**External Evaluation**

**1 Terms of reference and role of the external evaluator**The following terms of reference define this role. In carrying out this work it is essential that the external evaluator takes a detached standpoint but that this does prevent him from making practical suggestions from time to time:

1. To act as an external monitor of the evaluation processes already embedded in the project structure and suggest any additional tools, indicators and opportunities for evaluation. To liaise with both the co-ordinator and the project partner responsible for internal evaluation
2. To gain an overview of the project by first becoming familiar with the project bid and subsequently by receiving all project bulletins, other information and evaluation results.
3. To attend **at least** one meeting of the project partners (provisionally May 2016 in London) and to use this occasion to agree exact reporting formats.
4. To use all the evaluative information available at the time to produce interim comments on the performance of the project plus recommendations for the remaining contractual period to be included in the progress report.
5. To use all the evaluative information available by the end of the project to produce a final report on the performance of the project to be included in the final report.

**2 Budget**

The total budget for external evaluation is €2,500. This sum is intended to cover travel and subsistence costs for the external evaluator (estimated at €400). The remainder will reimburse the time of the external evaluator (estimated at 8 days). The external evaluator will be expected to enter into a sub-contact. Fee be paid on receipt of an invoice at the end of the project.

**3 Objectives and scope of the evaluation**

The project aims to demonstrate and evaluate the impact of its work at several levels and with a number of different target groups:

- Teacher educators in the three universities

- Experienced teachers in the three pilot schools

- Trainee and newly qualified teachers in the partner regions

- Teachers who download the materials from the website but are not officially enlisted in the project

The target groups will be exposed to the training materials (the intellectual outputs) which comprise six training modules each with a different Health and Well Being focus. This exposure will take place through:

- Multiplier Events in UK, Greece and Spain each focussed on two modules  
- One Learning, Teaching and Training event at the end of the project in Spain  
- The project website

Evaluative objectives will be delivered through the application of a number of surveys and evaluative tools which will enable data to be captured from the various target groups. This flow of data should inform interim and final Evaluation Reports. Following work by the internal evaluator some tools for self-evaluation are already in place alongside Quality Assurance guidelines:

- For self-evaluation of the first (and subsequent) project meetings  
- For self-evaluation of Work Package tasks by WP leaders  
  
The project now needs to consider additional tools firstly aimed at systematic benchmarking of the target groups and secondly designed to assess impact which can be directly attributed to the activities of the project and can be measured against agreed quality indicators (evaluation criteria).

**4 The baseline environment**

The evaluation plans both internal and external are predicated on the wider structure of the project but there are also a number of other factors concerning the environments in which the project will operate that need to be taken into account prior to the implementation of any evaluative activities:

1. **Interviews with co-ordinator and relevant partners** - to verify the quality indicators proposed for the main target groups in the evaluation map, suggest any additional indicators and investigate and mitigate barriers and problems that can be foreseen in the proposed evaluation processes.
2. **Baseline assessments** of the individual schools and teachers taking part in the planned pilot sessions leading to an awareness of the variables they introduce into the project. Variables to be taken into account should include both barriers and drivers for change (in terms of Pupil Health and Well-Being).
3. **Initial survey of staff in partner schools and teacher trainers in partner universities** to assess current thinking around Pupil Health and Well-Being and to detect any drivers or barriers to change.

**5 Evaluation map**

The following table aims to summarise the evaluative programme during the life of the project. It also takes into account some of the baseline data that needs to be gathered early in the contractual period or immediately before specific events. The main target groups have been estimated as follows, the numbers involved and the potential volume of data suggests that for practicality the project should employ some wide ranging quantitative evaluation alongside qualitative methods:

- 260 trainee teachers for each project year, 520 in total  
- 60 practising teachers attending Multiplier Events  
- 24 practising teachers attending the final training event  
- 6 local government advisers

Other target groups where evaluation might be subject to more challenges include an estimated 2000 pupils benefitting from the new learning and pedagogy of their student teachers and a further 60 trainee teachers supported by Erasmus mobility grants. Citations and peer reviews of the six proposed academic papers should also be considered as part of the evaluative outcomes of the project.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Element** | **Project  Management** | **Partner meetings and performance** | **Training modules** | **Multiplier events** | **Training event** | **Practical applications in schools** | **Dissemination, outputs and deliverables** | **Exploitation of results and mainstreaming** | **Transnational elements and added value** |
| **Months or frequency** | **Throughout project** | **Months: 3, 8, 14, 22** | **Upon completion** | **Months: ?** | **Month 22** | **Months: 12 - 24** | **Throughout project** | **Month 12 onwards** | **Throughout  project** |
| **Summary:**  **Evaluation of .....** | **Management and leadership of the partnership** | **Team meetings plus project team performance** | **Development of the six training modules** | **Development and delivery of three Multiplier Events** | **Development and delivery of Training Event** | **Impact of the training/teaching modules in schools and universities** | **Dissemination measures including academic papers** | **Exploitation work and potential for mainstreaming** | **The quality of the partnership** |
| **Quality Indicators** | Clear division of tasks between the partners.  Clear work plan and time tables are available.  Appropriate distribution of responsibilities among the partners.  Agreed decision-making procedures.  Methods of communication between partners are agreed and regular. | Project team meetings respect the agreed agenda & the team achieves the goals set for each meeting.  Team members contribute to all meetings.  Team members understand and fulfil their distinctive roles in the project and their rights and responsibilities.  Team members carry out allocated tasks on time and to the agreed specification. | Modules are planned and written using expertise from across the partnership.  Modules incorporate a range of media and learning materials.  Module content is appropriate and accessible to the target groups.  Emergent designs are submitted for expert comment regarding (e.g.) usability; potential to benefit teaching and learning styles.  . | Quality of information provided prior to each event including training targets.  Participation and contribution to the event from a range of early adopters.  Teaching and learning styles are appropriate and effective.  Quality of the working environment.  Feedback from target audiences leads to incorporation of changes. | Quality of information provided prior to the event including training targets.  Participation and contribution to the event from a range of end users.  Teaching and learning styles are appropriate and effective.  Quality of the working environment. Feedback from target audiences leads to incorporation of changes prior to KA1 rollout. | Universities incorporate one or more modules and modify their pedagogy as a result  Schools trial one or more modules and incorporate into curriculum planning as a result.  Attitudinal changes result in designated target groups including school students, senior managers and curriculum planners. | Individual dissemination plans are produced by each project partner.  Dissemination activities take place in each country (and more widely) and are evaluated using a comparable format.  Papers and articles are subject to peer review.  Website visits are logged. | A strategy is in place to sustain the website following the end of the project.  A follow-up KA1 course is entered on SEG website.  The course is publicised through other channels.  . | Partners commit time and resources.  The project creates and uses a risk register.  Partners consistently attend meetings and other events.  Partners show a willingness to solve problems.  There is clear evidence of sharing of roles & responsibilities and of a sense of ownership of the project. |
| **Mode** | Internal | Internal (ex for mtg 2) | Internal and external | Internal | Internal and external. | Internal. | Internal and external | Internal and external | External |
| **Evaluation instruments** | Semi-formal review session at partner meetings.. | Self-evaluation with results recorded and shared at the meeting. | Record of peer reviews and of any resulting changes. | Summative questionnaire | Formative session & summative questionnaire | Internal- Most Significant Change used for sample user group. | Survey tool as part of website. Evaluation tool for national workshops. Citation analysis. | Verified by the external evaluator. | Evaluation checklist and/or interviews. |

*Ray Kirtley (External Evaluator) January 8th 2016*