

Open Virtual Mobility

Output O7.A1.2: Design of quality assurance process

- Final draft -

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Affiliation of the reviewer	EADTU

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Imprint: This publication is related to output O7 “Quality Assurance, Dissemination and Sustainability” of the Open Virtual Mobility Erasmus+ strategic partnership founded by the European Commission 2017 - 2020 under **2017-1-DE01-KA203-003494**, URL: <https://www.openvirtualmobility.eu/>

This paper is a public document produced as part of Outcome O7-A1 “Quality Assurance, Dissemination and Sustainability” and describes the background and partnership organization based on the distributed leadership approach.

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A. Executive summary

The theoretical background shortly presents an introduction to the distributed leadership concept on which the division of work within the project is rooted. Then, there are other sections that shortly sum up methodology, based on previous work in milestone 1 of this Output, and results and conclusions of the work in progress presented. After that, the initial drafts of instruments are described, and presented as attachments at the end of the document.

B. What are the objectives covered in this paper?

The main objective of this paper is to present how the division of work within the project has been distributed among partners. This can work as an example for European projects and other calls in which projects are multidisciplinary and involve a high number of partners from international contexts. Also, the multiple interdependencies among outputs are explored in this document.

C. Who is this paper for?

This paper is for anyone involved in E+ projects, MOOCs and in general, online learning in HE institutions and open education. Although leadership could be initially understood as the exclusive competence of leaders, policy makers or stakeholders, the conceptualisation of “distributed” allows the involvement of all participants at diverse levels. Thus, from the interrelation of all elements and from the distributed leadership approach, everyone leads and follows different project dimensions. Therefore, this paper may be of interest to a wide variety of target agents:

- A. Higher Education Educators
- B. Primary, Secondary and Tertiary student teachers
- C. Higher Education Students (BA and MA)
- D. International Offices, Teacher training units/centers
- E. HE leaders
- F. Career Service Units
- G. Researchers and Research Units
- H. Internship providers
- I. Open Education Communities
- J. Policy makers
- K. e-learning designers
- L. and, other practitioners involved in Open Education, online learning and HE.

D. What topics are addressed in this paper?

The main topic in this document is the distributed leadership concept, which is addressed at an introductory level. Likewise, assessment and relevant criteria in Erasmus+ projects are addressed, mainly based on European Commission (2017) guidelines and standards.

E. Contributors

Gemma Tur holds a PhD of Educational Technology from the the University of the Balearic Islands (UIB), Spain. She works as a Lecturer in the Department of Applied Pedagogy and Educational Psychology of the UIB and collaborates in research in the Educational Technology Group of the same university (GITED- GTE). She is the coordinator of several programs in the Ibiza off-campus centre such as Early Childhood, Primary and Secondary Teacher Education courses and the Open Senior University. She has participated in many international conferences such as the PLE Conference, EDEN, EDUTECH, EDMEDIA and EDULEARN. Her research interests include eportfolios and Personal Learning Environments, social media for learning and reflexive aims, and in general, technology enhanced learning in Teacher Education.

Santos Urbina has a double degree, in Psychology and Pedagogy, and he holds a PhD of Educational Sciences. He works as a professor in the Department of Applied Pedagogy and Educational Psychology of the University of the Balearic Islands, teaching related to Educational Technology, in different studies of the Faculty of Education of this university. He also teaches in postgraduate studies of Educational Technology, master and doctorate, organised by the following universities: URV, UdL, UM and UIB. The main areas of research focus on the design, production and use of didactic media, technology-enriched learning environments and the curricular insertion of ICTs.

George Ubachs is Managing Director of EADTU, the European Association of Distance Teaching Universities. He is responsible for the development and support of the EADTU network, policies and execution of its goals in online, open and flexible higher education. He is the coordinator of international academic cooperation networks on networked curricula, virtual mobility, QA in online education and on business models for lifelong learning. George Ubachs is the coordinator of the Excellence movement on quality assurance in online, open and flexible education and leading the ICDE-UNESCO focal point for QA in online education in Europe. He further coordinates the EMPOWERing universities network of a 100 experts representing 12 specific fields of expertise related to online, open and flexible education. As coordinator of these two dedicated networks he works closely with the EUA, ENQA, ESU, ICDE and Unesco.

F. Acknowledgements

All the partners have agreed on work distribution within the project. Special thanks to Ilona Buchem as OpenVM project leader, who has been inspiring to address the challenge. Also, authors would like to acknowledge and thank colleagues for the positive attitude and willingness to accept challenges for the joint work.

1. Aims and Scope

In this draft, there are two main aims to be achieved: the agreement among partners for the quality process in the creation of intellectual outputs and other products; and also, the proposal of an instrument for Quality Gates in Erasmus+ projects. Also, two other tasks are carried out in this paper: the analysis of the interdependence of outputs, and, a timing of KPIs, as a follow-up to the development of project work.

2. Background and rationale (State of the Art)

2.1. Introduction to distributed leadership

Complexity is without doubt one of the main characteristics of Erasmus+ partnerships for two main reasons: the complex nature of the innovation to be carried out by the project; and, the complex nature of the team, in which normally there are members from international contexts and from diverse institutions. To address such a challenging complexity of tasks and teams, distributed leadership seems more suitable than individual leadership, as has been argued in other research contexts such as the educational or entrepreneurial worlds. As stated by Bolden (2011) the leader-centric role that used to be useful is no longer fit for purpose and needs to be substituted by new approaches, such as distributed leadership.

Ancona and Backman (2017, p. 1) present three concrete and efficient definitions. First of all they define “leadership” as:

“Taking responsibility to engage with others to identify and achieve shared purpose in the face of uncertainty (Ganz, 2009). This definition assumes that leadership is a social process that produces contextual awareness (sensemaking), direction (visioning), commitment (relating), and aligned action (inventing) (Ancona, Malone, Orlikowski & Senge 2007).”

The authors distinguish two main types of leadership, the most traditional approach based on an individual role, and the more recent one, distributed leadership. They name and define the concepts as follows (Ancona & Backman, 2017, p. 1):

“Command and Control Leadership: leadership exercised individually by those in formal positions of authority in a clearly defined hierarchy using top-down decision-making.

Distributed Leadership: leadership exercised by multiple leaders throughout the organization -- some in formal positions of authority and some not -- working collaboratively across organizational levels and boundaries.”

The work by Gronn is one of the most acknowledged as he first described it in an extended way, as a new form of leadership understood as a “unit of analysis” (2002) and described it as a holistic composition rather than the aggregation of single individuals. However, according to Bolden (2011),

it was previously coined in early research during the second half of the 20th century, and many other similar concepts were described, such as *shared, collaborative, democratic and participative leadership*. As argued by Bennett et al (2003) (cited in Bolden, 2011, p. 257), all these related concepts share the following three main premises about leadership:

- “Leadership is an emergent property of a group or network of interacting individuals
- There is openness to the boundaries of leadership
- Varieties of expertise are distributed across the many, not the few”

Spillane and Diamond (2007) describe distributed leadership around two main axes: the leader-plus aspect and the practice aspect. The former is about the description of all those who have any leadership-task related, whereas the latter is about the framing it as the result of the practice among leaders, followers and situated interactions.

There exists an interesting discussion on the different effectiveness of the diverse forms of distributed leadership, since for example, Gronn argues there is no impact, whereas others like Leithwood et al. (2006) affirm that there is, according to Bolden (2011). Bolden (2011, p. 259) collects from Leithwood et al. (2006), three types of distributed leadership with a possible impact on production: the first two in positive terms whereas the last could have a negative influence, contributing to a dispersion of responsibility or stability and security. These are the following:

- Planful and spontaneous alignment, influencing short-term aims
- Planful alignment, which may have effects on long-term productivity
- Spontaneous misalignment and anarchic alignment which may have negative impact on both types of organizational aims and productivity.

Ancona and Backman (2017, p. 2) distinguish four organizational contexts in which distributed leadership has been implemented:

- Traditional hierarchies. There are organizations with a hierarchical structure that are willing to distribute leadership without rejecting their own structure.

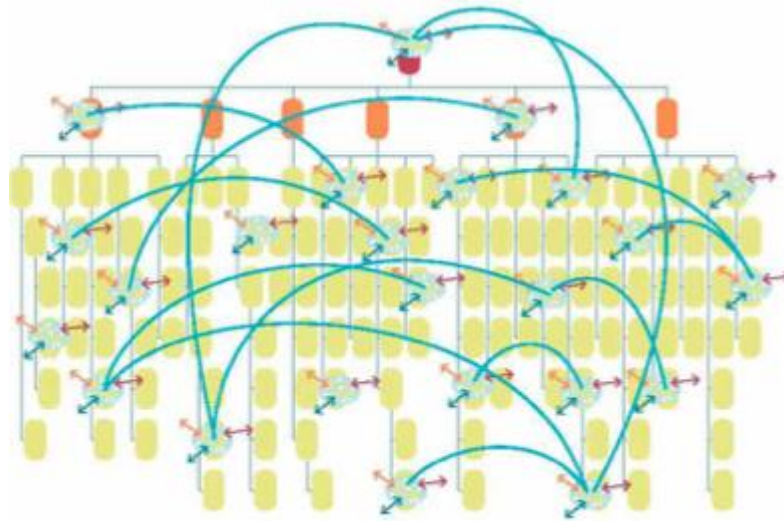


Figure 1. Distributed Leadership in Hierarchies (Ancona & Backman, 2017, p. 2)

- Distributed flat organizations. Other organizations, specially the newest ones, are characterised for their horizontal structure from their beginning.

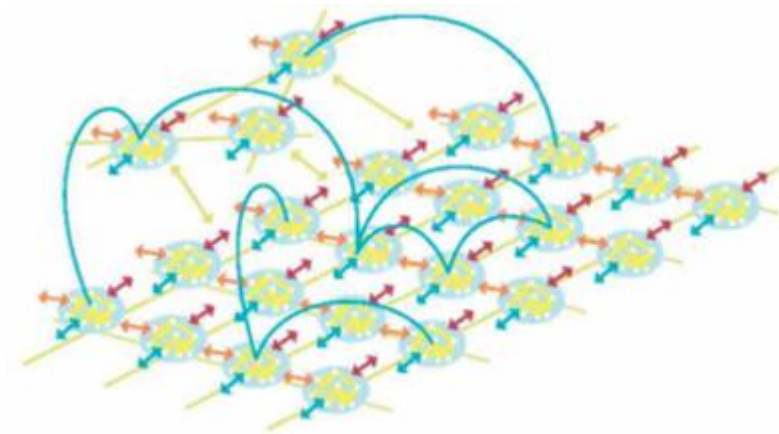


Figure 2. Distributed Leadership in Flat Organizations (Ancona & Backman, 2017, p. 2)

- Nimble networks. These are external individuals and organizations working together for certain innovations, working semi-autonomously, and which may not form an organization per se.

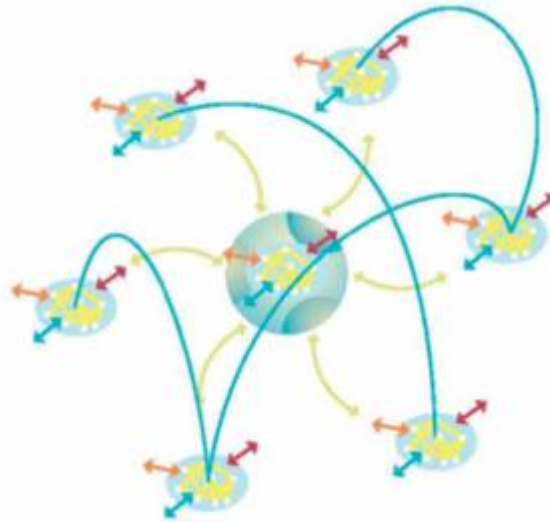


Figure 3. Distributed Leadership in Nimble Networks (Ancona & Backman, 2017, p. 2)

- Cross-organization networks, which work collaboratively across sectors and are able to produce sustainable outcomes.

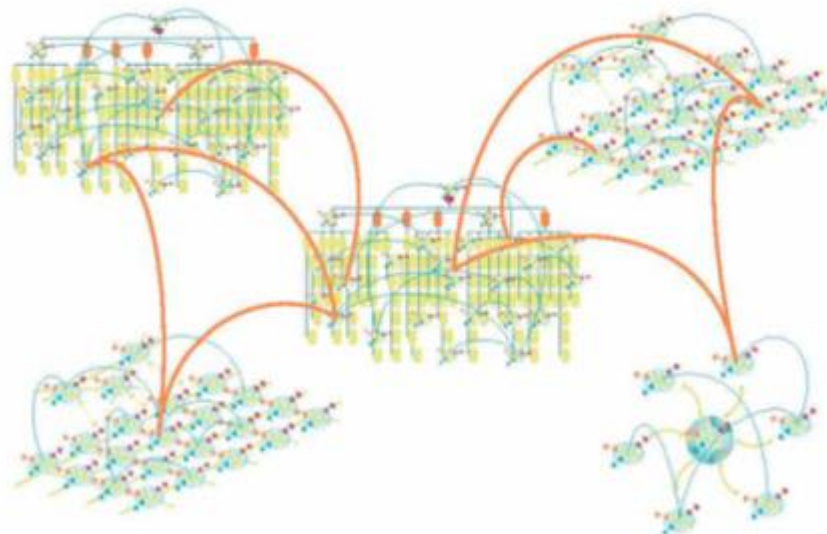


Figure 4. Distributed Leadership Across Organizations (Ancona & Backman, 2017, p. 2)

2.2. Output distribution in the OpenVM project

Based on the categories by Ancona and Backman (2017), the OpenVM project can be considered as a system formed out of collaboration by members of different organisations, and leadership is distributed among all (“Distributed Leadership Across Organizations” as called by the authors), specifically for the production of Outputs. On the project onset a design of pair work between authors and reviewers is presented and approved by all partners (see attachment 1). Also, following the

Distributed Leadership mandate, the work has been divided into diverse steps in which authors and reviewers may contribute, providing feedback.

The six key principles for the distributed leadership that are applied to the OpenVM project are adapted as follows:

- Everyone is a leader and a follower, depending on the Output. For this reason, there are authors and reviewers per Output, with changing roles in the diverse tasks.
- Everyone has a space for creative ideas provided they are aligned with the project aims. For this reason, the construction of Outputs includes diverse iterations, after the intervention by author and reviewers all partners will have the opportunity to give their feedback and suggest improvement.
- The success of the project will depend on the commitment of all partners. For this reason, the mood of participants, their perceptions and attitudes towards their project are carefully monitored. The work in milestone O7.A1.3 is aimed at the construction of a survey to follow these aspects during the development of the whole project.
- Close cooperation is needed and actions have effects on the progress of the other's efficiency. For this reason, online meetings are planned to report on one's own learning and receive rapid feedback on needs and expectations from other outputs.
- Empowering and motivating each other by providing mutual support. For this reason, special attention is given to maintaining a good relationship among all, appreciating all the team's work and encouraging good work. Also, attention will be given to participants' perceptions and feelings. In this regard, in the possible case of negative feelings or lack of understanding, the Project Management Team may take the lead on how to overcome issues offering help.

The distribution of tasks and the cycle of construction includes seven steps:

1. Authors write some brief background notes on a scope template to share with reviewers' initial ideas
2. Reviewers complete and suggest ideas and new references or strategies
3. Authors write first draft
4. Reviewers read, complete and extend notes
5. Authors complete draft with reviewers' suggestions
6. All partners suggest read, comment and suggest new improvement
7. Authors integrate comments and partners' suggestions, and finally prepares final camera-ready version

The following figure represents the progressive development of intellectual outputs:



Figure 5. Progressive development by authors and reviewers of intellectual Outputs

Also, and based on the recommendations by the project “Interact. Sharing Expertise” (n.d) the distribution of roles of authors and reviewers involves diverse tasks such as the ones presented in the following table:

	Authors/ Leaders	Reviewers/Followers
Plan Output work	Plan and design work strategy including conference participation and articles	Give feedback
Monitor output work	Start and develop work Monitor work development Prepare dissemination documents	Suggest Work as co-author in dissemination participation
Review output work	Ask for review Look for reviewers’ expertise Manage conflict and contradictory perspectives	Proactive attitude to start reviews as planned
Communicate output work	Communicate to other partners work done Ask for further reviews and	Complete and support authors oral presentation

	feedback	
Present Output work	Prepare final draft	Support final camera-ready draft

Table 1. Tasks by authors and reviewers in the OpenVM project

The construction of each Output product will be based on the following recommendations to partner, which have been added to the instrument for leaders and reviewers (attachment 1):

- Communicate your work plan for Intellectual Outputs and any changes made to the Project Management Team
- Make sure to involve all partners in working together on the Output you are leading right from the beginning
- Assign tasks to partners working with you on the Output you are leading and communicate frequently with all
- First create a draft and get feedback from partners before you start developing a full solution
- Divide your work into manageable steps and ask partners for peer-reviews of intermediate and final results.
- Receive comments/feedback from partners and target groups and integrate them into your work plan
- Follow the visual identity of the project as set out by relevant templates including project logo, disclaimer and open access licenses.

2.3. Project assessment

As for the final project assessment, an instrument, based on Erasmus + criteria for scoring the final report of projects, is developed (attachment 3). In accordance with E+ guidelines (European Commission, 2017), the assessment criteria include aspects such as: relevance, and quality of its implementation, team and cooperation arrangements, and impact and dissemination. Some of these criteria are applied in different stages of the project development regarding the different nature of each cycle (foundations and concepts, requirements and prototypes, implementation and first pilot and, validation and second pilot). Assessment is based on a Likert scale with five levels from 1 (insufficient) to 5 (excellent).

3. Methodology

As agreed at the first partner meeting in Berlin, the methodology for the construction of instruments will be based on the DBR cycle. Based on the results of the QAF strategy assessment, and due to the general agreement on the workload and the challenge of external reviews on a voluntary bases (Buchem, Tur & Urbina, 2018; Tur & Urbina, 2018), the diverse cycles of iteration of these instruments

will be carried out exclusively based on internal reviews. Thus, at this stage of work both instruments are designed and presented (see attachment 1 and 3). After that, they will be implemented and reviewed by internal users. After that, a new iteration will be implemented, which will be reviewed by internal experts and finally, implemented and reviewed again by all partners.

4. Results

There are two main products as expected results: the authors and reviewers planning (attachment 1), a new instrument to be used for the process and final assessment of Erasmus+ projects (attachment 3). The final outcome is expected to be achieved after a third round of revisions and iterations so the achievement of a final version will be a lengthy process. Two other products are also presented in the appendix of this document: the analysis of interdependencies of Outputs (attachment 2) and the timing of KPIs (attachment 4).

5. Conclusions

Erasmus+ projects involve a relevant number of participants from different institutions working together for common aims. This nature of E+ projects seems very coherent with the distributed leadership approach. To achieve their goals, projects clearly need to have an administration and schedule of work and tasks among all members, and the project leader or coordinator has a key role in the very first steps of writing and planning. However, the distributed role during performance seems to be more suitable for the numerous reasons presented in the background section. While there is as yet no evidence of its efficacy in terms of production as argued in research, the distributed leadership has been the choice to lead the OpenVM. The positive bi-monthly survey results (so far implemented 4 times), which are presented in milestone 3 of the work in this Output, aimed at monitoring social engagement and output production, are the best evidence of successful distribution of tasks and roles in the OpenVM E+ project.

6. References

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Attachments

Attachment 1

The following table presents the teams of authors and reviewers in each Output.

	Institution (Author)	Leader	Institution (reviewer)	Reviewer
O1: Framework and Guidelines	OPEN UNIVERSITEIT NEDERLAND (OUNL)	Kamakshi Rajagopal	KATHOLIEKE UNIVERSITEIT LEUVEN & EADTU	Ilse Op de Beeck/Elke Van der Stappen & George Ubachs

O2: Virtual Mobility Learning Hub	UNIVERSITATEA POLITEHNICA TIMISOARA UPT)	Diana Andone	BEUTH-HOCHSCHULE FUER TECHNIK BERLIN	Johannes Konert
O3: Directory and Matching Tool	BEUTH-HOCHSCHULE FUER TECHNIK BERLIN (BEUTH)	Johannes Konert	UNIVERSITATEA POLITEHNICA TIMISOARA	Diana Andone
O4: E-Assessment Concept and Tool	Fondation UNIT (UNIT)	Florence Ducreau	UNIVERSITA DEGLI STUDI ROMA TRE	Antonella Poce
O5: Open Credentials and Gamification	BEUTH-HOCHSCHULE FUER TECHNIK BERLIN (BEUTH)	Ilona Buchem	CINECA CONSORZIO INTERUNIVERSITARIO	Chiara Carlino
O6: OER, MOOC and Pilots	UNIVERSITA DEGLI STUDI ROMA TRE (UDS Roma3)	Antonella Poce	UNIVERSITAT DE LES ILLES BALEARS	Gemma Tur
O7: Quality, Dissemination, Sustainability	UNIVERSITAT DE LES ILLES BALEARS (ULIB)	Gemma Tur	EADTU	George Ubachs

Afterwards, authors present a first pager scope (table 3), and process of seven steps is designed in order to organise feedback of diverse reviewing agents (individual partners and the whole partnership).

Scope description (for authors only)

OUTPUT [Number] [Title] *See names of all outputs in the timeline: <https://goo.gl/nsgw3o>

ACTIVITY: [Number] [Title of Activity] *See names of all outputs & activities in the timeline:
<https://goo.gl/nsgw3o>

LEADING ORGANISATION [Name] * See all leading organisations in the timeline:
<https://goo.gl/mSjBJw>

MILESTONE [X] *See all milestones in the timeline: <https://goo.gl/ZwtraL>

Who?	Authors	<i>[Insert names of authors here]</i>	<i>[Insert names of authors here]</i>	<i>[Insert names of authors here]</i>
	Reviewers	<i>[Insert names of reviewers here]</i>	<i>[Insert names of reviewers here]</i>	<i>[Insert names of reviewers here]</i>
When?	Created	<i>[Insert date here]</i>		
	Last update	<i>[Insert date here]</i>		
Where?	<i>[Insert a short link to Gdrive/freedcamps/github etc.]</i>		<i>[Insert a short link to Gdrive/freedcamps/github etc.]</i>	<i>[Insert a short link to Gdrive/freedcamps/github etc.]</i>
What?	Scope	<i>What is in scope?</i>	<i>[Insert your text here]</i>	
	Topics	<i>What are the key topics?</i>	<i>[Insert your text here]</i>	
	No scope	<i>What is out of scope?</i>	<i>[Insert your text here]</i>	
	Length	<i>How long will it be? pages?</i>	<i>[Insert your text here]</i>	
Why?	Aim	<i>What is the aim? (check the eform/application!)</i>	<i>[Insert your text here]</i>	
How?	Steps	<i>What are the next steps?</i>	<i>[Insert your text here]</i>	
	Hints	<i>What are your key recommendations?</i>	<i>[Insert your text here]</i>	

Review of the scope document (for reviewers only) * See all reviewers in the timeline:
<https://goo.gl/mSjBJw>

What?	Scope	<i>What is your feedback about the scope?</i>	<i>[Insert your text here]</i>
	Topics	<i>What is your feedback about the topics?</i>	<i>[Insert your text here]</i>
	No scope	<i>What is your feedback about what is out of scope?</i>	<i>[Insert your text here]</i>
	Length	<i>What is your feedback about the length?</i>	<i>[Insert your text here]</i>
Why?	Aim	<i>What is your feedback about the aims? (please compare the eform/application)</i>	<i>[Insert your text here]</i>
How?	Steps	<i>What is your feedback about next steps?</i>	<i>[Insert your text here]</i>
	Hints	<i>Do you have any further recommendations?</i>	<i>[Insert your text here]</i>

Steps by reviewers: seven steps

				When? (internal date per O)
	Who?	What?	Project Deadline	

STEP 1: Create an overview of scope	Output Leader	<i>Output X- Milestone X</i>	<i>November 2017</i>	
Where? (Add link of the document on Drive)				
STEP 2: Get reviewer feedback		<i>What should be removed? What should be added?</i>	<i>December 2017</i>	
STEP 3: Create the first draft	Output Leader	<i>Use feedback from step 2</i>	<i>January 2018</i>	
Where? (Add link of the document on Drive)				
STEP 4: Get reviewer feedback		<i>What are the key recommendations? What should be improved?</i>	<i>February 2018</i>	<i>Two weeks before</i>
STEP 5: Create final version	Output Leader	<i>Use feedback from step 4</i>	<i>March 2018</i>	
Where? (Add link of the document on Drive)				
STEP 6: Get feedback from all partners		<i>Are there any new ideas that should be added? What are the final comments?</i>	<i>April 2018</i>	
STEP 7: Publish/upload your final result	Output Leader	<i>Use feedback from step 6</i>	<i>May 2018</i>	
Where? (Add link of the document on Drive)				

Recommended pieces of advice to follow when working together:

- Communicate your work plan for Intellectual Outputs and any changes to it to the Project Management Team
- Make sure to involve all partners in working together on the Output you are leading right from the beginning
- Assign tasks to partners who work with you on the Output you are leading and communicate frequently with all
- First create a draft and get feedback from partners before you start developing a full solution
- Divide your work into manageable steps and ask partners for peer-reviews of intermediate and final results.
- Receive comments/feedback from partners and target groups and integrate them into your work plan
- Follow the visual identity of the project as set out by relevant templates including project logo, disclaimer, open access licenses

Attachment 2

Taking advantage of the interrelated process of work within the project, and in connection to work on the Quality Assurance Framework developed in milestone A1.1, the work in each Output is also highly connected. The inner dependencies of the work can be summarised as follows:

	O1	O2	O3	O4	O5	O6	O7
O1							X
O2	X					x	X
O3	X	X				x	X
O4	X	x	x		X	x	X
O5	X	x	x	X		x	X
O6	x	x					X
O7							

Attachment 3

A very early instrument has been developed so far as follows:

Assessment grid

Excellent (EXC)- 5	Outstanding performance
Very good (VG)- 4	Above average performance
Good (G)- 3	Satisfactory
Sufficient (SUFF)- 2	Performance meet the minimum criteria
Insufficient- 1 (INSUFF)	Weak: further work is required

QUALITY ASSURANCE STANDARDS OF OUTPUTS for all outputs

	ASSESSMENT (max 5 points) 1-2-3-4-5	SHORT DESCRIPTION OF ASSESSMENT
Relevance (max 20 points)- MAY 2018 AND MARCH 2019 (the value of each criteria from 1 to 5 is 0.8)		
Objectives achieved		
Needs and issues addressed		
Innovation on previous work on VM		
Enhanced value of work carried out in single contexts		
Formal aspects: language accuracy and style guide		
TOTAL POINTS		
Quality of the Output implementation (max 25 points)- DECEMBER 2019 AND JUNE 2020		
Action in Output was implemented in line with the approved grant application		
Contribution and consistency with the project's objectives and contribution		
Elements of innovation beyond regular outputs of partners		

Teaching and learning activities: ... preparation, monitoring and support to participants		
Teaching and learning activities: e-assessment, badges and open credentials		
Quality of the project team and the cooperation arrangements (15 points) (This section is assessed based not only on the drafts submitted, but also on working digital environments)		
Coordination by Output leader		
Accomplishments of roles by each partner		
Accomplishments of deadlines		
Impact and dissemination- (40 points) - (the value of each criteria from 1 to 5 is 0.8)		
KPI: number of OER items		
KPI: number of MOOC participants from partner organisation and external participants		
KPI: number of e-assessments		
KPI: number of Open Credentials		
KPI: number of countries represented		
KPI: number of respondents in data collection-activities		
KPI: number of visitors of Learning Hub		
KPI: number of contributions to conferences and journals		
KPI: number of initiative as spin-off		
KPI: number of participants in Multiplier Events		

Furthermore, there are some general criteria to assess in relation to: formal aspects and language and translations.

Common criteria

GENERAL DIMENSION (max 50 points?)	ASSESSMENT (max 5 points)	SHORT DESCRIPTION OF ASSESSMENT
---------------------------------------	---------------------------	---------------------------------

Formal aspects		
Citations and references		
Language accuracy (English version)		
Language Translations		
Dutch		
French		
German		
Italian		
Spanish		
Romanian		

Attachment 4

The assessment of the KPI can be based on the expected outcomes for each criteria that were included in the eform:

KPI Name	Number
VM OER items created	450
VM MOOC participants form partner organizations	900
VM MOOC external participants	500
VM E-Assessments	400
VM Open Credentials issued	300
Countries represented in project activities	36
Respondents in data-collection activities	300
Visitors of the VM Learning Hub	10,000
Contributions to journals and conferences	50
Spin-offs from the project	30

Based on the total number, a geometrical progression is scheduled, considering that from the second half of the project to the end, the number of KPI has to be higher.

KPI Name	Month 12	Month 18	Month 24	Month 30	Month 36
VM OER items created	25	75	150	300	450
VM MOOC participants form partner organizations	0	0	0	450	900
VM MOOC external participants	0	0	0	250	500
VM E-Assessments	0	0	0	200	400
VM Open Credentials issued	0	0	0	150	300
Countries represented in project activities	9	12	15	18	36
Respondents in data-collection activities	0	0	0	150	300
Visitors of the VM Learning Hub	0	0	2500	5000	10,000
Contributions to journals and conferences	5	10	20	35	50
Spin-offs from the project					30