
Transnational Partnership Guidance Note for Leonardo da Vinci Projects

Leonardo UK National Agency

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INTRODUCTION

What is the Leonardo da Vinci Programme?

The Leonardo da Vinci programme is the European Community's vocational training action programme. The programme encourages collaboration, at European level, between vocational training organisations, aiming to enhance the quality of training provision, develop the skills and mobility of the workforce, stimulate innovation and enhance the competitiveness of European industry.

The Leonardo da Vinci programme finances five distinct main "measures", which are explained in section 1.3; one of the basic requirements for all projects is the establishment of transnational collaborative partnerships between organisations working within the field of vocational education and training in the different participating countries. The programme currently encompasses 31 countries.¹

The main result, and indeed the cornerstone, of a good Leonardo da Vinci project is the development of a successful transnational partnership to improve quality, foster innovation and promote the European dimension in vocational training.

About this Guide

This guide aims to provide practical advice and useful information to those new to transnational work and partnerships as well as for those who are knowledgeable in this area but who are looking to learn from the experiences and practices of other organisations.

The guide focuses on the following:

- The Leonardo da Vinci programme and transnational working
- Setting up a strong transnational project
- Key success factors to working transnationally

The information in this Guidance Note comes from a wide range of sources (see Annex 4). It relies on the wealth of personal experiences of individuals involved in Leonardo da Vinci projects selected in the 2000, 2001, 2002 and 2003 calls for proposals. The information comes from feedback reports from monitoring activities (e.g. regular telephone calls and project visits *in situ*), assessment of applications, Interim and Final reports, and promoters' presentations at events.

1.0 THE LEONARDO DA VINCI PROGRAMME AND TRANSNATIONAL WORKING

The enlargement of the European Union adds a new dimension and a number of challenges, opportunities and requirements to work in the field of education and training.² The good news is that there are many different programmes and initiatives to support transnational activities funded both nationally and by the European Commission. The type of work you and your partners would like to undertake will, in part, determine what type of funding you can apply for.

1.1 Key Features of the Leonardo da Vinci Programme

It is worthwhile mentioning a few of the key features of the Leonardo da Vinci programme:

- It is the European Union Action programme funded by the Directorate-General for Education and Culture which provides support to transnational projects in the field of education, vocational training (see Annex 1).
- The programme encourages multiplayer co-operation by promoting new forms of partnerships at a European level; it aims to involve a wide range of organisations working within vocational education and training, which do not usually work together but which need to pool expertise to develop innovative training.
- The programme spans over 31 countries and in so doing covers a wide geographical area, thereby giving real meaning to the concept of exchanging and gaining from experiences and expertise between different practices in the field of vocational education and training.
- The application process for the programme is quite straightforward. As the lead promoter, you (and your partners) make one joint application; there is no need, as with other programmes, e.g. the EQUAL programme, for your partners to apply separately for funds in their own countries.
- Finally, the programme encourages strong partnerships as it requires the contractor to establish partnership agreements. These legal documents, signed by both parties, enable partners to work within a defined framework, whilst providing a strong legal and formal support to the partnership itself.

1.2 Why Does the Leonardo da Vinci Programme Fund Transnational Activities?

The main reason is for the European Commission to promote the exchange of expertise in vocational training at a European level. Subsequently, the aim of improving vocational training systems and practices through the institutions involved in vocational training within (or beyond) the participating countries of the programme can be achieved.

Another key aspect of the programme is the idea that transnational working is fundamental to innovation and provides numerous opportunities to organisations, either as contractors, partners or subcontractors, both during and after the project duration.

The benefits to organisations and individuals of transnational working are well documented, for example see “The EQUAL Guide on Transnationality” published by the European Commission.³

² See *The Copenhagen Declaration (Copenhagen 29-30 Nov 2002)* for further information. The full text is available from: www.europa.eu.int/comm/education/copenhagen/index_en.html

³ A full copy can be accessed online at: http://europa.eu.int/comm/employment_social/equal/data/document/transnatguide_en.pdf

1.3 Activities Funded by the Leonardo da Vinci Programme

The Leonardo da Vinci programme funds various types of measures. What all these projects share is the establishment of an effective transnational partnership and the development of innovative, quality training materials or products as their key priority.

The different types of measures are as follows:

Mobility projects (MP) support work placements for beneficiaries and exchanges of trainers. They provide the opportunity for participants to spend periods of time in another European country and gain first-hand experience of different working practices, cultures and training systems. Placements and exchanges under this measure can last from 3 weeks to 12 months depending on the target group involved and projects can last up to 2 years from preparation to reporting. Transnational partnerships must involve partners from at least two participating countries, one of which must be from a Member State of the European Union.

Pilot projects (PP) develop innovative training materials and address themes of particular European Community interest in the field of vocational training. Pilot projects must develop tangible products, using new information and communications technologies where appropriate. They should aim to design, test and validate new approaches to vocational training and projects can last from one to three years. Partners from at least three participating countries must be involved in the transnational partnership, one of which must be from a Member State of the European Union. There are no restrictions on the maximum number of partners involved, but the contractor must ensure that the partnership is manageable. All partners are required to provide letters of intent to demonstrate their commitment to the project.

Language Competence (LA) projects are designed to enhance multilingual and multicultural communication in training/ work environments. Such projects must develop methods, approaches and tools directly related to work situations and can produce vocationally specific language competence materials. Projects can last from one to three years. Transnational partnerships must involve partners from at least two participating countries, one of which must be from a Member State of the European Union.

Transnational Network (NT) projects aim to amalgamate and develop European expertise and innovatory approaches, as well as improve the analysis and anticipation of skill requirements. Projects should develop transnational networks to facilitate the transfer and exchange of experience and good practice. These projects, by nature, should involve multiplayer partnerships including a wide range of organisations. Partners from at least three participating countries must be involved in the transnational partnership, one of which must be from a Member State of the European Union.

Reference Material (RM) projects are designed to contribute to the growth of knowledge, at Community level, on systems of vocational training in participating countries. Projects involve the comparison of data, surveys and analyses, and the observation and dissemination of good practice. Projects can last from one to three years. Transnational partnerships must involve partners from at least three participating countries, one of which must be from a Member State of the European Union.

There is also a special provision for “**joint actions**” linking together the Leonardo da Vinci, Socrates, Youth and Culture 2000 programmes:

Joint Actions (JA) projects support initiatives which extend beyond the scope of a single programme and do not belong exclusively in education, training or youth. Joint actions also aim to encourage the development of innovative approaches to analysing and solving problems which cut across several areas, through co-operation between different sectors at different levels, transnational networking and removing barriers between different modes of intervention. Projects can last up to two years. Partners from at least four participating countries must be involved in the transnational partnership.

For full details on each of these measures and how to apply, contact the agencies responsible for providing support and guidance. These are detailed in Annex 1.

This guide focuses on Pilot projects, Language Competence projects and Transnational Network projects.

2.0 SETTING UP A STRONG TRANSNATIONAL PROJECT

Before you embark on applying for the Leonardo da Vinci programme, there are two key issues to consider:

- Like many other European Commission programmes, bidding for Leonardo da Vinci is highly competitive; only the best projects will be funded
- To set up and manage a transnational partnership takes a lot of time, dedication and resources

This guide should help you decide if your project idea is robust enough and to help you consider if you have the right resources, or if you can obtain them - see the table in Annex 3. The checklist is not exhaustive but might help you decide if your organisation should get actively involved in transnational work or not.

If you have the resources in place, or can secure them, make sure that you have given yourself a realistic timetable to find appropriate partners and develop the project. It is easy to underestimate the time it takes to put together a strong and appropriate transnational team with the required skills and expertise.

Your bid will go through a rigorous appraisal system and the Commission guidance notes for each measure set out the criteria against which your proposal will be appraised. However, there are key areas where proposals often flounder and these include providing:

- A clear innovative idea (see section 2.1 below)
- A genuine transnational project (see section 2.2 below)
- A clear justification for the project (see section 2.3 below)
- A robust partnership (see section 2.4 below)
- A coherent workplan (see section 2.5 below)
- A comprehensive dissemination strategy (see section 2.6 below)
- A strong evaluation plan (see section 2.7 below)
- A proactive strategy to address equal opportunities (see section 2.8 below)
- A robust social dialogue (see section 2.9 below)

The rest of this section explores each of these issues and, where possible, provides advice and tips from successful project promoters.

2.1 A Clear Innovative Idea

The specific focus of Leonardo da Vinci projects is “innovation”. This term is rather difficult to define in relation to Leonardo da Vinci projects as it can cover a wide range of activities such as the development of new training materials, methodologies or approaches. A project may also deliver innovation through the composition of the partnership, its working methods or its evaluation and dissemination strategies.

It is crucial that potential projects offer a *new approach* that will lead to a *useful outcome* in the field of Vocational Education and Training (VET). Novel ideas on their own are not enough. Whilst current Leonardo da Vinci projects are working towards new and interesting products in pioneering ways, their success is due to their ability to *demonstrate* the innovative aspects of the project.

This involves not only pinpointing what is unique about the project, but also offering concrete evidence to support such claims. Your justification should place your idea in the context of:

- Current developments and policy at EU level
- Existing training provision in each partner country
- Developments in the relevant sector at European and national level

It is important to explain and stress the innovative aspects of your project ideas!

The case study below shows an example of an innovative project:

UK/00/B/F/PP/129_117 - Supply Chain Management in the Music Industry across the Internet, University of Huddersfield

The **Supply Chain Management in the Music Industry across the Internet** project supports **creative independent organisations and individuals across the music industry supply chain**. The focus is on the development of Internet-based applications through e-learning tools that can be accessed through both fixed and mobile communication devices. Innovation and creativity are the basis for the project and are pivotal to all activities. Examples include the online vocational training applications, a creativity-led web-based application that forms the basis for the diagnostic tool kit, and a repository of learning objects allowing the provision of personalised learning.

At Full Proposal stage, this promoter explicitly identified the various innovative elements of the project, and linked them with policy in the UK (Government Green Papers, National Skills Agenda) and at EU level (EU Research and Technological Development policy, Action Plan on Innovation).

2.2 A Genuine Transnational Project

Start as you mean to go on. Bidding for funds is time consuming and can be quite complex. Often there is the temptation for the lead partner to write the proposal submission and then find suitable transnational partners afterwards. Try to avoid this approach! Engaging partners at the early stages will help you understand the particular situation in their country or region and ensure that a genuine European approach is developed rather than one that might suit one particular partner. This will help justify and strengthen the proposal and will help to gain partners' commitment so they will be less likely to pull out. This inclusive approach builds a good partnership foundation from which to deliver the project outputs and ensures that the project is applicable to all countries involved.

Another tip is to ensure that you are not taking a good idea from one country and applying it to others with minimal adaptation and development. The Leonardo UK National Agency, for example, regularly receives projects which are seeking funding to "export" ideas from Western to Central and Eastern Europe.

Below are a few recommendations on the preparation and drafting of proposals from two successful Leonardo da Vinci project promoters:

UK/01/B/F/PP/129_355 - WEB-Based Information Technology Training, Trades Union Congress

UK/01/B/F/PP/129_377 - Assisting Sole Traders to Undertake Tailored Employment, Omagh Enterprise Company Ltd

Preparing the proposal – developing the idea

- Get the idea - it must meet real need
- Develop the idea - there must be a good match between need and the EU programme
- Develop the rationale - the transnational element must add value
- Establish clear aims/objectives/structure - be clear about how the project can be delivered
- Define clear outcomes, budgets and timescales - be realistic about how much time such projects really take
- Identify clear roles and involvement of partners
- Emphasise the importance of continuous dissemination, monitoring and evaluation

Writing bids

- Clearly state the relationship between project objectives and those of the Leonardo da Vinci programme
- Think “how I am going to achieve what I have said I will do”
- Be realistic about times and costs
- Get any help you can
- Think about how you are going to co-ordinate your bid writing with building partnerships

Lessons learnt

- Develop a very clear idea
- Develop a structured, relevant and high-quality content
- Get the right partners
- Involve all partners
- Set up support structure for the target group
- Make the project content “user friendly”
- Be very clear about the budgets
- Set realistic timescales and stick to them

Choosing your partners - take time to check out the following carefully:

- Partner skills and abilities
- Partner capabilities and capacity
- Partner commitment, motivation and involvement
- Partner resources and finances
- Partner stability and track record
- Designated contact people in the partner organisations
- Explain your role as the lead partner and project management roles
- Try and use partners you have used before or who have been recommended

2.3 A Clear Justification for the Project

Your project idea has to be a good one, underpinned by evidence. The project should be well justified, which means that clear reasons must be given to explain why the project is needed.

Prove that your project is necessary; stating that the partnership has identified the need will not stand up to scrutiny. To improve your chances of success provide references to key studies, or provide statistics at UK and EU level. Do not be afraid to quote your references. To add weight to this, remember to mention the relevant European reference documents whenever appropriate (e.g. Council Decision 1999/382/EC). These will back up your project proposal by demonstrating its needs within the European political, social and economic context. A reference from a highly recognised authority or organisation in the field of your project will also be most valuable. In cases where this is not possible explain why and demonstrate how you have been able to verify the need, e.g. through workshops and seminars with employers, or surveys, etc.

Your project should meet specific needs, or alternatively address the failure of current approaches to meet those needs in all the selected participating countries or at European level. You need to be clear that your project is not already being funded nationally or by a European programme. If there are other initiatives in your area of work, highlight these and explain how your Leonardo da Vinci project complements or adds value to existing work.

The Community added value should also be highlighted; obviously, the wider the potential impact of the project, the better. Remember that the European Union is the financing body behind your project. Stating the European context and justifying the needs, which your project will meet at a European level, could in fact be one of the first sources of evidence to support your project proposal.

2.4 A Robust Partnership

A successful transnational project will be driven by a robust partnership. You need to consider very carefully if you have the right team to deliver your project. If not, think about bidding in a future round rather than struggle with the “wrong” team. The checklist in Annex 5 provides some of the key questions to ask to help you get to know your partners and assess if they are right for the project. You need to be prepared to provide this information about your organisation in exchange.

The “right” mix of partners will vary depending on the measure you are targeting, e.g. for a transnational network your partnership is likely to include a larger team with a lot of dissemination expertise. However, below are a few tips which apply to all measures. They might sound obvious but it is surprising how often the Leonardo UK National Agency receive proposals where these issues have not been fully addressed.

Provide a good mix of expertise. Look at partnership building as a “puzzle”, whereby the combination of each partner’s specific expertise is necessary to develop innovative ideas and products. You should therefore devote time and attention to finding the appropriate partner for the project, whose expertise is necessary or complementary to others for achieving your project. Building a multiplayer partnership means that, in addition to vocational training providers and universities, you should also consider other relevant stakeholders for the project, e.g. accreditation bodies, social partners, local authorities, SMEs, charities, ICT experts, etc.

Ensure that you present a genuine transnational and inclusive partnership: all partners should have an identifiable role and the budget should reflect this. If the bulk of the budget and/or of the

workplan is allocated to a couple of partners from the same country, there will be issues raised about the true transnational nature of the project.

Be attentive to the geographical scope of your project. To do this, we would recommend that you include partners from the north, south, west and east of Europe, where the sharing of expertise and potential impact of the project could be best demonstrated and highly valuable. Also, if the project is limited to a number of similar countries, e.g. Ireland, the UK and the Netherlands you will have to clearly justify how such a project could be relevant to Southern and Eastern European countries.

Explain the true transnational nature of your project: This can be demonstrated in various parts of your project application e.g. in the choice of your partner's countries and also in the responsibilities, activities and budgets allocated to your various partners as well as in your workplan.

It is also important to consider carefully the number of partners you want to work with, bearing in mind that this may be a long-lasting working relationship of up to 36 months. You need to be prepared for potential "drop outs" prior to contracting. Additionally, as the project progresses, there may be genuine reasons why a partner withdraws, or you could find yourself in a situation similar to the one illustrated in the Craft Into Technology – Technology Into Craft (CITTIC) case study overleaf. However, the larger the partnership, the more time, energy and budget is needed to keep it on track.

A partnership with members that have close links to beneficiaries, or that can reach out to other sectors is also recommended. The reason behind this is that the programme aims to develop innovative training which is necessary and which responds to target groups' needs. To demonstrate this, you should describe the mechanisms which will ensure the participation of target groups during the implementation of your project. Examples include sending questionnaires, establishing focus groups or organising interviews with the target groups so as to analyse their training needs at the start of the project. You could also involve the target group in the testing of the training materials or in the creation of your project website and finally involve them in your dissemination activities throughout your project.

Take time to choose your partners. Sometimes it might be easier to work with partners you already know, but think about their exact role and the expertise you need in your partnership. A new project might also be a good opportunity to find new partners. Having a partner who has already been involved in other Leonardo da Vinci projects might also facilitate your tasks as your partner will already be aware of the working processes and procedures of the programme.

To find new partners across Europe, use the Commission's Partners Search database available at <http://leonardo.cec.eu.int/psd>. You can also use the vocational training links available at <http://www.leonardo.org.uk> which aims to facilitate initial contacts between organisations in the UK and countries throughout Europe. You can also consult the Leonardo da Vinci project directories at the www.leonardo.org.uk website address for examples of past and current project partnerships.

The case study below demonstrates some of the challenges faced when working in complex transnational partnerships:

UK/00/B/F/PP/129_106 - Craft Into Technology – Technology Into Craft, Dudley College

June Johnson, Project Manager, learnt a great deal from the problems she encountered with the partnership itself. She not only had to devote much of her time to solving the various problems but was also concerned that these issues might have easily led to major difficulties in the project's outcomes and budget.

In this project, it was discovered that Partner 1 was unable to complete the work they had agreed to carry out. The contact person at Partner 2 kept changing with consequences for the achievements of their aims. Partner 3 was unable to access their funding because of internal difficulties with their accountant and Partner 8 left the project before it started. Following discussions with the Leonardo National Agency, the following solutions were found:

- After detailed discussions with other partners, Partner 1 was asked to leave the project and the contract terminated. The partner's work and budget were re-allocated amongst the remaining partners.
- With Partner 2, continuous efforts were made to establish and maintain contact with each new contact person, as their details became available. June endeavoured to inform each person of the project's aims and their organisation's role, and to keep them up-to-date with the project and the work still to be carried out.
- June wrote formally to Partner 3's accountant and through her perseverance, the funding was eventually released to the partner.
- A replacement partner was found for Partner 8 and approved by the rest of the partnership.

June's recommendations to others are:

- To carefully check out prospective partners
- To have a contingency plan
- To carefully word partnership agreements
- To ensure that partners understand and agree their role

2.5 A Coherent Workplan

Successful projects will need to demonstrate that:

Transnational activities are an integral part of the overall aims of the project and are not just a side activity. As an example, the development of new training modules should be the results of collaborative work of the project participants, giving them the opportunity to develop a common framework whilst taking into consideration each country's specificity.

There is genuine adaptation and/or development and transfer of outcomes within the participating countries. A product which is being developed within the UK and then exported to other countries is not appropriate. The product must result from a close collaboration of the countries involved, by taking into account each country's operating environment and training practices.

The workplan is consistent with the rest of the project application. For example, sometimes projects mention key activities in the project summary, but these are not then mentioned in the rest of the application.

The workplan is well defined. To assist you with this, you can first establish SMART objectives, i.e. Specific, Measurable, Achievable, Realistic and Time-bound objectives will help you to devise a workplan where work packages can be clearly described in terms of their activities, results and deadlines. You also need to think about the coherence and feasibility of your workplan in relation to your project's needs (e.g. are work packages cascading or are they running in parallel?). It is recommended that projects should include distinctive work packages for evaluation and dissemination.

2.6 A Comprehensive Dissemination Strategy

Dissemination is highly promoted by the European Commission and by the Leonardo UK National Agency. In brief, dissemination aims to promote and publicise the project's results and in so doing, increases the visibility, potential impact and sustainability of the project. To do so, we recommend that you define a clear and detailed dissemination plan by asking your partners how, when, where and to whom you can best disseminate your project's results.

For more details, consult the Leonardo da Vinci Guidance Note on Dissemination.⁴ But:

It is highly recommended to **plan and to implement a detailed dissemination strategy from the outset of the project until its end.** This is to ensure that the project is made visible to the relevant stakeholders from the start of the project onwards. Generally, all partners should be involved in some way in the dissemination activities; this is particularly important in Transnational Network projects, although some partners may be more actively involved than others.

Capitalise on your networks. Your partners' networks are useful to demonstrate expertise and experience of dissemination. The dissemination activities can differ from one country to another but this should be seen as an asset. Each partner can gain something from publicising your project; try to use the established networks and experience of each of your partners.

⁴ Dissemination Guidance Note for Leonardo projects available at www.leonardo.org.uk

Good dissemination will help project sustainability. Remember that if the message is not disseminated, the impact of the project will also be limited. The better the project informs the relevant audience about its activities and innovation, the better chance it has to continue beyond the life of Leonardo da Vinci funding.

Some ideas from successful applicants are given below:

UK/01/B/F/PP/129_403 - Developing a Training Programme and Support Materials for International Events Organisers, Events Training Sector Organisation

Dissemination

- Develop and agree a formal dissemination strategy with your partners
- Record dissemination as you go along
- Adopt an appropriate approach to dissemination and think transnational
- Create opportunities for all partners to take part in dissemination activities
- Take the opportunity to talk about your project – contacts can often be made with other relevant organisations during events and seminars
- Having easy-to-distribute documentation from the start of the project helps to publicise and raise awareness of the project (e.g. an A4 leaflet folded in three, postcards, book marks, posters)

The title of your project is also very important. A good title, which can be easily understood by all, will help gain that initial interest in your project which is crucial for successful dissemination. Make sure that other projects have not used your title before, and also that an acronym does not have a double meaning in one of your partners' countries. Titles or acronyms can be more attractive than others. Interesting ones include: "Innov@te", Language for Special Purposes, SOLT (Supporting Online Learning and Teaching), WELCOME (Work Experience Language and Culture of Mobility in Europe), TEECHE (Training for Early years Education and Childcare in Europe), and so on.

2.7 A Thorough Evaluation Plan

Evaluation is also becoming increasingly important but all too often projects see it as an additional and unnecessary expense. Internal evaluation is often planned and peer reviews offer many benefits. Generally, the quality of the products is being evaluated by partners (e.g. training materials, e-learning facilities) as they possess the relevant expertise to do so. However, independent evaluation is most effective and adds to the credibility of the results and may also provide further opportunities for dissemination.

For more details, consult the Leonardo da Vinci Guidance Note on Evaluation,⁵ but consider the following tips:

Ensure that not only your project outputs are evaluated and tested but also the processes (e.g. monitoring, evaluation and partnership).

Consider evaluating an element of the project which might be interesting for your project's partners. For example, a report from an external expert on the development of effective partnership mechanisms might be useful to institutions which apply to future EU-funded programmes. An external evaluation on the quality of the e-learning facilities developed within your project might be of interest to educational specialists. Also an external assessment of the quality of your training materials by employers might contribute towards securing the professional validation of your products.

If carried out during the lifetime of your project, evaluation should be seen as a learning curve.

On the one hand, linking monitoring to evaluation can be beneficial; through evaluation, you can learn about problems and take corrective measures to solve them and alternatively, build on your successes/strengths. As an example, one project promoter forwards the bi-monthly monitoring report received from each partner to the external expert in charge of evaluation; after assessing the progress made in various work packages by each partner, the expert decides whether the project partners have fulfilled their responsibilities. On the other hand, evaluation can be related to your dissemination activities. Finally, the results of evaluation do not need to be necessarily in the form of a report but could also be promoted through other means (e.g. leaflets, posters) which may be more easily disseminated.

The case study below from the University of Kent at Canterbury highlights the practical benefits of independent evaluation:

UK/01/B/F/PP/129_381 - Stepping Stones, University of Kent at Canterbury

The European Institute of Social Services (EISS), University of Kent at Canterbury is managing a multidisciplinary partnership of eight partners from five countries. The aim of the project is to help overcome the discriminatory exclusion of people with learning difficulties (PWLD) from vocational training, from employment and from access to ICT skills, through the development of an interactive, multimedia software package.

The partnership decided to use an external evaluator. The Finnish partner, responsible for evaluation, appointed an independent transnational evaluator from the Rehabilitation Foundation in Helsinki. The Project Manager emphasised the importance of such an evaluator being involved in the early stages of the project and participating in transnational meetings. The evaluation of the first work package revealed some key issues around the preparation phase of the project. Even with a clear and comprehensive proposal that had been agreed jointly and two transnational meetings, some partners were still unclear about the goals of the project and experienced difficulty with some tasks, e.g. dissemination.

The project team took on board the issues raised by the evaluation and, at the third transnational meeting, the project goals, partners' roles and responsibilities were discussed and clarified. This project has demonstrated the value of independent evaluation and has ensured that the lessons learnt are reflected in changes in practice.

⁵ Evaluation Guidance Note for Leonardo projects available at www.leonardo.org.uk

2.8 A Proactive Strategy to Address Equal Opportunities

The Leonardo da Vinci programme seeks to combat disadvantage in the labour market and discrimination in training provision by promoting social inclusion and equal opportunities.

Combating discrimination remains a key issue in the vocational training field in particular, and is one which needs to be given greater consideration. Even those projects that do not directly target the development of practices to facilitate access to training for people most at a disadvantage in the labour market need to consider equal opportunities.

This might include examining issues concerning:

- Involving organisations with direct access to the target group in the project
- Offering support to help disadvantaged groups access training materials e.g. Providing a range of formats
- Tailoring products such as websites to meet accessibility standards (see the disability rights commission for further information www.drc-gb.org, and www.bobby.cast.org to take an online accessibility test)
- Disseminating in a variety of ways to different types of beneficiaries

Remember that an active equal opportunities policy means more than addressing gender inequality. Groups disadvantaged in the labour market can also include people with disabilities, ethnic minorities, people with basic skills needs, low-paid workers and immigrants, to give a few examples. You should also consider specific equal opportunity issues in the particular sector your project will target. Recognising cultural differences within the partnership may mean that the subject of equal opportunity provides another dimension to the project. Addressing this topic might be viewed as anything from *expected* to *radical*, depending on the country in which the project is received.

The issues outlined above are relevant to all aspects of your project and therefore to your partnership as a whole. Consider how you can involve organisations representing your target group as partners, and ensure that all partners have the same understanding of equal opportunities in relation to the work you intend to carry out.

The Leonardo da Vinci programme is open to projects which aim to facilitate access to training for disadvantaged groups, and indeed in the UK there are several such active projects. The case studies below detail projects run by the University of Bristol and Gorseinon College.

UK/00/B/F/PP/129_150 - Broadening Access to Learning, Training and Employment for Deaf and Disabled People (The MAS Project), University of Bristol

This project aims to develop a model for presenting training courses to deaf people entering education and vocational training, and who wish to acquire additional skills for work. The model will use open and distance learning, and online teaching as means of delivery, and will produce a tested model for presenting training courses involving preparation, support and language modules. The project partnership brings together universities, user groups and social partners in Spain, Germany and the UK.

Partners have used a variety of mechanisms to involve the target group in the project and support their participation. For example, the Spanish partners have piloted materials through guided testing with tutor support. Additionally a conference held by the partnership in Berlin was a success with the participation of deaf people as delegates and speakers. Proceedings were translated into German and Spanish, and also into German and Spanish sign language. The proceedings will eventually be available from the project website in the form of a video in sign language.

UK/02/B/F/PP/129_574 - Peer Mentor Support Project, Coleg Gorseinon College

The project will pilot and evaluate the efficacy of using a Peer Mentor Support System for people from specific target groups. The target groups are : Young offenders, disaffected young people, people with disabilities, people with severe learning difficulties and autism and people with mental health problems. The project will produce a comparative study of the peer support methodology with the different target groups in different countries. It will also convert the Peer Educator Training pack produced as a result of a previous Leonardo project (PET) into electronic format and produce a Peer Mentor Training Pack. The project will also aim to accredit both training programmes in the partner countries to provide parity of qualification and thus ease and encourage mobility between partner countries covering Wales, Ireland, Spain and Portugal.

2.9 Robust Social Dialogue

Social dialogue is an important concept for the Leonardo programme. A simple definition of social dialogue includes all types of negotiation, consultation or simply exchange of information among representatives of governments, employers and workers on issues of common interest.⁶ Providing a forum for social dialogue through your project could be an essential part of ensuring that your products meet the needs of both employers and employees. The most obvious way of achieving this is to include the relevant organisations in your project partnership. For example, you could include businesses themselves, or organisations such as Chambers of Commerce which offer you access to businesses. This could be balanced by partners from employee representative groups, such as trade unions, or organisations that represent the target group whose employability you are aiming to increase. The aim of such partnerships is to encourage dialogue between the social partners at sectoral, national and European level in order to increase the usefulness and relevance of project results. Other outcomes might be the development of co-operative frameworks and a collaborative approach to vocational education and training. The case notes below outline the work of The Adult College, Lancaster in this domain:

⁶ Based on the International Labour Organisation's definition of social dialogue (see www.ilo.org)

UK/01/B/F/PP/129_376 - TORTE – Trade Unions as Intermediary Organisations to Increase Key Skills Acquisition, The Adult College, Lancaster

The TORTE project is developing an innovative international partnership of leading trade union support organisations, and educational institutions of national excellence to create a curriculum for trade union officers. The wider objective is to create a new layer of community tutors who can advise fellow workers on a wide range of learning opportunities and solutions to personal learning problems.

The project has an innovative partnership which actively promotes social dialogue through networking with trade unions, employers and basic skills organisations. One of the project's aims is to develop increased co-operation between unions and workplaces. In the UK, training materials are being piloted in a working environment in order to gain employee, employer and trade union perspectives on the materials themselves and on the project's overall approach.

3.0 KEY SUCCESS FACTORS TO WORKING TRANSNATIONALLY

The previous section looked at the importance of research and hard work in establishing a transnational partnership and agreeing a project proposal. If successful at pre and full proposal stage, there will be negotiations with the National Agency before the signature of the contracting agreement. Securing the funding is the first major hurdle but then delivering your project requires more effort and hard work. Transnational working can be an immensely rewarding experience, but its value is directly dependent on establishing clear goals, strong sustainable partnerships and good management structures.

In this section we look at some of the key success factors in the delivery of Leonardo da Vinci projects. These are the views of staff in the National Agency who monitor projects and assess project reports and also views from project promoters themselves. These are divided into eight key areas, including:

- Taking a longer-term view of transnational working (see section 3.1 below)
- Building a strong partnership (see section 3.2 below)
- Recognising and understanding cultural differences (see section 3.3 below)
- Addressing language and communications issues (see section 3.4 below)
- Effective management (see section 3.5 below)
- Monitoring and evaluation (see section 3.6 below)
- Resolving technical issues early on (see section 3.7 below)
- Conflict resolution (see section 3.8 below)

3.1 Taking a Longer-Term View of Transnational Working

Projects should fit with European and national policy as well as your organisation's strategic priorities. It will be easier to justify the benefits to your organisation if there are synergies with existing work. Support and understanding from senior management within your organisation is essential, not just to secure resources, but to ensure that transnational working is a priority for your organisation.

The case study below from King's College, London, illustrates the benefits of taking a longer-term view:

UK/95/2/2620/P/II.1.1.c - European Medical Radiation Learning Development (EMERALD), UK/98/1/80502/PI/III.3.a - EMERALD Internet Issues (EMERALD II) and UK/01/B/F/PP/129_381 - European Medical Imaging Technology Training (EMIT), King's College, London

The success of King's College's first Leonardo da Vinci project, the EMERALD project (European Medical Radiation Learning Development), can be regarded as a good example of taking a long-term view of transnational working. It had a strong multiplayer partnership, which was backed up by a strong institutional support across the partnership. In addition to King's College, the partnership comprised other universities (Lund University, University of Florence), university hospitals (Centre Hospitalier Universitaire de Grenoble, Lund University Hospital), a European Federation (European Federation of Organisations for Medical Physics) and the King's Healthcare NHS Trust in the UK.

EMERALD aimed at developing the first structured training for medical radiation physicists and produced three transnational training modules in medical radiation physics.

The success of the EMERALD project then led to EMERALD II (Internet Issues), which aimed to further develop and disseminate the materials. This included “train the trainer” seminars and the development of EMERALD multimedia to be suitable for Internet distribution and distance learning. EMERALD II involved both old and new partners and led to the creation of a new network of medical physics professionals who would introduce the training materials into their own training systems.

These projects have had a broad impact, not only on a European level, but also on the way in which medicine is practised around the world. The EMERALD materials and CD are now being used extensively across Europe, and have been adopted throughout France as a matter of national policy. The global impact has also been considerable: the materials are being used in 40 countries.

King’s College are now working on a further project, the EMIT project (European Medical Imaging Technology Training) to develop work-linked training in hospitals on Ultrasound and Magnetic Resonance Imaging Technology. This project is different to the EMERALD projects; however, the knowledge and experience gained and the strong partnership links made in the previous projects will be invaluable.

This case study clearly illustrates the benefits of support from your own organisation and your partner institutions. This has enabled the partnership to take a longer-term view of transnational working and has helped them to reach such a global impact. Further information about the projects can be found at <http://www.emerald2.net>.

3.2 Building a Strong Partnership

Strong relationships built over time produce good projects and good projects generate sustainable innovation. Key success factors include:

- A sense of shared values
- An understanding of common goals
- A commitment to transnational working
- The right mix of expertise
- Clear roles, responsibilities and milestones

To build a robust partnership, it should be remembered that:

- Mechanisms for evaluating project work and for resolving conflicts are needed
- All partners need to feel included and that they are contributing effectively to the project
- Good support for the “weaker” partners is recommended, as these might be smaller voluntary organisations, partners new to transnational work or those with limited resources
- Capitalising on the expertise of each of the partners helps to sustain the efforts made by all
- Sharing the responsibility of carrying out the work of the project can also contribute to developing a sense of ownership by other partners. As an example, as a project is often subdivided into five work packages, each partner could be given the responsibility for one work package.

The case study below demonstrates the benefits of a strong partnership:

UK/01/B/F/PP/129_450 - The Employment Training Project, ASILESP

The Employment Training project is designed to promote the equality of access to initial and continuing training and employment to persons disadvantaged in the community by autism.

The project's transnational partnership is very successful for various reasons.

First, this project is based on existing good working and personal relationships developed during a previous Leonardo da Vinci project.

Secondly, the partnership is robust due to the geographical coverage, diversity and strong expertise of the organisations involved. Partners are drawn from the UK, Spain, Ireland, Finland and Belgium and can be divided into the following categories:

- Organisations working with users: including training centres for young people with autism: Autism Initiatives (UK), Gautena (Spain), The Irish Society for Autism (Ireland), and World Autism Organisation (Belgium);
- Software designers: Asilesp Ltd, an SME specialising in educational and distance learning software (UK) and Comp-aid Ltd (Finland), a provider for communication, aids, access solutions and special education programmes.

In addition, the relevant audience has been targeted. Not only are autistic children, carers and tutors involved and concerned with this project but also employers, the project's aims being to help the beneficiaries to adapt and understand working practices and environments. A training course will therefore be designed to assist employers in understanding the specific behaviours and ways of working with people affected with autism (i.e. how to communicate, to ensure health and safety issues, etc.).

To sum up, the major factors contributing to the success of this partnership are built upon previous close co-operation, and the capacity of the partners and their strong personal commitment to the overall project objective. All these organisations are very committed as they share a long history of work, similar interest and willingness to help this disadvantaged group of people.

The dynamics of partnerships developed under the Transnational Network measure of the Leonardo da Vinci programme are sometimes different to those developed under the Pilot projects measure. These projects focus on the development of transnational networks to facilitate the transfer and exchange of experience and good practice rather than the development of products.

The case study below from Careers Europe illustrates some of the mechanisms contributing to strong partnership working within a Transnational Network:

UK/01/B/F/NT/129_457 - Guidenet, Careers Europe

The Guidenet project is designed to establish a European network of expertise in the field of guidance. The network aims to gather together guidance initiatives, evaluate and comment upon them and to disseminate them as widely as possible within the guidance communities across Europe.

The network involves organisations from across Europe and has been developed with a three-layer structure of partners: Core Partners, Permanent Relay Points and Occasional Correspondents. The original network involved 32 partners, however it has now enlarged to include over 80 members and it is still continuing to expand.

The maintenance of such a large network has involved various mechanisms. Core Partners manage the running of the project, the Permanent Relay Points are actively involved in the project and responsible for national networks, and the Occasional Correspondents are less active but have full access to project materials.

The partnership also uses a range of tools to facilitate communication across the network. The Core Partners have encouraged research into national examples of good and innovatory practice to develop a database of sources. They have also identified themes of interest and created discussion groups. The Permanent Relay Points and Occasional Correspondents have contributed by undertaking surveys and literature searches in addition to their involvement in the discussion groups. The project website includes the web-board where all members can post and view messages and information.

These mechanisms have enabled the project to successfully develop a strong partnership and create a dynamic network where expertise and experience can be shared. Further information about the project can be found at www.guidenet.org.

3.3 Recognising and Understanding Cultural Differences

One of the most rewarding aspects of transnational collaboration, but often the most challenging, can be working across different cultures. Sometimes cultural issues can be underestimated but an understanding, together with an open mind and willingness to try different approaches, is essential to build effective transnational partnerships. Depending on which countries you are working in, cultural differences can include distinctions in:

- Legal and financial systems
- Religious beliefs
- Holiday times, public holidays
- Ways of doing business
- Levels of formality
- Responses to colours and symbols
- Equal opportunities

The two case studies below are Language Competence projects funded by the Leonardo da Vinci programme. They are looking at language and cultural issues and their importance in international work. The REFLECT project is aimed at helping export companies overcome language and cultural barriers that they face, and the EMBER project highlights business and cultural issues that companies need to consider when operating in different countries.

UK/00/B/F/LA/129_079 - Review of Foreign Language and Cultural Training Needs Project (REFLECT), Interact International

REFLECT (2000) is a transnational initiative to promote the economic and mobility value of acquiring linguistic and cultural competences. With partners in Southern Ireland, Poland, Portugal and the UK, the aim of the project is to help small and medium sized companies trade abroad. The project has developed a practical guide on how to overcome language and cultural obstacles. It gives examples of good practice as well as providing links to language trainers, interpreters and translators. The details of the project and the guide can be found on the project's website: www.reflectproject.com.

UK/02/B/F/PP/129_566 - The Effective Marketing for Businesses in European Regions (EMBER), The University of Salford

The EMBER project (2002) aims to help companies become informed about cultural practices in business. In order to fully exploit the European market to its full potential, it is acknowledged that companies need to understand not only the business but also the cultural environment of another market within which they wish to operate. This project is specifically looking at the impact of culture when conducting business in a cross-sectoral environment, the do's and don'ts of working in a particular country and the role of culture and its usefulness as a broad indicator of levels of market demand.

The project aims to increase the export and import potential of European small businesses wishing to trade internationally by offering them an online guide. The information will be accessible at any time and anywhere at www.ember.eu.com, saving time and costs to businesses that are unable to release their employees for training in conventional ways.

The Languages National Training Organisation's project highlighted overleaf is more focused on improving cultural competence:

UK/01/B/F/PP/129_315 - Intercultural Competence Assessment (INCA), Languages National Training Organisation

This project from the 2001 Call for proposals is targeting the engineering sector where employees are increasingly expected to be globally mobile and bridge language and cultural barriers. The project aims to produce an assessment framework for intercultural competence, a part-computerised diagnostic tool and a record of achievement for the assessment of intercultural competence linked to language competence and subject knowledge competence. Consequently, the awareness and understanding of cultural differences/issues of employees are raised.

In this project, culture is defined as “a specific set of values, beliefs and behaviours”. And therefore “intercultural competences are skills, knowledge and attitudes”. “Intercultural competence comprises four main activities: to perceive – to interpret – to interact – knowledge (to know). In intercultural situations, knowledge includes both knowledge about culture and knowledge about intercultural situations.” For further details visit the project website at: www.incaproject.org.

Transnational projects use alternative approaches to build a better understanding of the different cultures working in the partnership. Transnational meetings are often rotated so that each country has the opportunity to host the meeting. Often the meeting will include an introduction to the country or region, study visits, etc. so that a better understanding can develop. Other projects organise cultural awareness briefings or training sessions for the partnership. Sometimes you just learn the hard way as Sue found out in the case study below:

UK/01/B/F/PP/129_438 - A New and Flexible Approach to Training in Construction, University of Sheffield

Sue Armstrong, who is now an experienced transnational co-ordinator, remembers her first Leonardo da Vinci transnational project meeting and how it did not get off to a good start. None of the partners had ever met before and the first item on the agenda of the first day was the project finances. The idea was to get the finances agreed and move on to the project delivery. However, partners were unhappy discussing the figures before looking at the whole project and the roles and responsibilities of each partner. It was a difficult meeting and Sue says that she learnt a lot from the experience. Now she ensures that partners get the chance to meet informally, perhaps a dinner the night before the main meeting, and that sensitive issues like finances are left until relationships and trust have build up in the team.

Other projects have also benefited from arranging a dinner the evening before the first meeting, and have found that the meeting goes much smoother when everyone feels more relaxed in each other's company. Another way of building better working relationships is to establish a two-level management structure within the promoting organisation. One person will be solely responsible for all financial issues and will update the partnership during transnational meetings; another person from the promoting organisation will deal with the more content-related and cultural aspects of the partnership.

Closely linked to cultural issues are the challenges of communicating effectively across a transnational partnership.

3.4 Addressing Language and Communications Issues

Developing trust, knowledge and understanding of your transnational partners is essential for effective working. However, with cultural differences, geographical distances and language barriers, this is one of the greatest challenges.

Be practical when choosing partners and consider the language skills that you and your partners offer. Agree a working language for the project but be sensitive to the differing language abilities and the fatigue factor in meetings.

In terms of languages think about:

- Recruiting new staff with the necessary skills
- Clearly budgeting for expensive translation and interpretation costs. Ensure that new potential partners possess both the requisite language skills and the technical knowledge of the area
- Support staff in learning a new language – even a basic knowledge will break down barriers and help staff feel more comfortable abroad
- Where possible capitalise on student exchanges, staff in other departments with language skills but remember that language skills need to be linked to technical know-how
- If you are going to split your team into working groups, consider the languages as well as the topics and individuals concerned

All partners need to be kept up-to-date and informed about the project. Partnerships use a mix of media including newsletters, e-mails, intranets, discussion forums (e.g. chatroom facilities), notice boards, video-conferencing, etc. You need to check what suits your partners and whether they have access to the necessary technology. It is generally agreed that e-mail is useful and cost effective but regular telephone contact and transnational meetings are essential to generate team spirit and motivate all partners. Do not underestimate the usefulness of informal networking at transnational meetings to raise difficult issues or to address partner concerns before they become major problems.

A few suggestions from project promoters to overcome the challenge of communication across different countries are listed below:

- Many project promoters have developed a glossary of terms, translated into each partner language, to avoid misunderstandings.
- During transnational meetings, project contractors also often stress the importance of being as clear and detailed as possible and of leading the meeting in a dynamic way, for example by using various ways of relaying and presenting information. This can be done by giving partners clear summaries and updates on the progress made and on the tasks ahead, by using PowerPoint presentations or by including various presenters such as the external evaluator, the person in charge of project financial monitoring, etc.;
- In order to ensure that partners also feel committed to your project's achievements, consider giving project partners the responsibility to lead and to present the progress made during transnational meetings (instead of you as the contractor).
- Finally, very clear and detailed minutes should be written after each transnational meeting. These are the most valuable tools to ensure the proper monitoring of your project. In the minutes, try to clearly identify the nature of the work to be carried out, the deadlines and the person responsible. An example of a meeting agenda is provided in Annex 6.

The case study below highlights some of the practical issues:

UK/00/B/F/LA/129_019 - Trans-Europe Emergency Services Language Training, Essex County Fire & Rescue Service

Pat, an experienced promoter involved with a Language Competences project, provides advice on effective communication:

“There are many key aspects to successful management of such a project. It is essential to really get to know your partners, and good communication among the partners is absolutely crucial. Regular meetings are a useful way to get to know partners, as well as to air any issues and problems. In developing the project’s management and training package, the assumption was that everything would run in the same way across the transnational partners. However, it didn’t, and cultural differences had also to be taken into account. The most important ingredient, however, was the partners’ commitment to the project. All in all, the management of the project has been hard work, but above all it has also been fun, and has enabled the contractor to develop good relationships and friendships with people and organisations across Europe.”⁷

The case study below illustrates how the meaning of specific terms and concepts can vary across countries. This is followed by an example of a project that had several communication barriers to overcome at once.

UK/01/B/F/PP/129_388 - An Advice Toolkit for Business Advisers and others Offering Assistance to Women Entrepreneurs, The Back to Work Company

The Back to Work Company in Leeds co-ordinated a Leonardo da Vinci pilot project with five partners from four countries. The project initially set out to develop an advice toolkit for business advisers offering assistance to women entrepreneurs.

The toolkit explored issues relating to work-life balance, but the project partners had very different ideas as to what this meant. One of the first tasks was to agree a common definition for the term “work-life balance” for the project. The final definition was “being able to combine successfully professional and personal life”. In Greece the word “work” is used instead of “professional” as this had more meaning to the Greek target audience.

⁷ Leonardo Showcase Event, 28 February 2003

UK/00/B/F/PP/129_150 - Broadening Access to Learning, Training and Employment for Deaf and Disabled People, University of Bristol

In terms of communication, some projects will have more complex needs. The MAS project managed by the University of Bristol was determined to involve deaf people at all levels in the project's work. This meant their last conference in Germany required not only translation of the proceedings into partner languages but also into English, German and Spanish sign language.

3.5 Effective Management

Transnational working does not just happen once the agreement is signed. To work it needs careful planning, good organisation and effective management.

One of the first tips is for the project contractor to start the project well and this should be done during the first transnational meeting. In other words, clear working relationships and partnership arrangements (which will consequently often lead to personal relationships) need to be established (e.g. explaining the nature and meaning of partnership agreements, etc.).

For better monitoring and work relationships within the project, it is recommended to clearly identify and agree partnership management arrangements. Formally, the partnership agreement between the promoter and each partner is legally binding. However, partnership arrangements might also need to be made and agreed by all partners, i.e. meeting minutes are formal decisions of all partners and deadlines agreed should therefore be respected.

Other suggestions to facilitate effective management include:

- Treating each other as equals: ensure a democratic process
- understanding and working with cultural differences
- ensuring that each partner feels that they are contributing and that their inputs are valuable
- leading by example by always providing documents on time,
- using variety of ways to communicate including a message board, telephone, e-mail, meetings, etc.
- ensuring that partners feel comfortable to recommend changes or improvements
- ensuring that a lot of work is done between meetings so that when partners meet they take decisions
- for each meeting to have a theme and subjects for discussion flagged up well in advance so that partners have plenty of time to prepare their ideas and responses
- Organising meetings six months in advance, documents in advance, producing minutes, etc.
- Ensuring that good management and monitoring systems are in place, agreed and understood
- In the case of larger projects, ensuring that sufficient resources are allocated for transnational co-ordination
- Addressing intellectual property rights and copyright issues at the early stages of the project and ensure there is agreement from all the partners

Below is a compilation of tips by various project promoters on successful project management covering partnership, communication, monitoring content and financial mechanisms.

Be confident in your partnership

- Have the confidence that the partnership has the skills and expertise
- Make sure that the relevant people (i.e. decision makers) attend your transnational meetings - this will save you time
- Establish management committee and clarify role and relationship to other project members
- Identify tasks and each partner's role (*which all need re-emphasising at every meeting and via e-mail in the interim between meetings*)
- Be inclusive and ensure each partner has specific responsibilities
- Sharing the work equitably between partners reflects a good working partnership; ensure that each partner therefore feels their contribution is necessary and indispensable

Be attentive to communication

- Clarity, clarity, clarity
- Communicate regularly! Maintain regular contact, not just at deadlines
- Keep calm
- Have a contingency plan for when things go wrong
- Talking will often result in a successful outcome

Carry out your workplan

- Develop a work programme identifying project milestones and partner action. Try to review this at each partner meeting
- Define clear workplan with **Specific, Measurable, Achievable, Realistic and Timebound (SMART)** objectives
- Clearly state the project objectives AND how YOU will manage the project
- Give an update on the progress of your project at each of your transnational meetings

Establish clear content and financial monitoring mechanisms

- Place emphasis on the financial structures and constraints, ensuring that partners **KNOW** what and how to claim
- One person can be identified as responsible for monitoring financial position and providing regular reports
- Ensure project monitoring or keeping a track of your partners' spending
- Ensure that evidence is collected on a regular basis (transnational meetings could be an opportunity to collect these)
- Use the financial tables from your Interim/Final reports - it is easier
- Ask for regular project reports by each partner – at partner meetings and via e-mail. As an example, every two, four or six months, each partner needs to provide information and evidence on: Expenditure – by category; Receipts – copies; Staff costs and overheads; Activities; Dissemination and evaluation

Below are some recommendations on how to carry out the workplan effectively and how to manage the partnership successfully:

UK/95/2/2620/P/II.1.1.c - European Medical Radiation Learning Development (EMERALD), UK/98/1/80502/PI/III.3.a - EMERALD Internet Issues (EMERALD II) and UK/01/B/F/PP/129_381 - European Medical Imaging Technology Training (EMIT), King's College London

Colin, an experienced project promoter, makes the following recommendations on managing the workplan:

“To be successful, ‘close-to-reality’ planning of the project phases was needed, by being very prescriptive about exactly how long things were going to take. The development was distributed among several parallel groups, which caused difficulties when everyone was doing different tasks, albeit towards a common goal. This is where trust and the partners’ discipline and commitment were essential. The balance of partners’ topics and skills was important too, along with the need to monitor progress regularly, keeping to internal deadlines. The exchange of intermediate results was key and there was continuous communication, particularly by e-mail.”⁸

3.6 Monitoring and Evaluation

Transnational working requires continuous monitoring and evaluation. Much guidance is available but it is worth mentioning a few key principles that contractors have highlighted:

- **Agree with your partners how you are going to monitor and evaluate your project.** To do the job properly you need their full collaboration. To do so, we recommend that you discuss and agree your monitoring mechanisms with your project partners. This can also be very useful when, for various reasons, a partner does not or cannot achieve the work by the deadline. One of the mostly used methods is for the project contractor to give regular updates on the past and future work via the project website (e.g. intranet facility) as well as sending additional e-mail messages to partners to remind them about the tasks to be carried out.
- **Be clear what you mean about evaluation and promote the benefits** as some countries/partners will not be very familiar with evaluation activities and may view them with suspicion.
- **Be clear from the outset what information you require from partners, in what format and when.** Think ahead to your reporting requirements and use the same formats to help reduce the length of time it can take to assemble progress reports and claims for payment.
- **Try to carry out an independent project evaluation** (peer review is useful but can be awkward)
- **A few more words about monitoring.....**for better monitoring, it is very important for the project contractor to inform all partners about their contractual obligations as well as about their own. This includes the contractor completing the Interim/Final Reports for submission to the National Agency. The reports should list the progress made and the expenditures incurred during the period covered. Examples include the completion of reports (e.g. bi-monthly or quarterly reports) and the provision of the relevant documentation justifying the costs incurred (e.g. invoices, travel tickets). It is also important to highlight the contributions your partners can make in order to help you to complete the

⁸ Leonardo Showcase Event, 28 February 2003

reports. As an example of bi-monthly or quarterly reports, many project contractors use the same format as the Interim/Final reports.

For better monitoring processes, it is also highly recommended to discuss and agree your monitoring mechanisms with your project partners. The project below illustrates one good way on how to monitor the project's progress within the partnership:

UK/01/B/F/PP/129_377 - Assisting Sole Traders to Undertake Tailored Employment, Omagh Enterprise Company Ltd

The Omagh Enterprise Company's Transnational Partnership consisted of six partners from a total of five countries. Roles and responsibilities were clear from the outset, and each partner had also been allocated lead responsibility for one of the work packages. The partnership was a new partnership, with only some of the partners having worked together previously. That collaboration between the partners was productive was partly due to the fact that the first project activity was something very specific (e.g. Training Needs Analysis), giving partners something to "get their teeth into".

As part of the contractor's monitoring of the work programme, some chasing of partners was required in order to get them to respond to action points. As a result, during a transnational meeting, the partnership all agreed that the promoting organisation should send out a weekly e-mail which would be addressed to the whole partnership. The e-mail would contain colour coded lists showing what partners had done (in black), what was outstanding (in blue) and what was overdue (in red). This very practical approach was negotiated and accepted by all of the partners. All partners knew when the e-mail was due, and that any overdue actions would appear on it with their organisation's name against it. Of course, the whole partnership was also made aware of the work that had been completed, and the regular e-mails had a positive effect on the productivity of the partnership.

A few recommendations from project promoters on carrying out effective evaluation plans are described below:

UK/02/B/F/PP/129_543 - Raising Horizons, The Foundation for European Initiatives

Your evaluation plan should be ongoing throughout your project. We recommend having evaluation as a standing item in the agenda for your partner meetings. Also ensure that you have a clear plan with designated people to co-ordinate this area of activity.

Evaluation is a continuous cycle. In most cases, internal evaluation or testing takes place on the quality of the training materials/package. The contractor should ensure that partners are asked to evaluate materials at all stages of development. This encourages ownership and provides evidence of work completed to ensure payment. To do so, a typical e-mail request could be:

*“Dear Partners,
Both “Work with Me” and the Employer’s Course are now ready for further evaluation. I would be grateful for your comments, suggestions and amendments by July 4th at the latest. You can access these courses at <http://216.26.175.202>. User name: >>>> Password: >>>> (ensure these links work!).”*

Another good idea is that of developing a formative evaluation (i.e. assessing whether the trainee as a learner gains the correct knowledge) combined with a summative evaluation (i.e. checking whether the learner can apply the knowledge gained throughout the training).

3.7 Resolve Technical Issues Early on

This is a broad heading that tries to capture some situations faced by projects working transnationally. It is worthwhile considering these issues as early in the project as possible and ensuring that you have the relevant expertise within your partnership or can budget for subcontracting costs.⁹

Below are some recommendations from a project contractor on how to resolve technical issues successfully:

UK/95/2/2620/P/II.1.1.c – European Medical Radiation Learning Development (EMERALD), King’s College, London

Colin, an experienced project promoter, tells of how technical issues may arise when developing innovative products :

“Reality is different from practice... Various problems were encountered in the project’s first two years. The training modules were very complex and the technological difficulty of the project was enormous. There was also an uneven distribution of the workload among the partners, and co-ordination was difficult across the partner countries.

Some further problems were experienced. The plan had been for everything to be electronic, but some use was made of paper format, as that was easiest and efficient . Unfortunately, this meant that printing costs soared. Some conservatism was encountered – people did not like being told what to do, so their reaction to the material was ‘we didn’t design this, we don’t really want it’. It was necessary to build flexibility into the training, and one of the biggest hurdles was to get people to understand that they could dip into the materials in the same way as a textbook. It took a long time to get that message across.”

⁹ See the *Administrative & Financial Handbook* for rules covering subcontracting costs.

With the popularity of e-learning there is an increasing need for projects to provide access to resources in web-based formats. Some organisations are already familiar with the technology, some are getting to grips with different platforms or systems, whilst others have never used such technology. In the University of Sheffield's Leonardo da Vinci's pilot project - A New and Flexible Approach to Training for Engineers in Construction – the first task undertaken was a comprehensive review of web-based tools for training delivery. Finally, the partners agreed to use WebCT.

Once the technology has been chosen it is essential for each partner to be fully trained in its use so that they are comfortable using the tools. The TUC faced similar issues to Sheffield University with their LearnOnline software:

UK/01/B/F/PP-129_355 - Web-Based Information Technology Training (WEBBITT), Trade Union Congress (TUC)

Managed by the Trade Union Congress (TUC), the project seeks to develop the relevant materials to deliver two modules of the European Computer Driving Licence through the use of new technologies – principally a virtual classroom format.

The LearnOnline software provides a very flexible system and can be used with Internet connection and hosted on an intranet but is not invasive to IT structures. It enables a tutor, without specialist IT skills, to set up and run a virtual classroom format and use existing materials, videos, etc., with students. The software is currently being upgraded to provide a facility for real-time screen exchange. The software can also be used for project management and communications with facilities for exchanging views and storing key documents.

The project encountered an initial problem where the Hungarian partner was unable to use the same interactive CD-ROM as the other partners. This situation was resolved by using an additional Hungarian interactive CD-ROM. At the half-way point in the project there were some indications that the transnational partners still needed to get to grips with the use of this new technology. This was both in terms of being able to use it to pilot the project materials and to use the software as a project management and communications tool. Additional training and support was provided to address this issue.

3.8 Conflict Resolution

Even in the best-run partnerships conflicts can arise. Preparation is crucial in dealing with this kind of problem so that the promoter and partners are aware from an early stage of what will happen should disagreements occur within the project. It is also important to ensure that conflicts are dealt with calmly and action is only taken with the consensus of the whole partnership.

The answers to the following key questions will offer some guidance:

How will you identify that there is a problem within the partnership?

You need to consider where you would draw the line between a minor disagreement and a full-blown conflict. Additionally, think about what constitutes a real threat to the success of the project as opposed to a temporary setback which may resolve itself in time.

What is the best way to react to potential or real conflict?

Think about the best way to nip a potentially difficult problem in the bud before it becomes more serious. Try to avoid escalating problems – perhaps a private discussion would be more constructive than a discussion in public at a partner meeting. Keeping yourself informed about the activities and progress of partners will allow you to spot problems at an early stage and perhaps avert disaster. Also, try to be aware of what lies behind problems so you can react in an appropriate way - a personality clash between two partners will need to be dealt with differently to a situation where one partner is not delivering their work.

Who will be responsible for mediation between partners?

Whilst the promoter might be best placed to take responsibility for solving problems, what happens when the promoter is involved in the dispute? The input of a “neutral” partner may be invaluable in offering a different perspective on the issue.

What are the potential problems and sources of risk for your project?

You need to identify the problems that your project could face. These sources of risk may alter or decrease/increase in importance over time. Take time at the different stages of the project to think about how it is progressing, how well the partners are working together, and what might stand in the way of achieving your aims.

Other tips include:

- Ensuring all partner agreements are precise and not vague in terms of partner roles, responsibilities and obligations (see 3.5 Effective Management for further details)
- Ensure open dialogue
- Discuss issues of concern with partners and ensure that two-way communication channels are developed from the project’s outset
- Regular partnership meetings
- Consensus of partners

4.0 SUMMARY

The main result, and indeed the cornerstone, of a good Leonardo da Vinci project is the development of a successful transnational partnership to improve quality, foster innovation and promote the European dimension in vocational training. As transnational working is such an integral part of a Leonardo da Vinci project, think hard about whether you have the resources and organisational backing to work successfully across Europe.

Bidding is highly competitive so ensure that you address the following key issues at the **project development stage**:

- Perhaps you are developing a new approach or methodology or a new partnership, but you must be able to clearly demonstrate how your project is innovative
- Ensure that you involve your partners in the design and development of your project. Their involvement in the early stages will not only strengthen the proposal but ensure their enthusiasm and commitment to the project
- Your project must meet a real need and you have to provide a strong justification to demonstrate this at national and EU level
- Your transnational work will have to add value – if it can be done nationally then the Leonardo da Vinci programme is not the right funding mechanism
- Your results will have to be disseminated widely to achieve the desired impact so all partners will need to be involved and the sooner activities start the better – this is particularly important in the case of transnational network projects
- Opening your transnational working to external, independent scrutiny will help organisational learning and add credibility to your results
- Where possible take a proactive role to combating disadvantage and discrimination by promoting social inclusion and equal opportunities

Once your funding has been secured, **delivering your project** requires more effort and hard work. Working transnationally can be an immensely rewarding experience, but its value is directly dependent on:

- Building strong sustainable partnerships through establishing clear goals, sharing the responsibility for the project and capitalising on the expertise of the consortium
- Establishing good, transparent management structures, ensuring careful planning, good organisation and effective management
- Understanding cultural and linguistic barriers and being open to different approaches as this will develop trust, knowledge and understanding across your partnership
- Continuous monitoring and evaluation to keep the project on track and to ensure that your consortium, and a wider audience, can learn from your experiences

- Spreading the word, your results need to reach a wide and varied audience to ensure maximum impact
- Addressing and resolving key issues early on to ensure the project runs smoothly and that the partnership can look forward to further joint work

And, finally, you have to enjoy the experience or the late nights and travelling will become a chore.

Annex 1

Further Information on the Leonardo da Vinci Programme

Further information about the Leonardo da Vinci programme in the UK is available from the UK website www.leonardo.org.uk and from the National Agencies as follows:

Pilot Projects, Language Competences and Transnational Networks (Procedure B Projects)

Leonardo UK National Agency
ECOTEC Research & Consulting Ltd
Priestley House
12-26 Albert Street
Birmingham B4 7UD
Tel: +44 (0)121 616 3770
Fax: +44 (0)121 616 3779
E-mail: leonardo@ecotec.co.uk

Mobility Projects – Work Placements and Trainer Exchanges (Procedure A Projects)

Leonardo UK National Agency
British Council, Education and Training Group
10 Spring Gardens
London SW1A 2BN
Tel: +44 (0)20 7389 4389
Fax: +44 (0)20 7389 4426
E-mail: leonardo@britishcouncil.org

Thematic Actions, Reference Materials and Joint Actions (Procedure C Projects)

Joint International Unit
Department for Education and Skills / Department for Work and Pensions
European and International Programmes
Room 4A
Caxton House
6-12 Tothill Street
London SW1H 9NA
Tel: +44 (0)20 7340 4488
Fax: +44 (0)20 7340 4324

N.B. While the JIU can provide some general guidance on project proposals, the European Commission is directly responsible for assessing, contracting with and managing these projects.

Annex 2

Other sources of EU funding

The Leonardo da Vinci programme differs from other projects funded by the European Union which focus on Research and Development (e.g. Sixth Framework Programme funded by DG Research and Development) or in the field of Regional Policy (e.g. Objective 1 projects financed by Structural Funds). Information for the UK can be accessed via the European Commission Representation in the United Kingdom at www.cec.org.uk. The European Commission Representation also produces a booklet called *Funding from the European Union*, which gives an overview of EU funding programmes – a web version can be found at <http://www.cec.org.uk/info/pubs/funding/contents.htm>.

Websites

EQUAL

Funded through the European Social Fund, EQUAL is an initiative which tests and promotes new means of combating all forms of discrimination and inequalities in the labour market, both for those in work and for those seeking work, through transnational co-operation. Equal also includes action to help the social and vocational integration of asylum seekers. Equal operates across identified thematic fields which embrace the four pillars of the European Employment Strategy and support for asylum seekers.

www.equal.ecotec.co.uk and www.europa.eu.int/comm/employment_social/equal/index_en.html
(Links to ADAPT and EMPLOYMENT are also available at this site).

DG Regional Policy (for Structural Funds)

Despite being one of the most prosperous regions of the world, there are still striking disparities of income and opportunity between the 250 regions of the European Union (EU). These may be due to the underdevelopment of some regions, economic decline or location at the periphery of the Union. Regional Policy is both an instrument of financial solidarity and a powerful force for economic integration.

www.europa.eu.int/pol/reg/overview_en.htm

Further Reading

ADAPT and EMPLOYMENT Community Initiatives (1997) “Guide to Transnationality for Project Promoters”, European Commission, Employment and Social Affairs Directorate

“The EQUAL Guide on Transnationality”, published by the European Commission. A full copy can be accessed online at:

http://europa.eu.int/comm/employment_social/equal/data/document/transnatguide_en.pdf

Annex 3

Checklist of Resources Required for Transnational Project Work

Resources and conditions	Exists	Can acquire	Unlikely to acquire
A partnership team with members who, between them, have the right aptitudes, skills and experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A team leader who is prepared to make the necessary time commitment, be a concerned host to transnational visitors, and is well informed on transnational matters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sufficient time allocation to the team for the range of activities to be delivered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language skills or access to interpreters/translators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of office and communications systems (telephones with international direct dial, fax, e-mail, computers with Internet access, photocopier, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Robust finances to deal with negative cash flow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The commitment of your own organisation's key players (chief executive, senior managers, finance director and other key members of staff)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mechanisms to transfer experiences and results from transnational work to all partners and participants and to local, national and European policy makers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This table has been taken and adapted from "The EQUAL Guide on Transnationality", published by the European Commission. A full copy can be accessed online at

http://europa.eu.int/comm/employment_social/equal/data/document/transnatguide_en.pdf

Annex 4**Case study Contacts**

Project Number:	UK/01/B/F/PP/129_388
Project Title:	Advice Toolkit
Promoter:	The Back to Work Company
Contact person:	Karen Roberts
E-mail:	mail@thebacktoworkcompany.com
Website:	http://thebacktoworkcompany.com/
Project Number:	UK/01/B/F/PP/129_377
Project Title:	Assisting Sole Traders to Undertake Tailored Employment
Promoter:	Omagh Enterprise Company Ltd
Contact person:	Nicholas O'Shiel
E-mail:	nicholas.oshiel@oecl.co.uk
Website:	www.oecl.co.uk
Project Number:	UK/00/B/F/PP/129_150
Project Title:	Broadening Access to Learning, Training & Employment for Deaf & Disabled People
Promoter:	University of Bristol
Contact person:	David Moorhead
E-mail:	david.moorhead@bristol.ac.uk
Website:	http://acceso.uv.es/mas/index.html
Project Number:	UK/00/B/F/PP/129_106
Project Title:	Craft Into Technology – Technology Into Craft
Promoter:	Dudley College
Contact person:	June Johnson
E-mail:	June.Johnson@dudleycol.ac.uk
Website:	www.dudleycol.ac.uk
Project Number:	UK/01/B/F/PP/129_403
Project Title:	Developing a Training Programme and Support Materials for International Events Organisers, Events Training Sector Organisation
Promoter:	Events Training Sector Organisation
Contact person:	Peter Worger
E-mail:	ace@martex.co.uk
Website:	http://www.europeaneventsproject.com/
Project Number:	UK/02/B/F/PP/129_566
Project Title:	The Effective Marketing for Businesses in European Regions (EMBER)
Promoter:	The University of Salford
Contact person:	Vera Barron
E-mail:	v.barron@salford.ac.uk

Project Number: UK/01/B/F/PP/129_450
 Project Title: The Employment Training Project
 Promoter: ASILESP
 Contact person: Paul Quantock
 E-mail: info@asilesp.com
 Website: www.asilesp.com

Project Number: UK/95/2/2620/P/II.1.1.c, UK/98/1/80502/PI/III.3.a and UK/01/B/F/PP/129_308
 Project Title: European Medical Radiation Learning Development (EMERALD), EMERALD Internet Issues (EMERALD II) and EMIT
 Promoter: King's College London
 Contact person: Slavik Tabakov
 E-mail: slavik.tabakov@kcl.ac.uk
 Website: www.emerald2.net/

Project Number: UK/01/B/F/NT/129_457
 Project Title: Guidenet
 Promoter: Careers Europe
 Contact person: Mick Carey
 E-mail: mickc@careersb.co.uk
 Website: www.guidenet.org

Project Number: UK/01/B/F/PP/129_315
 Project Title: Intercultural Competence Assessment (INCA)
 Promoter: Languages National Training Organisation
 Contact person: Linda Cadier
 E-mail: linda.cadier@languagesnto.org.uk
 Website: www.incaproject.org

Project Number: UK/02/B/F/PP/129_574
 Project Title: Peer Mentor Support Project
 Promoter: Gorseinon College
 Contact Person: Caroline Townsend Jones
 E-mail: CAROLINE@gorseinon.ac.uk
 Website: www.peermentor.bdf.es

Project Number: UK/02/B/F/PP/129_543
 Project Title: Raising Horizons
 Promoter: The Foundation for European Initiatives
 Contact person: Kevin Osmond
 E-mail: info@tfei.org.uk
 Website: www.tfei.org.uk

Project Number: UK/00/B/F/LA/129_079
 Project Title: Review of Foreign Language and Cultural Training Needs Project
 Promoter: Interact International
 Contact person: Helena Christie
 E-mail: InterActInternational@compuserve.com
 Website: www.reflectproject.com
 Project Number: UK/01/B/F/PP/129_381

Project Title: Stepping Stones
Promoter: University of Kent at Canterbury
Contact person: Alex Stevens
E-mail: a.w.stevens@ukc.ac.uk
Website: www.ukc.ac.uk/eiss

Project Number: UK/00/B/F/PP/129_117
Project Title: Supply Chain Management in the Music Industry across the Internet
Promoter: University of Huddersfield
Contact person: Glenn Hardaker
E-mail: g.hardaker@hud.ac.uk
Website: www.hud.ac.uk

Project Number: UK/00/B/F/PP/129_376
Project Title: Trade Unions as Intermediary Organisations to Increase Key Skills Acquisition
Promoter: The Adult College Lancaster
Contact person: Peter Garrod
E-mail: Pgarrod.acl@ednet.lancs.ac.uk
Website: www.gyfu.net/torte

Project Number: UK/00/B/F/LA/129_019
Project Title: Trans Europe Emergency Services Language Training
Promoter: Essex County Fire & Rescue Service
Contact person: Pat Jones
E-mail: pat.jones@essex-fire.gov.uk
Website: www.essex-fire.gov.uk

Project Number: UK/01/B/F/PP/129_355
Project Title: WEB-Based Information Technology Training
Promoter: Trades Union Congress
Contact person: Sean Bamford
E-mail: sbamford@tuc.org.uk
Website: www.tuc.org.uk

Annex 5

Issues to Consider when Gathering Information from Potential Project Partners

- What sort of organisation is the potential partner, e.g. SME, social partner, training organisation, accreditation body?
- What type of relevant knowledge, experience and skills can they bring to the partnership?
- What is their experience of transnational work, e.g. types and size of projects and their role?
- Do they seem genuinely committed to transnational work?
- Do you have common goals?
- What is the size and structure of the organisation and what staff resources can they offer? Do they have linguistic skills?
- Can they offer good dissemination networks locally, regionally, nationally and internationally?
- Geographical location (check transport links).
- Is this the type of organisation and are these the sort of people you would like to work with in the longer term?
- Do they have potential partners that they can recommend that could join the project?

Annex 6

Agenda Example

The example below is an agenda for a first transnational meeting as suggested by Kevin Osmond (Project Manager of ASILESP and Raising Horizons) who also recommends:

- Creating “opt-out” opportunities, especially at the beginning of the project
- Being open and honest from the beginning and start with a project partner meeting
- Planning a detailed agenda for your first meeting

Raising Horizons Inaugural Meeting
11.00 pm 23 January 2003
EASPD Office
Oudergemlaan/Avenue d’Auderghem 63, 1040 Brussels

AGENDA

1. Welcome and Introductions
2. Project Summary and Perceived Outcomes
3. Contracts and Budget
4. Administrative Arrangements – Record Keeping/Expenses
5. Work Programme Development
6. Publicity and Dissemination
7. Any Other Business
8. Date and Location for Next Meeting