ACTIVITY 2: RELEVANCE

Introduction

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Section Title Page: it can be useful to have a space to breathe between the different sections (and sub-sections) of the training.

Learning Outcome:
DEMONSTRATE improved understanding of the key factors involved in determining the relevance of a KA220 (or KA210) funding proposal and APPLY this in your future assessments

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Learning Outcome for A2-RELEVANCE: adapt this to reflect what you will actually deliver or address during your assessor training event.

Seven Slides in Seven Minutes

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This follows the concept of keeping things simple and promoting the use of active and peer learning approaches during the training session. Each of the core elements being judged under RELEVANCE is to be quickly introduced, highlighting key aspects but keeping the introduction short to allow for participants to go forward and work in groups.

Many policies and priorities (international, European, regional, national, institutional, sectoral and societal) but proposals must be relevant to **Erasmus+** and the **selected action**.

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This relates to the sub-criterion for "proposal is relevant to the objectives and priorities of the funding action". The idea is to acknowledge that other priorities exist at local, national and European levels but to remind assessors that the initial focus should be on whether or not the proposal is relevant to the objectives of the selected funding action (KA220 or KA210). It is also important for assessors to confirm that the proposal convincingly addresses at least one horizontal or sector-specific priority: where this is not the case, the proposal should be rated as Weak. In cases where a horizontal priority is selected, the proposal should additionally confirm relevance to the selected field. Where addressing the horizontal priority for inclusion and diversity, or one or more European Priorities in the National Context (as pre-announced by the National Agency), the proposal should be considered as highly relevant.

Everyday Activities

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This relates to the sub-criterion for "profile, experience and activities of the participating organisations are relevant to the field of application.". For this slide, it is important to acknowledge that we are moving slightly into the realm of QUALITY OF PARTNERSHIP but with a specific focus on the RELEVANCE of the listed partners to the selected field. In all cases, assessors need to look for evidence that the participating organisations have experience in the targeted field, or that experience from other fields will bring benefit to the project and the selected field - this goes beyond formal or nominal relevance and should be evident in the everyday activities of partner organisations and the expertise of their staff, especially within those actions not associated to the Erasmus+ programme.

Needs Analysis

The proposal proves that a solid analysis, drawing on existing knowledge, know-how and practice, has been carried out to identify needs of the target group(s) and organisations.

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This relates to the sub-criterion for "proposal is based on a genuine and adequate needs analysis". Here it can be useful to highlight that assessors often have different opinions on what represents a solid or convincing needs analysis, and that this is sometimes related to the field of operation for the proposal (e.g. higher expectations in some fields) and for the assessor (e.g. expectations aligned with assessor's own insights and experience).. In all cases, assessors must be convinced that some form of needs analysis has been carried out - drawing on existing knowledge, know-how and practice – and with a view to identifying the needs of specific (and named) target and beneficiary audiences. The nature, type and extent of past needs analysis activities should be described and it should be clear how the identified needs relate to the selected field and priorities. It is also important to underline that continuing consultation, mapping and analysis actions can also take place during the lifetime of a project, as long as the initial needs analysis is adequate and convincing and as long as needs analysis does not form the majority of the targeted actions.

Synergies

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This relates to the sub-criterion for "proposal is suitable for creating synergies between different fields of education/training/youth/sport or has potentially a strong impact on one or more of these fields". Under this slide, it is important to underline that synergies are a positive thing and should be acknowledged and rewarded but that a project that has a focus on a single field should not be penalized due to a lack of synergy with other fields.

The project is likely to produce results that will be innovative for its FIELD IN GENERAL, or for the GEOGRAPHICAL CONTEXT in which the project is implemented. The innovative dimension of a project can relate to the CONTENT OF THE OUTPUTS produced by the project, and/or to the PROCESSES AND WORKING METHODS applied, and/or to the ORGANISATIONS AND PERSONS INVOLVED or targeted.

Situational Innovation

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This relates to the sub-criterion for "proposal is innovative". Looking beyond the formal definition provided on the screen, it is important to highlight that innovation in Erasmus+ can be situational and can be as simple as offering or facilitating the development of knowledge and skills to new audiences. In all cases, innovation should be considered in relation to the experience, profile and existing capacities of the participating organisations and their targeted audiences, the latter especially important in the case of inclusion projects involving persons with fewer opportunities.

Forward Progression

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This relates to the sub-criterion for "proposal is complementary to other initiatives already carried out by the participating organisations". Here it is important to acknowledge that past projects are useful but to highlight the importance of knowing how past successes and achievements will be improved upon and further progressed in the future, and as part of the proposed project. As with the previous section (innovation; situational innovation), this might to new products or new languages but might also be tied to the involvement of new countries or new beneficiary audiences. In all cases, it should be clear in terms of access rights to existing products and resources, and the relationship between partners and the original developer.

European Added-Value

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This relates to the sub-criterion for "proposal brings added value at EU level through results that would not be attained by activities carried out in a single country". Under this slide, the first and most important aspect to consider is the additionality of transnational collaboration (i.e. what will emerge through transnational collaboration that would not be the same or greater value when working unilaterally or with partners from a single country). Beyond this, it can be useful to also additionally consider the value of the targeted activities and outputs at wider European level.

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Opportunity to mention the new sub-criterion for EU Values.

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Opportunity to clarify what is included under the heading of EU Values whilst also confirming how this might be addressed in a KA210 or KA220 funding proposal (i.e. minimum requirement for box ticking at the end of the proposal document but with additional detail able to be provided in other parts of the proposal… although no specific question exists on this topic).

KA220 Assessment Criteria: Relevance

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Extent to which…

- Proposal is relevant to the **OBJECTIVES** and **PRIORITIES** of the funding action. SSP
- Proposal is relevant for respect/promotion of EU values and fighting discrimination. SSP
- **PROFILE, EXPERIENCE and ACTIVITIES** of the participating organisations are relevant to the field of application. SSP
- Proposal is based on a genuine and adequate **NEEDS ANALYSIS.**
- Proposal is suitable for creating **SYNERGIES** between different fields of education, training, youth and sport or has potential for strong impact on one of these fields.
- Proposal is **INNOVATIVE.**
- Proposal is **COMPLEMENTARY** to other initiatives already carried out by the participating organisations.
- Proposal brings **ADDED VALUE AT EU LEVEL** through results that would not be attained by activities carried out in a single country. SSP

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This overview slide confirms those aspects which relate to KA220 (all listed elements) and those which relate to KA210 (labelled as SSP). It provides an opportunity to underline ambitions for engaging newcomers in KA210 and the need for proportional assessment.
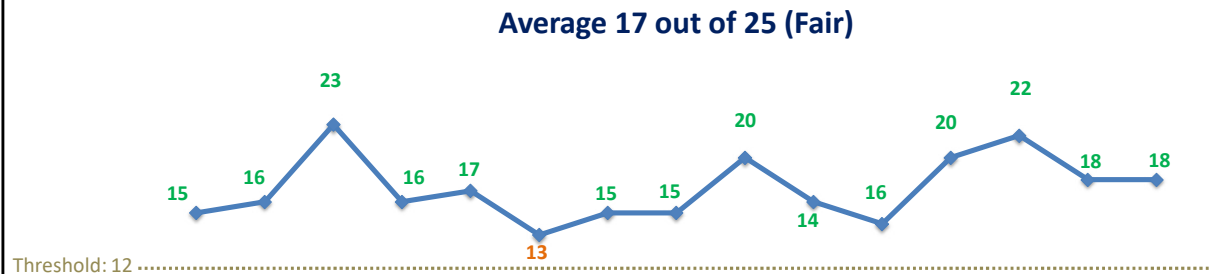
ACTIVITY 2: RELEVANCE

Field-based Groupwork

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Assessment Results - Relevance
ADULT EDUCATION (ADU)

Average 17 out of 25 (Fair)
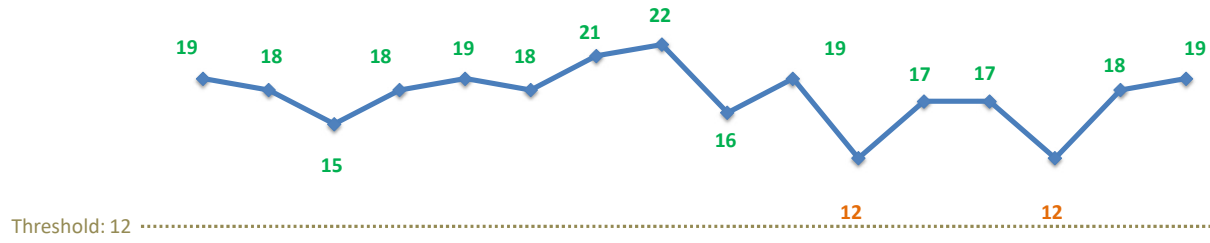
Threshold: 12

GUIDELINES FOR ERASMUS+ NAs

Scoring Example 1 (ADU): in cases where assessors are invited to undertake a mock assessment, scores should be submitted to a central contact point, in advance, to allow a simple chart or overview to be prepared in which the range or variety of scores is shown. It can be useful to position these above or below the funding threshold to show the consequence of scoring.

In cases where a large number of assessors are participating in KA2 assessor training then it can be useful to divide them according to the field that they will assess and to provide a field-specific proposal for mock assessment. In cases where a small number of assessors will participate, a single field might be selected as an example for all assessors to work on.

Note: the above chart is provided only as an example with a need, in all cases, to produce your own charts that include scoring data from your own assessors.

Assessment Results - Relevance
HIGHER EDUCATION (HED)

Average 18 out of 25 (Good)
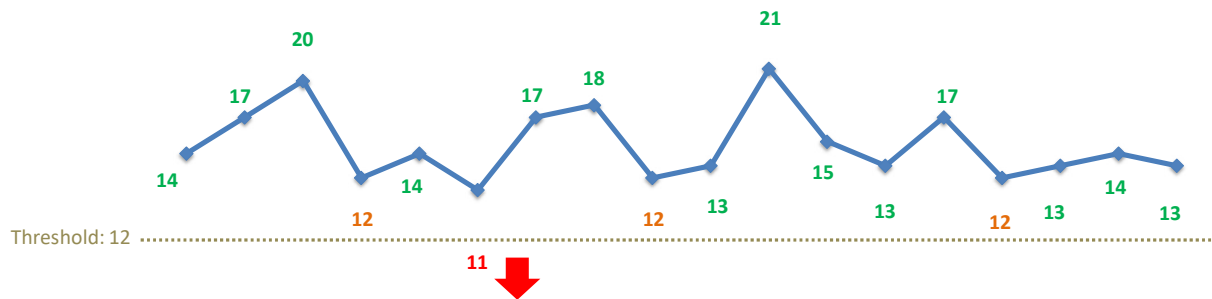
Threshold: 12

GUIDELINES FOR ERASMUS+ NAs

Scoring Example 2 (HED): in cases where assessors are invited to undertake a mock assessment, scores should be submitted to a central contact point, in advance, to allow a simple chart or overview to be prepared in which the range or variety of scores is shown. It can be useful to position these above or below the funding threshold to show the consequence of scoring.

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Assessment Results - Relevance
SCHOOL EDUCATION (SCH)

Average 15 out of 25 (Fair)

Threshold: 12

Scores shown: 14, 17, 20, 12, 14, 11, 17, 18, 12, 13, 21, 15, 13, 13, 17, 12, 13, 14, 13
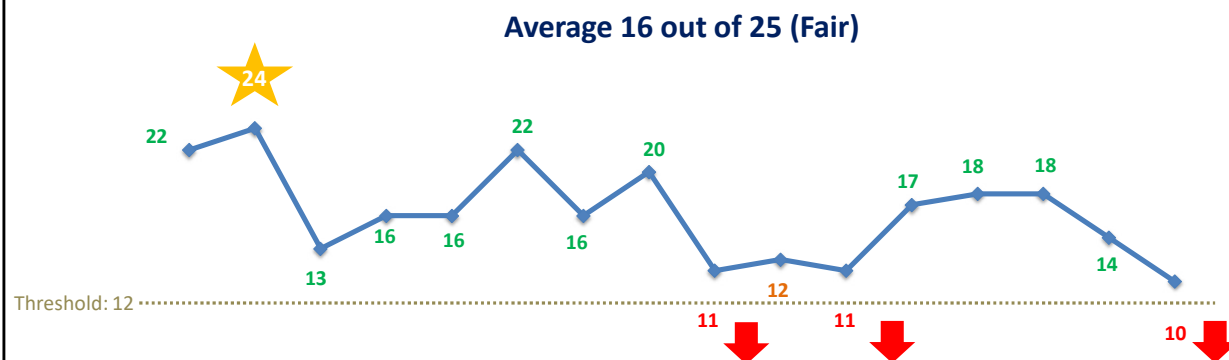
GUIDELINES FOR ERASMUS+ NAs

Scoring Example 3 (SCH): in cases where assessors are invited to undertake a mock assessment, scores should be submitted to a central contact point, in advance, to allow a simple chart or overview to be prepared in which the range or variety of scores is shown. It can be useful to position these above or below the funding threshold to show the consequence of scoring.

In cases where a large number of assessors are participating in KA2 assessor training then it can be useful to divide them according to the field that they will assess and to provide a field-specific proposal for mock assessment. In cases where a small number of assessors will participate, a single field might be selected as an example for all assessors to work on.

Note: the above chart is provided only as an example with a need, in all cases, to produce your own charts that include scoring data from your own assessors.

Assessment Results - Relevance
VOCATIONAL EDUCATION AND TRAINING (VET)

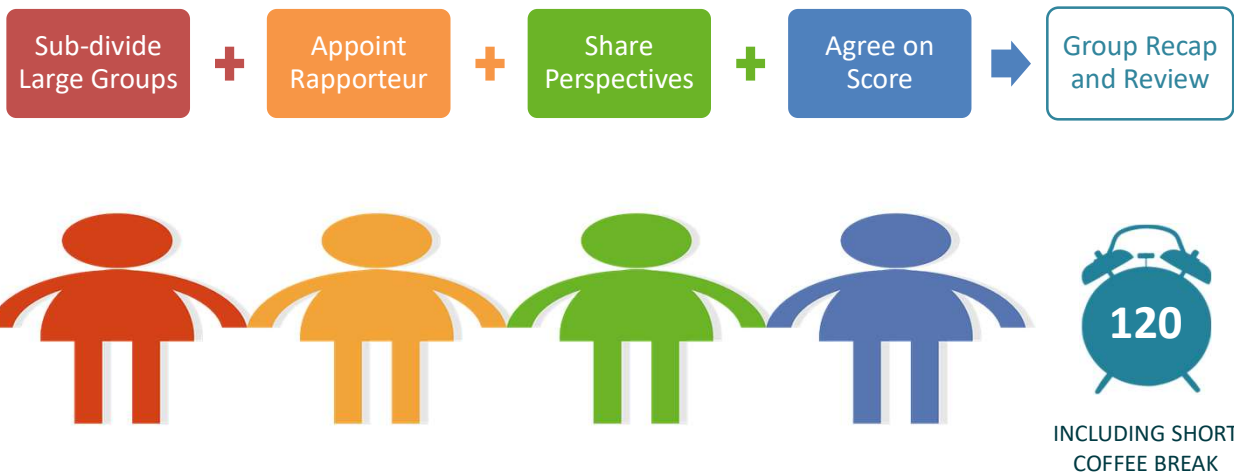Average 16 out of 25 (Fair)

Threshold: 12

GUIDELINES FOR ERASMUS+ NAs

Scoring Example 4 (VET): in cases where assessors are invited to undertake a mock assessment, scores should be submitted to a central contact point, in advance, to allow a simple chart or overview to be prepared in which the range or variety of scores is shown. It can be useful to position these above or below the funding threshold to show the consequence of scoring.

In cases where a large number of assessors are participating in KA2 assessor training then it can be useful to divide them according to the field that they will assess and to provide a field-specific proposal for mock assessment. In cases where a small number of assessors will participate, a single field might be selected as an example for all assessors to work on.

Note: the above chart is provided only as an example with a need, in all cases, to produce your own charts that include scoring data from your own assessors.

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After sharing scores in a plenary session, the next step is to encourage discussion on the proposal that was reviewed, either in field-based groups or as a whole group that has reviewed a single proposal. Depending on the number of assessors being trained, breakout rooms or spaces might be needed.

In STEP 1, larger groups should be sub-divided to facilitate discussion. In STEP 2, a rapporteur should be appointed to provide feedback in plenary. In STEP 3, each assessor should share their thoughts and perspectives on the project reviewed. In STEP 4, groups should try to agree on a single score for "RELEVANCE". In a FINAL STEP, the rapporteur should confirm key messages and a single score within the group, to ensure that all participants are in agreement before returning to plenary.

If working in a room or space where the group has been sub-divided, it can be useful to compare results across the different sub-groups before returning to plenary. The decision on whether or not to compare results across sub-groups will also depend on the time available, following initial discussions and scoring. In all cases, the timeclock should be updated to reflect your own schedule.

CLEAR ASSESSMENT Collaboration on the Levelling-up of Erasmus+ Assessors through developing and testing a common Resource set for KA2 Assessment

Assessor Notes: Please read the COOPERATION PARTNERSHIP application for your ALLOCATED FIELD and make some notes to help with discussion during the Training for Erasmus+ Assessors. These notes will not be submitted so use the language or style you prefer.

ASSESSMENT CRITERIA: RELEVANCE	STRENGTHS	WEAKNESSES
The extent to which the proposal is relevant for OBJECTIVES AND PRIORITIES of the Action: proposal is considered highly relevant if it addresses the priority for INCLUSION AND DIVERSITY.		
The extent to which the proposal is relevant for respect and promotion of shared EU values (human dignity, freedom, democracy, equality, rule of law, human rights) and fighting discrimination.		
The extent to which the profile, experience and activities of the PARTICIPATING ORGANISATIONS are relevant for the field of the application.		
The extent to which the proposal is based on a genuine and adequate NEEDS ANALYSIS.		
The extent to which the proposal is suitable for creating SYNERGIES between different fields of education, training, youth and sport or has potentially a strong impact on one or more of those fields.		
The extent to which the proposal is INNOVATIVE.		
The extent to which the proposal is complementary to other initiatives already carried out by the participating organisations.		
The extent to which the proposal brings added value at EU level through results that would not be attained by activities carried out in a single country.		
SCORE FOR RELEVANCE (OUT OF 25)		

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As a part of the homework exercise, it can be useful to provide a template for assessors to record their thoughts. This screen shows an example of such a template. It is important, however, to confirm that this template is for the mock assessment exercise only and does not relate to the formal assessment exercise where strengths and weaknesses would come together in a single set of comments.

Note: materials developed for the Spring 2023 Assessor Training events in Ljubljana and Rotterdam will be shared with Erasmus+ National Agencies.
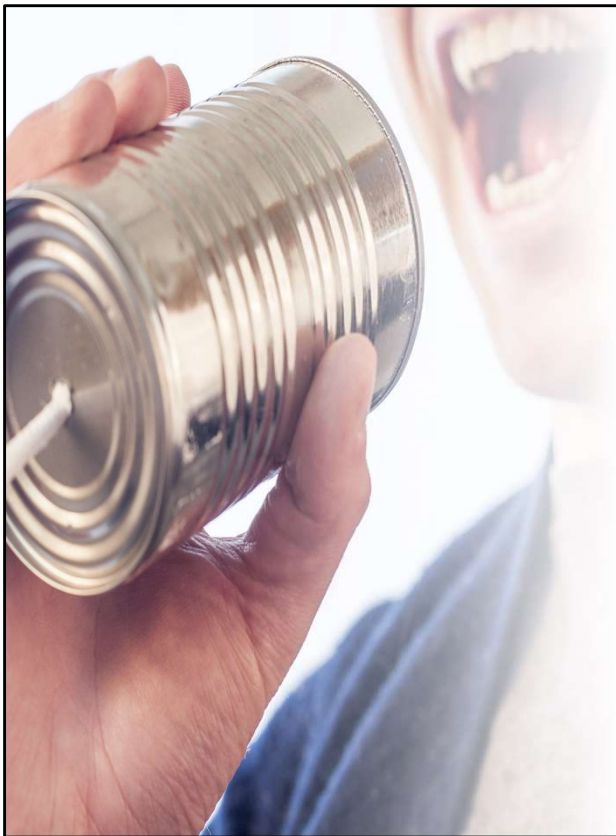
ACTIVITY 2: RELEVANCE

Plenary Exchange

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Plenary Exchange

1. Did you agree on a single score (as a whole group, or as two sub-groups)?

2. What method or approach did you adopt when sharing perspectives?

3. Where there any difficulties? Were some elements more complex than others?

RAPPORTEUR FEEDBACK 5

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This is a simple prompt for the plenary feedback session, providing a small number of questions against which the different groups (and sub-groups) will be invited to comment. Depending on the number of groups, and the time available, the time given to each rapporteur might need to be changed (usually 3 to 5 minutes per rapporteur).

Relevance Briefing Sheet

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In this final slide, it can be useful to remind assessors of the availability of a written briefing sheet which confirms the key elements being judged under "RELEVANCE".