of days | Cost /day/person (max. 550 €) |
|------------------------|----------------------|----------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

| | | | |
|-------------------------|----------------------|----------------------|----------------------|
| Total (d1) interpreters | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|-------------------------|----------------------|----------------------|----------------------|

d2) Booths (hire)

| Hire of booths | Number of days | Cost /day/person |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | |
|-------------------|----------------------|----------------------|----------------------|
| Total (d2) booths | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|-------------------|----------------------|----------------------|----------------------|

e) External consultants' fees

| Number of consultants | Number of days | Cost /day/person (max. 450 €) |
|-----------------------|----------------------|----------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | |
|-----------------------|----------------------|----------------------|----------------------|
| Total (e) consultants | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|-----------------------|----------------------|----------------------|----------------------|

f) Reception staff

| Number of persons | Number of days | Cost /day/person |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | |
|---------------------------|----------------------|----------------------|----------------------|
| Total (f) reception staff | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|---------------------------|----------------------|----------------------|----------------------|

g) Documentation distributed to participants

| Number of pages | Number of copies | Unit price |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Country :

Please do not write in this box

Project reference No:

| | | | |
|--------------------------|--|--|--|
| Total (g) documentation | | | |
|--------------------------|--|--|--|

Country :

Please do not write in this box
Project reference No:

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

h) Supplies

| Type | Number | Unit price | Total |
|------|--------|------------|-------|
| | | | |
| | | | |
| | | | |

| | | | |
|--------------------|--|--|--|
| Total (h) supplies | | | |
|--------------------|--|--|--|

i) Other running costs (please specify)

.....

| Total |
|-------|
| |
| |

| | | | |
|-----------------------|--|--|--|
| Total (i) other costs | | | |
|-----------------------|--|--|--|

| | | | |
|---|--|--|--|
| Total Section 4 (total items (a) to (i)) | | | |
|---|--|--|--|

5. Production, dissemination and information costs

Beware : no staff expenditure under this heading.

a) Production costs

| Type (publications, books, CD-ROM, video, Internet, etc.) (1) | Number of pages | Number of copies | Unit price | Total |
|---|-----------------|------------------|------------|-------|
| | | | | |
| | | | | |
| | | | | |

| | | | |
|----------------------|--|--|--|
| Total (a) production | | | |
|----------------------|--|--|--|

Country :

Please do not write in this box
Project reference No:

(1) Please give details of the content in the annex

b) Translation costs

| | | |
|------------------------|------------------------------|--------------------------|
| Estimated total budget | Commission subsidy requested | Total actual expenditure |
|------------------------|------------------------------|--------------------------|

| Language (from..... into | Number of pages | Price per page | Total |
|-----------------------------------|-----------------|----------------|-------|
| | | | |
| | | | |
| | | | |

| | | | |
|-----------------------|--|--|--|
| Total (b) translation | | | |
|-----------------------|--|--|--|

| | |
|--|-------|
| <i>c) Distribution costs : please specify the calculation method</i> | Total |
| | |

Please give details in the annex.

| | | | |
|------------------------|--|--|--|
| Total (c) distribution | | | |
|------------------------|--|--|--|

| | |
|--|-------|
| <i>d) Other dissemination costs (please specify) + indicate calculation method</i> | Total |
| | |
| | |

| | | | |
|-------------------------------------|--|--|--|
| Total (d) other dissemination costs | | | |
|-------------------------------------|--|--|--|

| | | | |
|----------------------------------|--|--|--|
| Total Section 5 (a+b+c+d) | | | |
|----------------------------------|--|--|--|

6. Other (please specify) + indicate calculation method

| | |
|-------|-------|
| | Total |
| | |
| | |

| | | | |
|------------------------|--|--|--|
| Total Section 6 | | | |
|------------------------|--|--|--|

Expenditure - grand total

| | | |
|--|--|--|
| | | |
|--|--|--|

Country :

Please do not write in this box
Project reference No:

II. REVENUE

1. Specific subsidies

(a) European Commission (Leonardo da Vinci), (i.e. the grant for which this application is being submitted)

| | |
|------------------------|----------------|
| Estimated total budget | Actual revenue |
| | |

This column to be completed only when submitting the statement of expenditure

(b) European Commission: other programmes or actions (cf. question 3.7. of the grant application form)

| | |
|------------------------|----------------|
| Estimated total budget | Actual revenue |
| | |

(c) International public institutions

| | |
|------------------------|----------------|
| Estimated total budget | Actual revenue |
| | |

Please specify:
.....
.....

(d) National/regional/local public institutions

| | |
|------------------------|----------------|
| Estimated total budget | Actual revenue |
| | |

Please specify:
.....
.....

(e) Private companies

| | |
|------------------------|----------------|
| Estimated total budget | Actual revenue |
| | |

(f) Other

| | |
|------------------------|----------------|
| Estimated total budget | Actual revenue |
| | |

Please specify:
.....
.....

| | | |
|--|--|--|
| Total (1) subsidies (total for items (a) to (f)) | | |
|--|--|--|

Country :

Please do not write in this box
Project reference No:

| | |
|------------------------|----------------|
| Estimated total budget | Actual revenue |
|------------------------|----------------|

2. Revenue generated by the project

| | |
|-----------------------|----------------------|
| (a) Registration fees | <input type="text"/> |
|-----------------------|----------------------|

| | |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|

| | |
|--------------------------|----------------------|
| (b) Sale of publications | <input type="text"/> |
|--------------------------|----------------------|

| | |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|

| |
|----------------------------|
| (c) Other (please specify) |
|----------------------------|

| | |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|

| | |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|

| | |
|-------------|----------------------|
| Total other | <input type="text"/> |
|-------------|----------------------|

| | |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|

| | | |
|---|----------------------|----------------------|
| Total (2) revenue generated by the projet (a + b + c) | <input type="text"/> | <input type="text"/> |
|---|----------------------|----------------------|

3. Self-financing by the applicant

| | | |
|---|----------------------|----------------------|
| Total (3) self-financing by the project (a + b + c) | <input type="text"/> | <input type="text"/> |
|---|----------------------|----------------------|

Revenue - grand total (1+2+3)

| | |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|

Name and title (position), in block capitals, of the person authorised to sign the contract:

Surname : **First name :** **Title (position) :**

Place and date : **Signature :** **Official stamp of the applicant body :**

Please do not write in this box

Project reference No:

To be signed when submitting the
budget estimate

Certified truthful and accurate

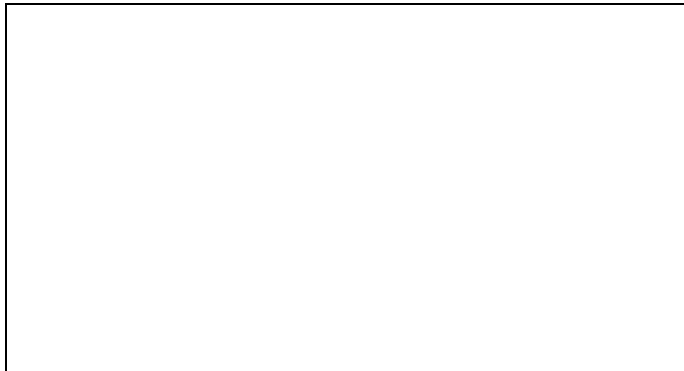
Name:

Position within the applicant body:

Date:

Signature:

Official stamp of the applicant body



To be signed when submitting the
final cost breakdown

Certified truthful and accurate

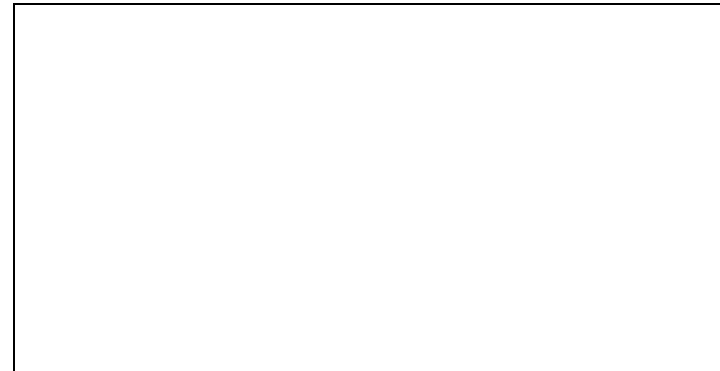
Name:

Position within the applicant body:

Date:

Signature:

Official stamp of the applicant body



Guideline

Call for Proposal EAC/88/03 – Organisation of events (seminars and conferences) for the exploitation of innovative results from the Leonardo da Vinci (LdV) programme

What is the Call about? We (EAC/B3) want to co-fund 7-10 events which showcase good results from LdV projects, matching project promoters and products with targeted potential new users (supply and demand). We are offering a maximum of 75% co-funding, to a ceiling of 70,000 Euro, for quality proposals which will facilitate the transfer and exploitation of innovative results in new situations and to meet new user requirements.

What's my role? You have been nominated to participate in the evaluation of the proposals received under the above call. In view of the nature of the Call, no external experts will read the proposals. We have therefore requested interested parties from other units and DGs to take part in the Selection Committee to ensure a balanced and objective assessment procedure.

What do I have to do? You will need to read between around 4 proposals to assess the **content** and then fill in the attached reading grid for each project to the best of your abilities and **expertise**.

Is my assessment final? No. Each proposal will be read twice. Any discrepancies in the markings will be discussed and moderated 'in session' by the Selection Committee. The Committee will make the final recommendations on the projects to be funded.

How do I fill in the grid? The grid consists of **17 questions** that reflect the most important requirements in the call, and rating columns from **1 to 20 points** divided in four groups represented by colour: **bad/red, weak/orange, good/yellow, excellent/green**. Finally there is a last column for your **comments and justifications**.

You should rate the proposal against each question and fill in the grid electronically or manually by colouring the boxes corresponding to your rating points. e.g. you find the profile of the users invited weak at 8 points so you fill in the box up to 8 points (if you do it electronically you colour the box in orange). Do not forget to fill in the comments and justification box: e.g. among the users there are few new users. This is important as your comments will be used as the basis for the required feedback to the applicants.

Guide to the questions

Below you will find a short explanation of what we are looking for. Please remember that, even if, for example, you know the subject area and/or feel that the application does not do the applicant merit, you are nevertheless required to assess **ONLY** what is written in the proposal. Answer the questions to the best of your ability, with comments and with reference to specific elements in the proposal. If you feel that you do not have the expertise or experience to answer any of the questions, please mark this in your assessment form.

AD 1 and 2) You should examine the applicants' understanding of **valorisation** as set out in their proposal. It is quite a new concept in the LdV programme and we need to find methodologies implement it on the ground. This call is one of our instruments for doing this.

Guideline

Valorisation goes beyond pure dissemination, proposing a systematic approach to the exploitation and transformation of existing innovative products for use in new contexts and to meet new users' requirements. To evaluate the applicants' understanding of valorisation, you can check if the proposal contains the following stages needed in a valorisation process:

- a focus on end user/target group needs from project inception;
- dissemination of innovative training products and results;
- selection and analysis of their suitability for transfer to meet identified new needs;
- translation and adaptation to targeted new contexts;
- piloting and experimentation;
- leading to full integration into the new context.

AD 3, 4 and 5) The purpose of organising events and conferences is not to just the presentation of some final products. It is more about creating a vehicle for constructive and focused exchanges between an appropriate mix of existing products and targeted new users. You should consider therefore whether the approaches and methodologies for identifying a particular combination of products and users is robust and convincing, and if the products are likely to meet the requirements of the targeted new users. Where the proposal has already identified the products and users, does this seem well-founded? Are there enough products and users (is the scale of the event worth bothering about).

AD 6 and 7) To evaluate the results and their impact it is important to know if the products are still in use and by how many users of different group of users. Do you think the promoters have come up with something new and original? The conferences/seminars should in the end lead to transfer of new innovative products. According to the LdV evaluation handbook an innovative proposal is one which convincingly demonstrates that, if financed, its results can bring an **original and significant contribution to European and national vocational training systems and practices**; in other words, is the proposal likely to create something new with respect to existing practices, methods, products, etc. and that, by doing so, can significantly contribute to improving the quality of vocational training.

AD 8, 9 and 10) To evaluate the impact of the conferences you should look at the numbers and the profile of the invited persons; representatives of different areas of vocational training, decision makers at all levels and from other countries.

AD 12) The conferences may not immediately lead to a final result so it is compulsory that the proposal contains indications of how the follow up of the events will be organised, with what activities and what support etc.

AD 13) The proposal may have a link to one of the following themes LdV Thematic Monitoring: 1) Integration into the Labour Market, 2) Development of competencies and skills within companies (SME's), 3) Adaptation of the training supply and new training methods – quality of training, 4) Transparency, assessment and validation of knowledge and 5) E-learning. It may also be organised on a sectoral basis. These are optional requirements, but they may come into play in deciding between projects all other things being equal.

Guideline

AD 15, 16 and 17) You will want to have a look through the work programme and financial plan annexed to the Grant Request form to get a feel for whether everything hangs together and to check for any obvious anomalies.

Some further clarifications:

We are looking for events which bring together a 'critical mass' of projects and users for optimum results. A proposal built around dissemination of one or two LdV products is not suitable.

A trans-national/European dimension is important, but this will be achieved through the participants at the event rather than through the organisational structure. We are not looking for the standard LdV-style multiple partnership and individual organisations can apply by themselves. A well-argued and justified proposal which focuses on areas of geographic proximity is also acceptable.

Funding is available for the preparatory and follow-up work around the event (eg identification and analysis of needs/users/projects/products; follow-up activities) and for activities which will enhance the impact of the event eg complementary project exhibition.

Thank you for your participation
Janette Sinclair

Guideline

Call for Proposal EAC/23/04 – Organisation of events (conferences and exhibitions) for the exploitation of innovative results from the Leonardo da Vinci (LdV) programme

Q and A for the evaluators

What is the Call about? We (EAC/B3) want to co-fund 10-12 events which showcase good results from LdV projects, matching project promoters and products with targeted potential new users (supply and demand). We are offering a maximum of 75% co-funding, to a ceiling of 70,000 Euro, for quality proposals which will facilitate the transfer and exploitation of innovative results in new situations and to meet new user requirements.

What's my role? You have been nominated to participate in the evaluation of the proposals received under the above call. In view of the nature of the Call, no external experts will read the proposals. We have therefore requested interested parties from other units to take part in the Selection Committee to ensure a balanced and objective assessment procedure.

What do I have to do? You will need to read a number of proposals (allocated depending on your availability etc) to assess the **content** and then fill in the attached reading grid for each project to the best of your abilities and expertise.

Is my assessment final? No. Each proposal will be read twice. Any discrepancies in the markings will be discussed and moderated 'in session' by the Selection Committee. The Committee will make the final recommendations on the projects to be funded. You are de facto a member of the Selection Committee. If you cannot attend the Selection Committee (23 July), please make sure that you raise any issues with Janette Sinclair beforehand.

How do I fill in the grid? The grid consists of **10 questions** that reflect the most important requirements in the call, and rating columns from **1 to 20 points** divided in four groups represented by colour: **bad/red, weak/orange, good/yellow, excellent/green**. There is a 'total' column for each question. Finally there is a last column for your **comments and justifications**.

You should rate the proposal against each question and fill in the grid electronically or manually by colouring the boxes corresponding to your rating points. e.g. you find the profile of the users invited weak, you allocate 8 points for this question, so you fill in the box up to 8 points (if you do it in Excel, you will need to colour the box in orange, otherwise place a marker in the column corresponding to your score). Then place the numerical score in the 'Total' box for each question. The grand total out of 200 will be calculated automatically. Do not forget to fill in the comments and justification box: e.g. among the users there are few new users. This is **very important** as your comments will be used to inform the Selection Committee and as the basis for the required feedback to the applicants.

Guideline

Guide to the questions

Below you will find a short explanation of what we are looking for. Answer the questions to the best of your ability, with comments and with reference to specific elements in the proposal. If you feel that you do not have the expertise or experience to answer a question, please mark this in your assessment form. Please remember, however, that if you do not score a proposal on a specific question, you may be putting this proposal at an unfair disadvantage. It is therefore crucial that you make this situation clear at the Selection Committee. Please remember also that, even if, for example, you know the subject area and/or feel that the application does not do the applicant merit, you are nevertheless required to assess **ONLY** what is written in the proposal.

Question 1 You should examine the applicants' understanding of **valorisation** as set out in their proposal. It is quite a new concept in the LdV programme and we need to find methodologies to implement it on the ground. This call is one of our instruments for doing this.

Valorisation goes well beyond dissemination. It requires a systematic approach to the exploitation and transformation of existing, usually innovative, products for use in new contexts and to meet new users' requirements. To evaluate the applicants' understanding of valorisation, you can check if the proposal contains the following stages needed in a valorisation process:

- a focus on end user/target group needs from project inception;
- dissemination of innovative training products and results;
- selection and analysis of their suitability for transfer to meet identified new needs;
- translation and adaptation to targeted new contexts;
- piloting and experimentation;
- leading to full integration into the new context.

Question 2 The conferences may not immediately lead to a final result so it is very important that the proposal contains indications of how the follow up of the events will be organised, with what activities and what support etc. The involvement of 'demultiplying' agents within the delivery structure is important here e.g. are any local, sectoral, regional networks or associations etc involved in the project plans? What is the nature of their involvement? How specific, how convincing? Will they play a significant role in project follow-up?

Question 3 To evaluate the focus and potential impact of the conferences, you should look at the numbers and profile of the invited individuals from the projects and also the potential new users (see also Q 5). What proportion of the participants are either project promoters or potential new users? How have they been/will they be identified (open advertising, association members, anyone the organiser knows....)

Question 4 Whilst local level exchanges are important, we will achieve better results from our Call if the event targets decision-makers at the wider local, regional, sectoral or national level. It is important therefore that the event foresees the involvement of appropriate key decision-makers who could reinforce the potential for a more sustainable valorisation of project results with public or private sector training systems. So, how many representatives of different areas of vocational training will be invited, how many decision makers at all levels including from other countries?

Guideline

Questions 5 The purpose of organising events and conferences is not the presentation of some final products. It is more about creating a vehicle for constructive and focused exchanges between an appropriate mix of existing products and targeted new users. You should consider therefore whether the approaches and methodologies for identifying a particular combination of products and users is robust and convincing, and if the products are likely to meet the requirements of the targeted new users. Where the proposal has already identified the products and users, does this seem well-founded? Are there enough products and users? Is the scale of the event worth bothering about? Is the proposal excessively project/product focused? Are the potential new users involved right from the start?

And what about the products being presented for valorisation? Is there any information about whether the products are still in use and by how many different groups of users? Do you think the promoters have come up with something new and original? The conferences/seminars should hopefully lead to transfer of new innovative products. According to the LdV evaluation handbook an innovative proposal is one which convincingly demonstrates that, if financed, its results can bring an **original and significant contribution to European and national vocational training systems and practices**; in other words, is the proposal likely to create something new with respect to existing practices, methods, products, etc. and that, by doing so, can significantly contribute to improving the quality of vocational training?

Question 6 What is the scale and range of the European dimension of the event, measured in terms of contribution to the event's content and objectives, number of participants (promoters and users) from different countries participating in the LdV programme, and potential expected impact in these different countries? How well focused is the European involvement? Is it in line with the needs analysis? What added-value do the different countries bring to the event? How active is the involvement of countries from the new member states and candidate countries in the planning and participation of the event?

Question 7 Priority points may be given to proposals with one or more of the following additional characteristics:

- The proposal may have a link to one of the following LdV Thematic Monitoring themes: 1) Integration into the Labour Market, 2) Development of competencies and skills within companies (SME's), 3) Adaptation of the training supply and new training methods – quality of training, 4) Transparency, assessment and validation of knowledge and 5) E-learning.
- The proposal may be organised on a sectoral basis.

These are optional requirements, but they may come into play in deciding between projects all other things being equal.

Questions 8,9 and 10 30% of the marks are to be allocated according to the organisational and budgetary aspects of the proposals. You will therefore need to look at the work programme and financial plan annexed to the Grant Request form to assess the coherence of the proposals, to take a view on the budget and to check for any obvious anomalies.

Guideline

Some further clarifications:

We are looking for events which bring together a 'critical mass' of projects and users for optimum results. A proposal built around dissemination of one or two LdV products is not suitable.

A trans-national/European dimension is important, but this will be achieved through the participants at the event rather than through the organisational structure. We are not looking for the standard LdV-style multiple partnership. Individual organisations can apply by themselves. A well-argued and justified proposal which focuses on areas of geographic proximity is also acceptable.

Funding is available for the preparatory and follow-up work around the event (eg identification and analysis of needs/users/projects/products; follow-up activities); for activities which will enhance the impact of the event eg complementary project exhibition; and for event follow-up.

Thank you for your participation

Janette Sinclair
12 July 2004

Grid for Evaluation of the content for the call of proposals DG EAC/88/03

Reader :

Proposal N°arrivée B3 :

N° Adonis Arrivée :

| CRITERIA | RATING | | | | | | | | | | | | | | | | | | | | Σ aut | JUSTIFICATION |
|--|--------|---|---|---|---|------|---|---|---|----|------|----|----|----|----|-----------|----|----|----|----|-------|---------------|
| | BAD | | | | | WEAK | | | | | GOOD | | | | | EXCELLENT | | | | | | |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | | |
| 1) The applicants' understanding of valorisation? | | | | | | | | | | | | | | | | | | | | | | |
| 2) The nature of the valorisation activities and events? Do they go beyond dissemination? | | | | | | | | | | | | | | | | | | | | | | |
| 3) The relevance of the results of the event and the impact foreseen relative to the objectives described in the call? | | | | | | | | | | | | | | | | | | | | | | |
| 4) The identification of the new users and their targeted needs? The methodology and the analysis? | | | | | | | | | | | | | | | | | | | | | | |
| 5) The selection and the match of the chosen LdV products to meet these needs? The methodology and the analysis? | | | | | | | | | | | | | | | | | | | | | | |
| 6) The results and the impact of the chosen LdV products. The dissemination and the distribution of the products to a range of users | | | | | | | | | | | | | | | | | | | | | | |
| 7) The innovation level of the chosen LdV products? | | | | | | | | | | | | | | | | | | | | | | |
| 8) The number of new users to be invited to the event? | | | | | | | | | | | | | | | | | | | | | | |
| 9) The profile of the other participants e.g. the representation of a range of different key players in the area of vocational training? | | | | | | | | | | | | | | | | | | | | | | |
| 10) The European dimension of the event (number of countries represented and the impact in the countries?) | | | | | | | | | | | | | | | | | | | | | | |
| 11) The active involvement of participants from the candidate countries? | | | | | | | | | | | | | | | | | | | | | | |

Grid for Evaluation of the content for the call of proposals DG EAC/88/03

| CRITERIA | RATING | | | | | | | | | | | | | | | | | | | | JUSTIFICATION |
|---|--------|---|---|---|---|------|---|---|---|----|------|----|----|----|----|-----------|----|----|----|----|---------------|
| | BAD | | | | | WEAK | | | | | GOOD | | | | | EXCELLENT | | | | | |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | |
| 12) The follow-up activities - sustainable? coherent? | | | | | | | | | | | | | | | | | | | | | |
| 13) Link to Thematic Monitoring or sectoral approach? | | | | | | | | | | | | | | | | | | | | | |
| 14) The capacity of the organisational structure to organise the event and to disseminate and valorise? | | | | | | | | | | | | | | | | | | | | | |
| 15) The quality and the structure of the work plan and the calendar? | | | | | | | | | | | | | | | | | | | | | |
| 16) Is the budget realistic and coherent with the work programme? | | | | | | | | | | | | | | | | | | | | | |
| 17) The monitoring and evaluation methodologies? | | | | | | | | | | | | | | | | | | | | | |

TOTAL POINTS :

0

Signature

Reader :

Proposal N°arrivée B3 :

N° Adonis Arrivée :

| CRITERIA | RATING | | | | | | | | | | | | | | | | | | | | TOTAL | JUSTIFICATION |
|--|--------|---|---|---|---|------|---|---|---|----|------|----|----|----|----|-----------|----|----|----|----|-------|---------------|
| | BAD | | | | | WEAK | | | | | GOOD | | | | | EXCELLENT | | | | | | |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | | |
| 1) Relevance of the content and anticipated results of the event (Exhibition/Conference) to the objectives of the Call ie the contribution to the dissemination and exploitation (valorisation) of innovative results of Leonardo da Vinci projects, including potential for identifying and meeting identified training needs | | | | | | | | | | | | | | | | | | | | | | |
| 2) Quality of the proposed delivery structure, and in particular its capacity to disseminate, valorise and ensure effective follow-up | | | | | | | | | | | | | | | | | | | | | | |
| 3) Number, profile and quality of participants at the event - range of existing and potential users/target groups, project promoters and partners, evidence of effective targeting. | | | | | | | | | | | | | | | | | | | | | | |
| 4) Number, profile and quality of participants at the event - decision makers at all levels, key players in the field of vocational training; scope for sustainability | | | | | | | | | | | | | | | | | | | | | | |
| 5) Quality and effectiveness of methodology, tools and practical approaches proposed for analysis and matching of products and user needs; and scope for standardisation | | | | | | | | | | | | | | | | | | | | | | |
| 6) European dimension of the event, in terms of contribution to the event's content and objectives, number of participants from different countries participating in the LdV programme, and potential expected impact in these different countries. Active Involvement of new member states and candidate countries. | | | | | | | | | | | | | | | | | | | | | | |
| 7) Contribution to Call priorities : Sectoral or thematic focus | | | | | | | | | | | | | | | | | | | | | | |
| 8) Work plan and project calendar - clarity and appropriateness with regard to the objectives and means proposed | | | | | | | | | | | | | | | | | | | | | | |
| 9) Financial plan - quality,clarity, coherence with work plan. | | | | | | | | | | | | | | | | | | | | | | |
| 10) Monitoring and evaluation methodology, overall coherence and good order of application. | | | | | | | | | | | | | | | | | | | | | | |
| TOTAL POINTS (Proposal N° arrivée B3 :): | | | | | | | | | | | | | | | | | | | | | 0 | |

Evaluator' s Name :

Signature :



Survey of dissemination and exploitation (valorisation) activities in the EU Programme “Leonardo da Vinci”

1. General information:

Please give some details about you and the organisation/enterprise you represent. This information will be treated in confidence¹.

Organisation: _____

Nationality: _____

E-mail address: _____

2. In which capacity did you participate in the conference mentioned in the header? (Only one answer please)

- Representative of project/projects that were presented at the conference or partner in the presented project = **Project promoter**
- Representative of an organisation that could be interested in “using” the original product presented at the conference or adapting it to its purposes (direct/immediate use) = **User/potential new user**
- Representative of an organisation/ person (e.g. decision maker, social partner, representative or a public body, a national agency or an intermediate organisation) who could help to support further exploitation of the projects presented at the conference (indirect use) = **Intermediary**

3. Question for all participants:

What was your overall impression of the conference as regards its objective to provide a platform for the exchange between project outcomes and potential new users? (please tick one or more responses)

- the conference provided a good exchange forum for project results and potential new users
- I was satisfied with the outcomes of the conferences
- I think such conferences are a good means to enhance future exploitation

¹ Personal data will be protected in accordance with European Regulation (CE) n° 45/2001, with any claim in this matter falling under the competence of the European Data Protection Supervisor (www.edps.eu.int)

- for me the conference was not useful
 - I have the following comments or recommendations
-

4. Question for all participants:

Did the conference have any effects afterwards?

- yes (please specify under question 5)
- no

If the conference had no impact please provide further information on the reasons why not?

5. Question for all participants that gave a positive answer under question 4.

The valorisation conference had one or more of the following effects:
(please tick one or more responses)

- I used it for networking
 - I understood the importance and necessity of valorisation (e.g. including a valorisation plan, incorporating users right from the beginning of a project)
 - I picked up ideas for developing my area of work
 - I noticed the following effects (please specify)
-

6. Question for project promoters whose project/projects was/were presented at the conference: Did the conference help you to further exploit your project outcomes?

- yes (please specify under question 7)
- no

If the event did not help you to further exploit your project, could you please provide further information on the reasons why not?

7. Question for project promoters who answered “yes” under question 6 - The project outcomes were exploited as follows: (please tick one or more responses)

- disseminated to other fields of activity, which ones? _____
- transferred to a new country/new countries

- adapted to new target groups
- transferred to new sectors, which ones? _____
- tested by other organisations
- adopted by training institutes
- adopted by enterprises or other bodies
- commercialised
- accredited/certified
- introduced in training modules/curricula/educational systems at
 - local level
 - regional level
 - national level
 - European level

Could you please provide further details e.g. numbers for the questions you ticked?
Please give as realistic and accurate an estimate as you can.

8. Question for potential new users: Did the products/results presented at the conference benefit you/your organisation?

- yes (please specify how under question 9)
- no

If you/your organisation did not benefit from the results presented could you please provide further information on the reasons why not?

9. Question for potential new users who answered “yes” under question 8:

The project results (products) presented at the conference were useful for me/my organisation:

- I discovered a product or parts of products that are interesting for my organisation
- I tested a product or parts of products in order to use it in my organisation
- I adapted a product to my training needs and I actually used/use it

- I transferred a product/result to my organisation for further use
 - I would like to add the following points:
-
-

10. Question for intermediaries:

Have you taken any action to support further exploitation of products that were presented?

- yes (please specify your action under question 11)
- no

If you took no action to support further exploitation could you please explain why not?

11. For intermediaries that answered “yes” under question 10: I supported exploitation as follows:

- I forwarded information about project outcomes that could be interesting for my organisation or the organisations/network I represent
- I recommended the product to suitable organisations/enterprises
- I recommended a product as training module/curriculum at:
 - local level
 - regional level
 - national level
 - European level

Could you please provide further details e.g. how you proceeded to support further exploitation

- Thank you for your help -

Survey of dissemination and exploitation (valorisation) activities in the EU Programme “Leonardo da Vinci”

Unit C3: Dissemination and exploitation of results - Directorate General for Education and Culture, Directorate Vocational Training

May 2005

Dear Sir or Madam,

In 2004, the European Commission funded a number of valorisation conferences to promote further dissemination and exploitation of project results of the Community Vocational Training Action Programme “Leonardo da Vinci”. Exploitation activities are necessary to ensure visibility of project outcomes, to optimise their value, enhance their impact and integrate good practice into training systems and practices at local, regional, national and European level.

The purpose of these conferences was therefore to bring products and project outcomes together with potential new users and provide an exchange forum for matching supply and demand.

You participated in one of these events and therefore **your views are important to help us measure the impact of these actions**. In order to learn more about the follow-up and positive effects of the conferences, we have prepared a short questionnaire about your experiences with the exploitation of project results.

You have probably already been asked to give feed-back at the conference or immediately afterwards; nevertheless we would very much appreciate it if you could **answer this questionnaire** as well, since we are looking at **the impact** and effects of the conference **after a time period of five to nine months after the conference**.

The results of this survey will help us to formulate future exploitation activities within current and future European lifelong learning programmes and other programmes and initiatives of Directorate-General for Education and Culture.

I would be very grateful therefore if you could take a few minutes to answer the attached questionnaire. Questions 1- 5 are relevant for all participants (pages 1-2), questions 6- 7 for project promoters (page 3), questions 8-9 for new users or potential new users (page 4) and questions 10 -11 for intermediaries (page 5).

The easiest way to return the questionnaire is by using the “Reply with Changes” mode in “Outlook”. You can also return the questionnaire either

- by EMAIL to: [EAC LEONARDO VALORISATION INQUIRY@cec.eu.int](mailto:EAC_LEONARDO_VALORISATION_INQUIRY@cec.eu.int) or
- by FAX to: [00322/295.57.23](tel:003222955723)

I would be grateful if you could complete the questionnaire by 8 June 2005.

Thank you in advance for your help.



Education and Culture

**Assessment of Calls EAC/88/03
and EAC/23/04 relating to the
organisation of events for the
exploitation of innovative results from
the Leonardo da Vinci programme**

EXECUTIVE SUMMARY

INTRODUCTION

In the Spring of 2006, a study was initiated by Unit C3 (Dissemination and Exploitation of Results) of the Directorate-General for Education and Culture (DGEAC) to analyse the results of two Calls for Proposals (Calls) for events for the dissemination and exploitation of results launched in the framework of the Directorate-General's Strategy for Dissemination and Exploitation of Results with particular regard to projects funded under the Leonardo da Vinci Programme.

The aim of the study was to consider whether the 19 projects funded as a result of the two Calls managed to stimulate an increase in the use of Leonardo da Vinci products and results and whether new approaches to and levels of participation and networking were activated amongst different VET actors, and if so, whether these results can be considered as representing good value against the financial and human investment made.

The objectives of the study were to identify good practices and individual case studies illustrating the potential of events bringing together project results and potential new users to enhance the Directorate-General's Dissemination and Exploitation Strategy and to provide recommendations towards successful dissemination and exploitation projects under the new Lifelong Learning Programme (LLL).

The study was undertaken by three vocational training experts from Belgium (Alfons Mertens), Italy (Michela Vecchia) and the UK (Paul Guest) in conjunction with colleagues from Unit C3 (Dissemination and Exploitation of Results) of the Directorate-General for Education and Culture.

METHODOLOGY

The projects were required to identify project results judged to offer responses to identified new user needs; organise one or more brokerage events to bring the results and the new users together; and actively promote and develop the resulting contacts during a follow-up phase.

Two parallel analyses were undertaken. A quantitative analysis, in order to better understand the context of projects (identified needs, targeted beneficiaries, type of events, stakeholder involvement, involvement in key activities), and a qualitative analysis, presenting findings and highlighting the perspectives of both Contractors and participants.

The analyses relied upon existing project data (applications, monitoring reports, interim and final reports, project assessments) but also considered comments and suggestions provided by individual Contractors, the results of surveys conducted by individual Contractors with event beneficiaries and the results of an internal interim assessment of the first 10 events undertaken by the Directorate-General.

As a part of these analyses, four key questions were addressed:

- WHO was involved in terms of promoters (Contractors) and other actors

- WHAT were the identified needs and HOW were projects able to meet these needs
- WHO was involved in brokerage, dissemination and networking activities
- WHAT follow-up activities took place in order to assure sustainability

Effort was made to measure the coherence of the results of the two Calls in relation to overall policy aims, leading to the identification of programme and project successes, lessons to be learned and recommendations and suggestions for future dissemination and exploitation activities.

The two analyses led to both quantitative and qualitative findings and results, examples of which are provided below:

Quantitative

- 58% of Contractors were from the original 15 EU Member States, and 26% from the new EU-10 Member States, confirming a trend for the Leonardo da Vinci programme for new EU Member States not only to participate but increasingly to act as leaders in European VET projects
- proactive brokerage activities, expected to ensure maximum impact of the events, only featured within 47% of projects
- of the 30 events held, half of these took place in new EU Member States
- events focused more upon the quality than the quantity of products with 77% of projects showcasing 10 products or less
- the total number of participants across the 30 events was 3263

Qualitative

- of the events held, three major categories are evident, namely, large scale conferences; thematic and/or sectoral conferences; and restricted or focused events
- events in each category tended to comprise three elements, a general conference based on the intervention of invited speakers and project promoters; parallel workshop sessions; and a project exhibition
- the identification of participants (potential new users, projects) relied upon a range of different approaches such as selection according to the theme of the event, consultation with national experts and stakeholders or the qualitative analysis of products and results ascertaining their suitability for transfer to new target groups
- the level of follow-up activities varied amongst projects with some adopting a range of tools and approaches (evaluation questionnaire, maintenance of project website, distribution of conference proceedings) and others not undertaking any follow-up activities whatsoever, the latter citing a lack of budget and/or time
- the concept of brokerage was not fully clear to all Contractors - some took the view that the event itself was the brokerage opportunity, and therefore no additional reinforcing actions were developed.

RESULTS - Key Successes, Added-Value and Lessons Learned

Success: The 19 funded projects demonstrated the active involvement of candidate countries¹, as required by the two Calls with 26% of projects led by organisations from these countries.

Success: Considering the European Dimension, two-thirds of Contractors chose to involve organisations from up to 8 other European countries, beyond the requirements of the two Calls, with 26 out of the 30 eligible² countries participating.

Added-Value: A priority of both Calls was the number, profile and quality of participants at valorisation events, for which there were 3263 participants involved in 30 events across 16 countries. Participants included a wide range of potential users and new target groups, past and present project promoters and decision-makers in the field of vocational education and training. Roughly translated this means that for each project showcased there were potentially 4 new users present.

Added-Value: New and sustainable levels of participation are particularly visible where project results have been embedded into existing practice (e.g. the incorporation of the European Quality in Mobility Award into the work programmes of Leonardo da Vinci National Agencies) or where previously-funded valorisation events are now planned to be repeated on a regular basis (e.g. International Forestry Training Centres Conference).

Lesson Learned: Following its own interim assessment of the two Calls, the Directorate-General recognised a need to ensure the follow-up of events took place, subsequently the third Call for 'exploitation' events in relation to Leonardo da Vinci (EAC/92/04) and the first Call for 'exploitation' events in relation to Socrates (EAC/12/06) both required potential promoters to dedicate time and funds to such activities, organised as a distinct part of the project. This represents a lesson learned by the Commission during its own implementation of the two Calls.

Lesson Learned: The post-event evaluation of event participants was in some cases undertaken both by the individual Contractor and by the European Commission, with the potential for overkill or overlap, suggesting that future Commission-led evaluation activities ought to have more synergy with local event evaluation.

Key Recommendations for Future Dissemination and Exploitation Calls or Initiatives

Recommendation: Information held by the European Commission and the network of National Agencies (all programmes) in relation to successful products and results should be more quickly and more readily accessible to potential promoters thus supporting an enhanced and improved selection of products, processes and results for further dissemination and exploitation.

¹ a definition which now includes new EU Member States and accession countries

² excludes Turkey

Recommendation: Whilst initial improvements have already been made to Call documentation by DGEAC³, all future Calls for Proposals should feature a separate Glossary of Terms ('valorisation', follow-up activities, end users, target groups, etc.) in addition to the definitions provided in the Call to ensure that all potential promoters fully and equally comprehend the aims and objectives of the Call⁴.

Recommendation: Future promoters should be required clearly to outline the dimensions of their planned event. This would require the Grant Request Form (currently section 3) to be updated to include a request for information on the type of event being held (e.g. large scale conference, thematic or sectoral event) and the type of sub-activities planned e.g. exhibition of products, workshops, interactive sessions between promoters and users, thus supporting improved understanding of the planned event(s) during the assessment and selection phase.

Recommendation: Within future Calls for Proposals it should be made clear to potential promoters that when selecting projects to participate in a 'valorisation' event, such projects must have already reached the stage of their project where a prototype of the product or process proposed for dissemination and exploitation is already available.

Recommendation: Building upon the successes of the two 'experimental' Calls, the Directorate-General (Unit C3) should circulate / publish extracts from the Events assessment report (including Case Studies) to raise awareness of / create higher levels of visibility in relation to previously-funded 'exploitaiton' events.

Recommendation: DGEAC to consider criteria for measuring whether the introduction of minimum requirements for follow-up activities was successful in increasing the amount, range and impact of follow-up activities actually undertaken by projects.

Recommendation: Future Commission-led survey activities should have greater synergy with individual project follow-up strategies and should remove the requirement for contact details of the individual from the survey questionnaire to allow genuine anonymity.

Recommendation: The requirement currently in place for Leonardo da Vinci projects to showcase their work via a website⁵ should be extended to all valorisation events projects and should be a key criteria within any future Calls for Proposals.

³ an example is the replacement of the term 'brokerage' with 'interactive exchanges between project promoters and users [...] with the aim of facilitating the transfer and exploitation of project results to meet the needs of new users'

⁴ a common terminology was recently adopted in English, French and German with translation into all official languages also being considered - available at: http://ec.europa.eu/dgs/education_culture/valorisation/doc/glossary_en.pdf

⁵ since 2002, Leonardo da Vinci contractors have been required to showcase their work to the public via a project website (c.f. section 4 of the Leonardo da Vinci Guide for Promoters)

Recommendation: Future Calls for Proposals should inform potential promoters of the importance of hosting focused events, with clear information to (potential) participants, in advance, of the aim, objectives, content and theme of the planned event. In particular, this should make clear that 'valorisation' events are not contact seminars but aim to encourage potential new users to network with those having previously developed Leonardo da Vinci products and results to thus encourage wider dissemination and exploitation of those results.

Recommendation: Final Report documentation for valorisation events projects to be updated requiring Contractors to provide more detailed information on [a] the evaluation strategy, evaluation response rates and the use of the results of event evaluation and [b] short-term impact measurement (what was measured? how was this undertaken? what were the results?) and approaches to long term-impact measurement.

Recommendation: Future Calls for Proposals should include an outline of expected products/outputs/results with a required minimum for projects to publish event findings/proceedings, where possible, in electronic format (pdf). This, in addition to the requirement for a project website will provide the Directorate-General with real examples of products and results resulting from valorisation events, for use in awareness-raising and in publicising past valorisation activity.

Recommendation: DGEAC to better inform and support Contractors in their follow-up activities, encouraging more active follow-up of event networking (between potential new users and promoters) and the establishment of post-project mechanisms for communication (networks, discussion fora).

Recommendation: DGEAC (Unit C3) to consider potential mechanisms for meta-level impact assessment for all programmes e.g. post-contract review meetings with Contractors, focus groups and active reviews of / participation in discussion fora

CASE STUDIES

The study is supported by two Case Studies presenting examples of good or interesting practice encountered during the assessment of the two Calls. Further examples (vignettes) feature within the main text of the study.

CONCLUSION

The two 'experimental' Calls can be deemed a success, considering the extent of participation (19 projects hosting 30 events across 16 countries; projects involving 3263 participants from 26 countries), the active involvement of candidate countries and the potential for sustainability of the results (embedded activities and repeat events). Development was ongoing even during the lifetime of the 19 funded projects, with terminology being clarified, glossaries being introduced and programme documentation being updated. This development activity now needs to continue in line with the recommendations of this assessment report (enhanced involvement of National Agency data and expertise; clearer definitions of expected outputs

and results; more active support to projects to enhance the range and level of follow-up activities). Finally, the Directorate-General needs to consider how it will measure the longer-term impact and successes of such projects on a larger, pan-project, pan-programme scale.