

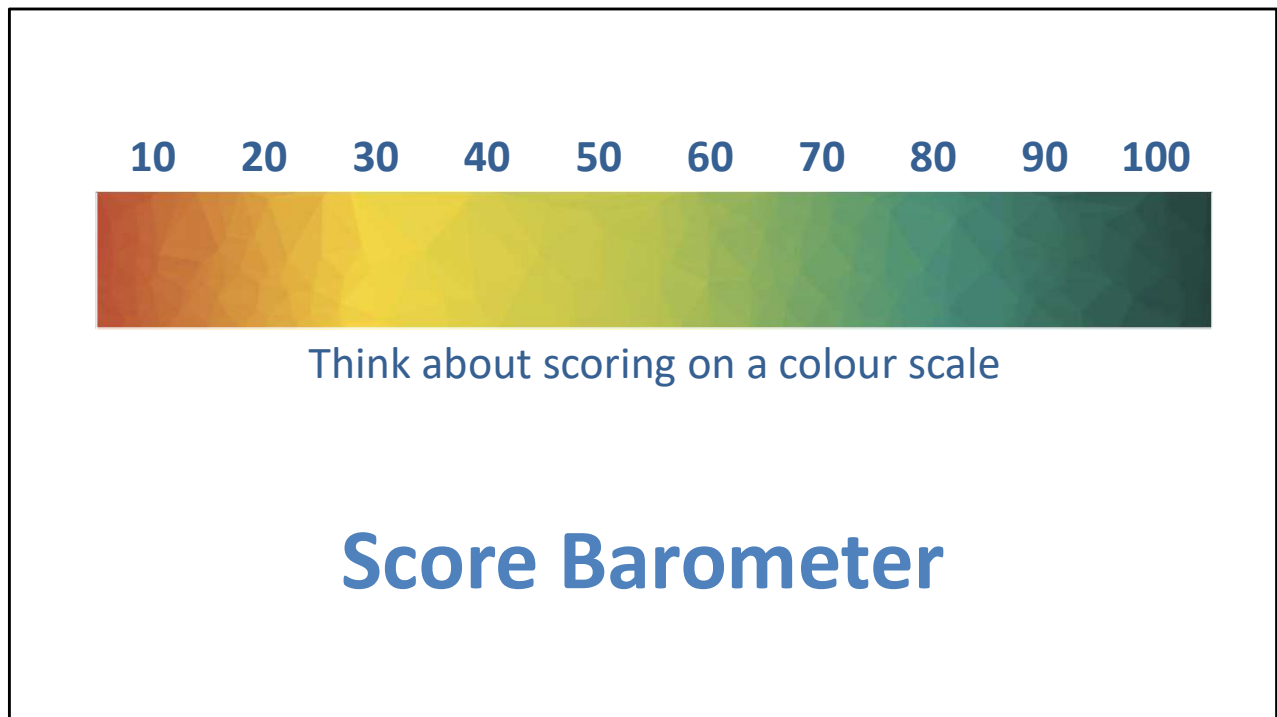
# ERASMUS+ KA220

# Scoring Practices and Consequences



GUIDELINES FOR ERASMUS+ NAs

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



### GUIDELINES FOR ERASMUS+ NAs

This scoring barometer shows the difference between Work Packages that are rated EXCELLENT or GOOD (Green: 70-100 points), BELOW EXPECTATION or INADEQUATE (Orange: 40-69 points) and WEAK (Red: below 40 points). It is important that groups of assessors have access to this barometer, either in digital or printed form, to support their discussions.



## Six Volunteers Needed

### GUIDELINES FOR ERASMUS+ NAs

A short but fun scoring exercise is held at the start of discussions on scoring, to highlight differences between individual assessors and scoring practices. This short scoring exercise is optional, but all remaining slides and financial scenarios are important to include in all KA220 assessor training events.

For the short scoring exercise, six volunteers are required.



**One Task:  
3 Minutes**



**One Task:  
100 Points**

#### GUIDELINES FOR ERASMUS+ NAs

For the short scoring exercise, when you have your six volunteers, it is important to outline the task, which begins by confirming that:

- [a] there are 3 ARTISTS who have a single 'artistic task' to complete in just 3 minutes.
- [b] there are 3 JUDGES who have a single scoring task to complete, scoring what they see out of 100 points in total.

In preparation for this exercise, you will need 3 flipcharts and sets of coloured flipchart markers (including green in all cases) so that the artists have a place to do their work.



# Instructions for Artists

**Your task is to draw a FROG using the tools that you have in front of you. You have THREE MINUTES to complete your artwork.**



**Your work will be judged for technical ability, use of colour; creativity and emotional value.**

## GUIDELINES FOR ERASMUS+ NAs

For the short scoring exercise, you should provide additional guidance for the 3 ARTISTS, according to the on-screen instructions. In all cases, technical ability, use of colour, creativity and emotional value are terms that are purposely vague and open to different interpretations by the 3 JUDGES.

# Instructions for Judges

Your task is to individually score the three artworks, as per the table below:

Assessment Criteria	Assessment Scores
Technical Ability	out of 25
Use of Colour	out of 25
Creativity	out of 25
Emotional Value	out of 25
TOTAL SCORE	out of 100



## GUIDELINES FOR ERASMUS+ NAs

For the short scoring exercise, you should provide additional guidance for the 3 JUDGES, according to the on-screen instructions. In all cases, technical ability, use of colour, creativity and emotional value are terms that are purposely vague and open to different interpretations by these JUDGES. To keep things exciting, you could also add a fixed time for the judges to do their work (for example, 3 minutes). In all cases, judges should be encouraged to visit and inspect the work of the artists.

# We Are All Different We All Need Guidance



## GUIDELINES FOR ERASMUS+ NAs

This slide serves as a useful reminder that assessors are not a single concept but humans with different professional lives and experiences that can influence their assessment perspectives. It also underlines the importance of having clear guidance on what we need to assess, and what exactly this comprises or should cover.

## Lump Sum Handbook: KA220 FR Assessment



Each work package is evaluated separately on the basis of the [listed] criteria and receives a separate score.

Overall project score is the weighted average of the scores for each WP.

For each WP, the percentage of the budget to be paid is calculated separately, based on WP scores and WP budget shares.

Project Management WP is not scored [2023]

### GUIDELINES FOR ERASMUS+ NAs

Quick overview of what is written in the (different) Erasmus+ Lump Sum Handbooks relating to KA220 final report assessment and scoring.



## Lump Sum Handbook: KA220 FR Assessment

Work Package	Budget Share	Tasks and Deliverables	Final Report Assessment: Activities, Outputs, Results, Indicators, Evidence	Assessment Score
WP2	25%	2.1 2.2	Lorem ipsum dolor sit amet, consectetur adipiscing elit...	50
WP3	25%	3.1 3.2	Lorem ipsum dolor sit amet, consectetur adipiscing elit...	80
WP4	30%	4.1 4.2	Lorem ipsum dolor sit amet, consectetur adipiscing elit...	70
TOTAL SCORE:				67

### GUIDELINES FOR ERASMUS+ NAs

An example of the how WEIGHTED AVERAGES are used in calculating the overall score: this is calculated as the score for each work package multiplied by the budget share (%) for that work package and then divided by the total budget share (%) of non-management related work packages... which is then rounded, in this instance, to 67.

# Lump Sum Handbook: KA220 FR Assessment



If overall project score is 70+ but score of one or more WPs is <70 then a grant reduction shall be applied only to those WPs with a low score.

Grant reductions cannot be cumulative:

- if project score is 70+ then reductions are only applied at level of individual WPs;
- if project score is <70 then reductions are only applied at level of overall project budget.

Exception is where a WHOLE activity is not delivered. In this case, deduct task first then apply reduction. This is not expected to be a regular occurrence and will form part of budget comments to NA: do not punish twice (i.e. budget reduction for non-delivered task plus reduced WP score)

## GUIDELINES FOR ERASMUS+ NAs

Quick overview of what is written in the (different) Erasmus+ Lump Sum Handbooks relating to KA220 final report assessment, and the consequences of scoring above or below 70 points.

It is also mentioned here that where a WHOLE project activity has not been delivered, with no valid explanation as to why this happened or what other activities took place instead, experts should recommend to the NA that all associated costs are deducted in full. Of course, this can only happen where an activity has been costed separately in the work programme. Where an activity is not costed separately, any reduction in the range and extent of activities should be reflected in individual work package scores.

## KA220 Assessment Scores and Consequences

At the PROPOSAL stage and FINAL REPORT (FR) stage, assessments are scored out of 100.

During FR assessment, there are financial consequences for KA220 projects scoring less than 70 points overall.

Differences exist in low-score categories depending on which version of the Lump Sum Handbook you read.

	NOT DELIVERED	WEAK	INADEQUATE	BELOW EXPECTATION	GOOD OR EXCELLENT
<b>Scoring Categories and Definitions</b>	Planned activities and/or outputs not delivered.	Few activities or outputs delivered and general lack of quality overall.	Activities partially delivered; lack of expected quality.	Activities not fully delivered or not consistent with initial planning; no convincing rationale for change.	Activities rated good to excellent with results worthy of wider promotion
<b>Scoring Range</b>	0-9 points	10-39 points	40-54 points	55-69 points	70-100 points
<b>Consequence</b>	0% Grant Paid	30% Grant Paid	60% Grant Paid	90% Grant Paid	100% Grant Paid

## GUIDELINES FOR ERASMUS+ NAs

Moving beyond the scoring barometer (which was a useful tool for content-based and achievement-based discussions), it is important to clearly define the five scoring bands for NOT DELIVERED (0-9 points), WEAK (10-39 points), INADEQUATE (40-54 points), BELOW EXPECTATION (55-69 points) and GOOD OR EXCELLENT (70-100 points), building on the information presented in the (various) Lump Sum Handbooks.

As well as introducing the five scoring bands, it is important to underline the consequences of scoring below

70 and to promote the idea that “70 is the new baseline” for projects that have delivered all that was planned. In all cases, it should be underlined that a score below 70 should be used EXCEPTIONALLY and only in cases where activities are not delivered in full, or to the anticipated quality or extent, and where there is no convincing rationale for change or deviation.

# Assessment, Scores and Reductions

## 3 Options to Reduce and 7 Test Scenarios



### GUIDELINES FOR ERASMUS+ NAs

In this slide, we introduce the three categories of reduction (RED1 / RED2 / RED3) before reflecting on a series of 7 budgetary scenarios that might emerge during final report assessment.

RED1: full reduction of activity costs is recommended by the assessor - under comments to the NA - reflecting a scenario where a WHOLE ACTIVITY, that is separately listed and costed within a single WP, has not been delivered.

RED2: % reduction will be applied on the basis of the score that is given to a single work package.

RED3: % reduction will be applied on the basis of the overall score that is calculated by the online assessment tool.

In all cases, and to avoid double punishment, if a RED3 % reduction is applied at overall project level, RED2 % reductions are not additionally applied at WP level. However, there can be overlap between RED1 (activity reductions are always applied first) and either RED2 or RED3 (% reductions are always applied second).

## Assessment, Scores and Reductions: Scenario 1

				WP SCORES	FINAL SCORE	
RED3 % Reduction of WP Costs	WORK PACKAGE	WP COST	BUDGET SHARE	TASKS	80	83
	WP1	49,000	19.60%	Project Management		
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline		
				Development of Digital Learning Programme for Adult Educators		
Development of Digital Learning Templates and Resources						
Transnational Partner Meeting 1						
WP3	42,000	16.80%	User Testing and Validation 1: Training of Trainers	90		
			User Testing and Validation 2: Rollout and Learner Engagement			
			Transnational Partner Meeting 2			
WP4	37,000	14.80%	Digital Platform Development	85		
			Digital Badging Options and Criteria			
			Digital Pact Creation and Operationalisation of Badges and Pact			
			Transnational Partner Meeting 3			
WP5	44,000	17.60%	Intra-project Communication Strategy and Steps	80		
			Post-project Dissemination and Sustainability Strategy and Steps			
			Multiplier Workshops			
LUMP SUM		250,000	100.00%			

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present Scenario 1 and ask participants to comment on which reductions would apply in this case.

## Assessment, Scores and Reductions: Scenario 1

WORK PACKAGE					WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management				80	83
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline					
				Development of Digital Learning Programme for Adult Educators					
				Development of Digital Learning Templates and Resources					
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	Transnational Partner Meeting 1					
				User Testing and Validation 1: Training of Trainers					
				User Testing and Validation 2: Rollout and Learner Engagement					
	RED1 Full Reduction of Activity Costs	WP4	37,000	14.80%	Transnational Partner Meeting 2				
Digital Platform Development									
Digital Badging Options and Criteria									
WP5		44,000	17.60%	Digital Pact Creation and Operationalisation of Badges and Pact					
	Transnational Partner Meeting 3								
	Intra-project Communication Strategy and Steps								
				Post-project Dissemination and Sustainability Strategy and Steps					
				Multiplier Workshops					
LUMP SUM		250,000	100.00%	NO REDUCTIONS APPLIED				FINAL SUM	250,000

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present the results for Scenario 1, where it is confirmed that NO REDUCTIONS will apply. All scores are over 70 and no WHOLE ACTIVITY is highlighted as not being delivered.

## Assessment, Scores and Reductions: Scenario 2

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			67	68
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	Transnational Partner Meeting 1				
				User Testing and Validation 1: Training of Trainers				
				User Testing and Validation 2: Rollout and Learner Engagement				
	RED1 Full Reduction of Activity Costs	WP4	37,000	14.80%	Transnational Partner Meeting 2			
Digital Platform Development								
Digital Badging Options and Criteria								
WP5		44,000	17.60%	Digital Pact Creation and Operationalisation of Badges and Pact				
	Transnational Partner Meeting 3							
	Intra-project Communication Strategy and Steps							
				Post-project Dissemination and Sustainability Strategy and Steps				
				Multiplier Workshops				
LUMP SUM		250,000	100.00%					

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present Scenario 2 and ask participants to comment on which reductions would apply in this case.



## Assessment, Scores and Reductions: Scenario 2

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			67	68
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	Transnational Partner Meeting 1				
				User Testing and Validation 1: Training of Trainers				
				User Testing and Validation 2: Rollout and Learner Engagement				
	RED1 Full Reduction of Activity Costs	WP4	37,000	14.80%	Transnational Partner Meeting 2			
Digital Platform Development								
Digital Badging Options and Criteria								
WP5		44,000	17.60%	Digital Pact Creation and Operationalisation of Badges and Pact				
	Transnational Partner Meeting 3							
	Intra-project Communication Strategy and Steps							
						Post-project Dissemination and Sustainability Strategy and Steps		
						Multiplier Workshops		
LUMP SUM		250,000	100.00%	RED2 ONLY: OVERALL REDUCTION OF 10%			FINAL SUM	225,000

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present the results for Scenario 2, where it is confirmed that RED2 reductions will apply: an overall score of 68 means that a 10% reduction is applied to the original lump sum (reduction of €25,000 which represents 10% of €250,000).

Note: whilst WP2, WP3 and WP4 are all scored below 70, RED3 reductions are not applied at WP level, due to RED2 reductions having already being applied at project level.

## Assessment, Scores and Reductions: Scenario 3

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			60	82
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
WP3	42,000	16.80%	Transnational Partner Meeting 1					
			User Testing and Validation 1: Training of Trainers					
			User Testing and Validation 2: Rollout and Learner Engagement					
WP4	37,000	14.80%	Transnational Partner Meeting 2					
			Digital Platform Development					
			Digital Badging Options and Criteria					
WP5	44,000	17.60%	Digital Pact Creation and Operationalisation of Badges and Pact					
			Transnational Partner Meeting 3					
			Intra-project Communication Strategy and Steps					
RED2 % Reduction of Overall Costs	WP6	51,000	20.40%	Post-project Dissemination and Sustainability Strategy and Steps				
				Multiplier Workshops				
				LUMP SUM				
RED1 Full Reduction of Activity Costs	LUMP SUM		250,000	100.00%	LUMP SUM			

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present Scenario 3 and ask participants to comment on which reductions would apply in this case.

## Assessment, Scores and Reductions: Scenario 3

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			60	82
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
WP3	42,000	16.80%	Transnational Partner Meeting 1					
			User Testing and Validation 1: Training of Trainers					
			User Testing and Validation 2: Rollout and Learner Engagement					
WP4	37,000	14.80%	Transnational Partner Meeting 2					
			Digital Platform Development					
			Digital Badging Options and Criteria					
WP5	44,000	17.60%	Digital Pact Creation and Operationalisation of Badges and Pact					
			Transnational Partner Meeting 3					
			Intra-project Communication Strategy and Steps					
RED1 Full Reduction of Activity Costs	WP5	44,000	17.60%	Post-project Dissemination and Sustainability Strategy and Steps				
				Multiplier Workshops				
LUMP SUM		250,000	100.00%	RED3 ONLY: REDUCTION OF 10% TO WP2			FINAL SUM	242,200

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present the results for Scenario 3, where it is confirmed that RED3 reductions will apply: a score of 60 in WP2 means that a 10% reduction is applied to the overall value of this work package (reduction of €7,800 which represents 10% of €78,000).

## Assessment, Scores and Reductions: Scenario 4

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			70	86
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
			Transnational Partner Meeting 1					
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	User Testing and Validation 1: Training of Trainers			95	
				User Testing and Validation 2: Rollout and Learner Engagement				
				Transnational Partner Meeting 2: Originally Costed at €7,500				
RED1 Full Reduction of Activity Costs	WP4	37,000	14.80%	Digital Platform Development			100	
				Digital Badging Options and Criteria				
				Digital Pact Creation and Operationalisation of Badges and Pact				
				Transnational Partner Meeting 3				
	WP5	44,000	17.60%	Intra-project Communication Strategy and Steps			95	
Post-project Dissemination and Sustainability Strategy and Steps								
Multiplier Workshops								
LUMP SUM		250,000	100.00%					

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present Scenario 4 and ask participants to comment on which reductions would apply in this case. It is important to highlight at this point that the entry highlighted in red reflects the fact that this WHOLE ACTIVITY was not delivered.

**RED3**  
% Reduction  
of WP Costs

RED3

% Reduction  
of WP Costs

**RED2**  
% Reduction  
of Overall Costs

RED2

**% Reduction  
of Overall Costs**

**RED1**  
Full Reduction of  
Activity Costs

RED1

### Activity Costs

## GUIDELINES FOR ERASMUS+ NAs

In this slide, we present the results for Scenario 4, where it is confirmed that RED1 reductions will apply, reflecting the fact that this WHOLE ACTIVITY was not delivered (reduction of €7,500). No additional percentage-based reductions are applied in this case.

## Assessment, Scores and Reductions: Scenario 5

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			60	82
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	Transnational Partner Meeting 1				
				User Testing and Validation 1: Training of Trainers				
				User Testing and Validation 2: Rollout and Learner Engagement				
	RED1 Full Reduction of Activity Costs	WP4	37,000	14.80%	Transnational Partner Meeting 2: Originally Costed at €7,500			
Digital Platform Development								
Digital Badging Options and Criteria								
Digital Pact Creation and Operationalisation of Badges and Pact								
RED1 Full Reduction of Activity Costs	WP5	44,000	17.60%	Transnational Partner Meeting 3				
				Intra-project Communication Strategy and Steps				
				Post-project Dissemination and Sustainability Strategy and Steps				
	LUMP SUM			250,000	100.00%	Multiplier Workshops		

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present Scenario 5 and ask participants to comment on which reductions would apply in this case. It is important to highlight at this point that the entry highlighted in red reflects the fact that this WHOLE ACTIVITY was not delivered.

## Assessment, Scores and Reductions: Scenario 5

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			60	82
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	Transnational Partner Meeting 1				
				User Testing and Validation 1: Training of Trainers				
				User Testing and Validation 2: Rollout and Learner Engagement				
	RED1 Full Reduction of Activity Costs	WP4	37,000	14.80%	Transnational Partner Meeting 2: Originally Costed at €7,500			
Digital Platform Development								
Digital Badging Options and Criteria								
Digital Pact Creation and Operationalisation of Badges and Pact								
RED1 Full Reduction of Activity Costs	WP5	44,000	17.60%	Transnational Partner Meeting 3				
				Intra-project Communication Strategy and Steps				
				Post-project Dissemination and Sustainability Strategy and Steps				
							Multiplier Workshops	
LUMP SUM		250,000	100.00%	RED1 AND RED3: MULTIPLE REDUCTIONS			FINAL SUM	234,700

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present the results for Scenario 5, where it is confirmed that MULTIPLE REDUCTIONS will apply.

Firstly, RED1 reductions are applied, reflecting the fact that a WHOLE ACTIVITY was not delivered (reduction of €7,500).

Secondly, RED3 reductions are applied: a score of 60 in WP2 requires a 10% reduction to the overall value of this work package (additional reduction of €7,800 which represents 10% of the original WP value of €78,000).

## Assessment, Scores and Reductions: Scenario 6

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE	
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			67	68	
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline					
				Development of Digital Learning Programme for Adult Educators					
				Development of Digital Learning Templates and Resources					
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	Transnational Partner Meeting 1					
				User Testing and Validation 1: Training of Trainers					
				User Testing and Validation 2: Rollout and Learner Engagement					
	RED1 Full Reduction of Activity Costs	Transnational Partner Meeting 2: Originally Costed at €7,500			69	70			
WP4		37,000	14.80%	Digital Platform Development					
				Digital Badging Options and Criteria					
				Digital Pact Creation and Operationalisation of Badges and Pact					
WP5		44,000	17.60%	Transnational Partner Meeting 3					
	Intra-project Communication Strategy and Steps								
	Post-project Dissemination and Sustainability Strategy and Steps								
LUMP SUM		250,000	100.00%	Multiplier Workshops					

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present Scenario 6 and ask participants to comment on which reductions would apply in this case. It is important to highlight at this point that the entry highlighted in red reflects the fact that this WHOLE ACTIVITY was not delivered.



## Assessment, Scores and Reductions: Scenario 6

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			67	68
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
WP3	42,000	16.80%	Transnational Partner Meeting 1					
			User Testing and Validation 1: Training of Trainers					
			User Testing and Validation 2: Rollout and Learner Engagement					
			Transnational Partner Meeting 2: Originally Costed at €7,500					
RED2 % Reduction of Overall Costs	WP4	37,000	14.80%	Digital Platform Development			69	
				Digital Badging Options and Criteria				
				Digital Pact Creation and Operationalisation of Badges and Pact				
				Transnational Partner Meeting 3				
RED1 Full Reduction of Activity Costs	WP5	44,000	17.60%	Intra-project Communication Strategy and Steps			70	
				Post-project Dissemination and Sustainability Strategy and Steps				
				Multiplier Workshops				
LUMP SUM		250,000	100.00%	RED1 AND RED2: MULTIPLE REDUCTIONS			FINAL SUM	218,250

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present the results for Scenario 6, where it is confirmed that MULTIPLE REDUCTIONS will apply.

Firstly, RED1 reductions are applied, reflecting the fact that a WHOLE ACTIVITY was not delivered (reduction of €7,500).

Secondly, RED2 reductions are applied: an overall score of 68 means that a 10% reduction is applied to the original lump sum (additional reduction of €24,250 which represents 10% of the remaining value of €242,500 once RED1 reductions have been applied).

Note: whilst WP2, WP3 and WP4 are all scored below 70, RED3 reductions are not applied (at WP level) due to RED2 reductions having already being applied (at project level).

## Assessment, Scores and Reductions: Scenario 7

					WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WORK PACKAGE	WP COST	BUDGET SHARE	TASKS	61	69
	WP1	49,000	19.60%	Project Management		
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline		
				Development of Digital Learning Programme for Adult Educators		
Development of Digital Learning Templates and Resources						
WP3	42,000	16.80%	Transnational Partner Meeting 1			
			User Testing and Validation 1: Training of Trainers			
			User Testing and Validation 2: Rollout and Learner Engagement			
WP4	37,000	14.80%	Transnational Partner Meeting 2			
			Digital Platform Development			
			Digital Badging Options and Criteria			
WP5	44,000	17.60%	Digital Pact Creation and Operationalisation of Badges and Pact			
			Transnational Partner Meeting 3			
			Intra-project Communication Strategy and Steps			
				Post-project Dissemination and Sustainability Strategy and Steps		
				90	Multiplier Workshops	
LUMP SUM		250,000	100.00%			

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present Scenario 7 and ask participants to comment on which reductions would apply in this case.

## Assessment, Scores and Reductions: Scenario 7

WORK PACKAGE				WP COST	BUDGET SHARE	TASKS	WP SCORES	FINAL SCORE
RED3 % Reduction of WP Costs	WP1	49,000	19.60%	Project Management			61	69
	WP2	78,000	31.20%	Co-creation of Curriculum and Programme Outline				
				Development of Digital Learning Programme for Adult Educators				
				Development of Digital Learning Templates and Resources				
RED2 % Reduction of Overall Costs	WP3	42,000	16.80%	Transnational Partner Meeting 1				
				User Testing and Validation 1: Training of Trainers				
				User Testing and Validation 2: Rollout and Learner Engagement				
	RED1 Full Reduction of Activity Costs	WP4	37,000	14.80%	Transnational Partner Meeting 2			
Digital Platform Development								
Digital Badging Options and Criteria								
WP5		44,000	17.60%	Digital Pact Creation and Operationalisation of Badges and Pact				
	Transnational Partner Meeting 3							
	Intra-project Communication Strategy and Steps							
						Post-project Dissemination and Sustainability Strategy and Steps		
						Multiplier Workshops		
LUMP SUM		250,000	100.00%	RED2 ONLY: OVERALL 10% REDUCTION = PUNISH ONCE			FINAL SUM	225,000

### GUIDELINES FOR ERASMUS+ NAs

In this slide, we present the results for Scenario 7, where it is confirmed that RED2 reductions will apply: an overall score of 68 means that a 10% reduction is applied to the original lump sum (reduction of €25,000 which represents 10% of €250,000).

Note: whilst WP2 and WP3 are scored below 70, RED3 reductions are not applied at WP level, due to RED2 reductions having already being applied at project level.

# Why Does It Matter?

- assessors review the final report [now in pairs] and make important scoring decisions
- assessors need to make sure that they do not to punish the same thing twice: a zero-return for an activity does not need to impact the WP score.
- NA-COM need to effectively manage public funds but maintain Erasmus+ programme reputation: unmanageable risks might become a deterrent for applicants, especially in smaller organisations.



## GUIDELINES FOR ERASMUS+ NAs

Final slide in this session, which provides an opportunity to highlight the importance of quality assessment at the final report stage, confirming this as an essential factor which helps to determine the value of the final lump sum.

This also provides an opportunity to highlight to assessors that the non-delivery of a whole activity might not be significant and might there not be important or significant when applying the WP score. **In such cases, work package scoring should consider the overall extent and quality of work package delivery, and the significance of any changes, whilst taking into account the explanations provided by the beneficiary in their final report**

Finally, it is important to underline the need to balance effective financial management (as per the mandate of the European Commission and the network of NAs) whilst ensuring that the Erasmus+ programme is open, transparent and not presenting financial risks that might become a deterrent for smaller organisations to participate in these types of projects.

# KA220 FR Assessment Briefing Sheets

In this briefing sheet, additional detail is given in terms of the **key aspects** that need to be considered when assessing a final report for an Erasmus+ Cooperation Partnership (KA220).

Criteria:	What to consider:
✔ WP1: Project Management	<p>As per the agreement signed with the beneficiary, remaining work packages should be assessed according to how they meet following quality criteria, either individually or as a whole, depending on that which was originally planned:</p> <ul style="list-style-type: none"> <li>✔ extent to which the project was implemented in line with the approved grant application, also taking into account any formal amendments that were agreed during the lifetime of the project;</li> <li>✔ adequacy and sufficiency of partner cooperation and communication activities;</li> <li>✔ adequacy and sufficiency of risk management and conflict resolution measures (where evident);</li> <li>✔ extent to which Erasmus+ online platforms were used.</li> </ul>
✔ WP2 et al.	<p>As per the agreement signed with the beneficiary, remaining work packages should be assessed according to how they meet following quality criteria, either individually or as a whole, depending on that which was originally planned:</p> <ul style="list-style-type: none"> <li>✔ extent to which the project was implemented in line with the approved grant application, taking into account any formal amendments that were agreed during the lifetime of the project;</li> <li>✔ quality of activities as a means of delivering under project goals and objectives;</li> <li>✔ quality of products and results and the extent to which final deliverables align with the original commitment and meet the needs of identified users and beneficiaries;</li> <li>✔ nature and extent of learning outcomes and impact for one or more beneficiary audiences;</li> <li>✔ extent to which activities and outputs are shown to be innovative and/or complementary to other actions and initiatives;</li> <li>✔ extent to which project activities, outputs or outcomes demonstrate added value at EU level;</li> <li>✔ extent to which quality assurance and evaluation measures were effectively implemented;</li> <li>✔ scope, extent and quality of dissemination activities undertaken;</li> <li>✔ extent to which there is recognizable or demonstrated impact on the participating organisations;</li> <li>✔ extent to which there is recognizable or demonstrated impact on other individuals/organisations.</li> </ul>

This briefing sheet considers feedback provided during the CLEAR Assessment pilot training event (Leuven, June 2024) as well as guidance and information provided in the Handbooks on the Long-Term Funding Model for Key Action 2.

EUROPEAN UNION

**Key Action 2:**  
 Cooperation Partnerships (KA220)  
 Final Report Assessment

**Assessment Criteria and What to Consider**  
 Briefing Sheet

Erasmus+  
 Empowering people, creating growth

In this briefing sheet, we consider those parts of the **final report form** that need to be considered when assessing a KA220 Cooperation Partnership, irrespective of the field of operation.

Section of the Final Report Form:	Core Content:	WP1: PROJECT MANAGEMENT	WP2: OUTCOMES
Context	Applicant Organisation-OD-Project Code-Project Title- Action Type-Call-Field Start and End Dates-Grant Awarded-M4- Language of the Form.	<input type="checkbox"/>	<input type="checkbox"/>
Project Summary	Background (why did you apply, what were the needs you addressed); Objectives (what did you want to achieve); Implementation (what activities did you implement); Results (what were the concrete outputs and results).	<input type="checkbox"/>	<input type="checkbox"/>
Project Description	Priorities and Topics Addressed (contributions, developments); Project Outcomes and Achievement of Objectives (and any developments); Innovation and Complementarity; Target Groups Needs Addressed; Benefits of Transnational Cooperation.	<input type="checkbox"/>	<input type="checkbox"/>
Participating Organisations	Participating Organisations (pre-filled data); Associated Partners (name; country; involvement and contributions).	<input type="checkbox"/>	<input type="checkbox"/>
WP1: Project Management	Management and Partner Contributions; Time Management; Communication and Cooperation (and areas for improvement); Difficulties, Risks and Conflicts Resolution; Use of Erasmus+ Online Platforms; Satisfaction with WP (self-rating from 1-50 plus supporting comments).	<input type="checkbox"/>	<input type="checkbox"/>
Overview of Remaining WPs	Pre-filled WP data (WP1; lead organisation; version; start/end dates; duration; grant); Project ramp down.	<input type="checkbox"/>	<input type="checkbox"/>
Work Package 2 et al.	WP and Partner Contributions; Differences (planning versus implementation); Planned Results (pre-filled data); Achievement of Results; Supporting Documents; Target Groups and Benefits; Indicators (achievement level); Progress/Quality/Achievement Measures; Satisfaction with WP (self-rating from 1-50 plus supporting comments).	<input type="checkbox"/>	<input type="checkbox"/>
Participants' Recognition	Use of European Recognition Instruments (yes/no; list of instruments used).	<input type="checkbox"/>	<input type="checkbox"/>
Follow-up	Impact (multiple audiences and levels); Dissemination and Use of Project Results (audiences; activities; open access arrangements; exploitation potential); Satisfaction with dissemination (self-rating from 1-50 plus supporting comments); Sustainability (activities and results that will be maintained); activities; financing).	<input type="checkbox"/>	<input type="checkbox"/>
Annexes	Declaration on Honour; Related Outputs and Deliverables.	<input type="checkbox"/>	<input type="checkbox"/>

Note: a final section is included at the end of the final report form for beneficiaries looking to apply for the European Language Label; these additional questions and responses should not be considered during KA220 final report assessment.

EUROPEAN UNION

**Key Action 2:**  
 Cooperation Partnerships (KA220)  
 Final Report Assessment

**WHERE TO LOOK**  
 Assessment Criteria Briefing Sheet

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## GUIDELINES FOR ERASMUS+ NAs

This final slide can be useful to remind assessors of the availability of dedicated briefing sheets for individuals delivering final report assessments for KA220 projects (2022 onwards).