Annex1_ItemIII_Presentation_TLNMobility
1. Objectives and Main Tasks of TLN Mobility

Objective 1: Preparation of a coordinated call on transnational mobility measures for youth and young adults
- develop timetable for coordinated and national/regional action (Task A)
- define common parameters on eligibility, target groups, quality, implementation structures (Tasks B, C, D, E)

Objective 2: Launch of a coordinated call on transnational level
- publish coordinated call (based on common parameters) on network’s webpage (Task F)
- organize transnational conference to maximize participation in call (Task K)

Objective 3: Support for launch of individual calls on national/regional level
- define and implement specific support which MS (may) request (Task G)
- set up partner search database (Task H), organize partner search forum (Task I)
2. Coordination between shared and direct management

EU regulations for controlling expenditure

MS/regions in charge of managing expenditure

Project operators in charge of implementing the action

ESF

TLN Mobility

Coordinated action

MS/reg agree on

EU staff in charge of managing expenditure

Project operators in charge of implementing the action

LLL
3.1 Timetable for main actions 2013

**Network Meeting I**  
- 27-28/02

**Network Meeting II**  
- WGs Quality (DE/Galicia) and Eligibility (DE): 20-21/06

**Network Meeting III**  
- 23-24/10

**Midterm Conference (DE)**  
- 10/2013

- Development of timetable for common call (Trento)
  - for NW meeting II

- Proposal for target group (SE)
  - for NW meeting II (draft) and III (finalization)

- Proposal for implementation structures (IT)
  - for NW meeting II (draft) and III (finalization)

- Consultation with partners on support for national/regional calls (PT)
  - until publication of coordinated call 03/2014

- Setting up project website and partner-search database
  - partner search database until launch of national/regional calls 05/2014
3.2 Timetable for main actions 2014

- **Network Meeting III**
  - 02/14

- **Publication of Coordinated Call**
  - DE; 03/14

- **Network Meeting IV**
  - 06/14

- **Partner Search Forum (PL)**
  - 11/14

- **Network Meeting V**
  - 11/14

- **Final Conference**
  - 12/2014 (PACA)

**Windows for developing national/regional calls**
- (04/05 14)
- (06/07 14)
- (08/09 14)
- (10/14)

**Support for national/regional calls (PT)**

**Administration of partner-search database (DE)**
4. Core Partners and Lead Responsibilities (1)

- **Germany (Lead partner)**
  - Various tasks (Quality, Eligibility, Evaluation etc.)

- **Galicia**
  - Task D.2: Quality criteria/preparatory phase

- **Italy**
  - Task E: Implementation structures

- **PACA (France)**
  - Task L: Transnational conference on final results
4. Core Partners and Lead Responsibilities (2)

<table>
<thead>
<tr>
<th>Country</th>
<th>Task I: Partner Search Forum</th>
<th>Task G: Support launching of national/regional calls</th>
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</thead>
<tbody>
<tr>
<td>Poland</td>
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<td>Portugal</td>
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<td>Sweden</td>
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<tr>
<td>Trento (Italy)</td>
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</table>
4. Other Partners (3)

Ireland
- Contribution to various tasks

Spain
- Contribution: make relevant information available to regional ESF MA’s and Intermediate Bodies

Catalonia/Spain (new partner)

Flanders/Belgium (new partner)
### 5. Application 14/09/2012: Budget (1)

<table>
<thead>
<tr>
<th>Total eligible costs: 246,849 €</th>
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</thead>
<tbody>
<tr>
<td>Travel, accommodation and subsistence allowance: 72,400 €</td>
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</table>

- two external experts or stakeholders plus facilitator and evaluator for Network meetings
- three external experts or stakeholders for working group meetings on Quality (DE) and Eligibility (DE)
- three external experts or stakeholders for ad hoc meetings of working groups on Target group (SE) and Implementation (IT)
- eight external experts or stakeholders plus evaluator and facilitator for conferences (DE, PACA) and Partner Search Forum (PL)
- Catering for conferences and Partner Search Forum
- **Partners cover costs for travel and accommodation when attending Network meetings and working group meetings**
5. Application 14/09/2012: Budget (2)

**Costs of services: 127,900 €**

- Webpage
- Translations of coordinated call (DE)
- Reproduction/Publication of final report (DE)
- Reproduction/Publication of a guideline or leaflet as support for launching national/regional calls (PT)
- Evaluation (DE)
- Interpretation at final conference (PACA)
- External expertise: Facilitation of Network, Expert on „Quality criteria“, Expert on „Eligibility“ (DE)

**Administration costs: 30,400 €**

- Hire of rooms for Partner Search Forum (PL) and conferences (DE, PACA)
- Interpretation Booths for final conference (PACA)

**Overheads: 16,149 €**
6. Contracting out of implementation work

<table>
<thead>
<tr>
<th>Facilitation</th>
<th>• Stephanie Koenen</th>
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<tr>
<td>Evaluation</td>
<td>• IAW: Bernhard Boockmann, Hans Verbeek, Andrea Kirchmann</td>
</tr>
<tr>
<td>Expert on Quality</td>
<td>• Andrew McCoshan</td>
</tr>
<tr>
<td>Expert on Eligibility</td>
<td>• Sören Kristensen</td>
</tr>
<tr>
<td>other experts</td>
<td>• Travel/Accomodation/Subsistance allowance budgeted for three experts for one ad hoc meeting on Target group and one ad hoc meeting on Implementation structures</td>
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External Evaluation for the Transnational Learning Network *Transnational Mobility Measures for Disadvantaged Youth and Young Adults*

Concept and tools for Working Group “Eligibility”

A Coruña, 12 April 2013
Agenda

• The task
• Our team
• Methods
• Organisation
The task

- A process evaluation will accompany the Network and the Working Groups “Eligibility” and “Quality”
- It will be a tool for quality development and quality assurance and the process of transfer and mainstreaming
- It will apply a cross-culturally sensitive approach and will further the awareness of differences in political and social conditions
- In the final stage of the Network, it will take stock of outcomes, results and potential effects
The task

- No compulsory routine! – our aim is to choose practical solutions and methods that really deliver a service to the Network
- The evaluation will be organised in close dialogue with the network partners at the network events
- Questionnaires and other materials will be easy to handle
- The evaluation will work hand in hand with facilitator and experts
Our team

Bernhard Boockmann
... will be responsible for the project management
... has substantial experience from ESF and other EU projects on labor markets and social affairs

Hans Verbeek
... will deliver the formative evaluation steps jointly with Bernhard Boockmann
... is an expert regarding policies for disadvantaged youths

Andrea Kirchmann
... will be in charge of methods and the final evaluation steps, maintaining an “outside perspective”
... will contribute her experience from EQUAL Development Partnerships and other formative evaluation projects
Methods

Two major tools will be used:

• **Key questionnaire**
  - a survey of the Network partners developed jointly by the evaluator and the group and conducted after each of the Network’s events

• **Working group journal**
  - tracks the current state of the operations of the Network and Working Group
  - keeps a record of whether tasks have been implemented, outputs have been produced and objectives have been reached

Both tools will be presented in more detail in a moment ...
Organisation

- Key questionnaire for all meetings, to be filled after the meeting
- Summary of the responses (short report and PPT presentation) as an input to the following meeting
- Working group journal, updated regularly
- Interim report by January 2014
- Final evaluation report by December 2014
Key questionnaire

• Short questionnaires addressing key aspects of the meetings
• Goals: feedback as a support for the work within the group and tracking the success of the Network
• Questionnaires will be sent via Email:
  - Flexibility: you can answer them when you have time (but please return them within a week, when your impressions are still fresh)
  - We might send you very friendly reminders
• It is important to get feedback of all participants in order to report an accurate summary of opinions

A small amount of your time worth taking!
Guideline to the key questionnaire

• You will obtain the questionnaire as a Word-Document via Email

• Save the document with your name and your organisation on your computer:

  Example: document received: questionnaire_d_1.doc
  Save document as: questionnaire_d_1_hans_verbeek_iaw.doc

• It is important that you answer every question

• Save the answered questionnaire and send it to: TLN@iaw.edu
How to answer the questions

• Four kinds of questions:
  - Evaluating statements and questions on a five point scale:
    Please tick one of the five boxes in the scale
  - Text fields for comments and suggestions:
    You can enter your comments and suggestions into the grey fields. There is no space limit
  - Questions with only one answer allowed (standard case):
    Please tick one of the boxes
  - Questions with multiple answers allowed (only where explicitly indicated):
    Please tick all appropriate boxes
What we do with the questionnaire

• We will extract a summary of opinions from the previous meeting and present them in a concise form

• We will sometimes compare results from several meetings, to track the development of the Network over time

• Your answers will also be the most important information source for our final report

• We will highlight aspects that have attracted most comments

• If we cite from individual comments and statements, we will do so in anonymised form. We might contact you if we are in doubt whether we have understood your point correctly
Working Group journal

- Updated after every Working Group meeting
- Structure:
  1. Key questions:
  2. Tasks and Milestones
  3. Work process
  4. Working Group outputs
- Goal: Tracking the progress of the main aspects within the Working Group
- Support the Working Group by delivering aggregated information on the whole process
Questions and comments ...?

- We strongly rely on your feedback!

How to contact us:

Email: TLN@iaw.edu
Phone: +49 7071 98 96 27
Fax: +49 7071 98 96 99
Annex3_ItemV_Presentation_TaskB
V. Introduction „Task B“

- Objective
- Partners
- Challenges
- Key questions
- Approach
- Output
Define a set of common eligibility rules for the coordinated call on transnational mobility measures

(Common rules should allow the necessary flexibility on national/regional level)
- **Lead responsibility**: Germany

- **Contributors**: Flanders, Galicia/Spain, Ireland, Italy, Portugal, Spain

- **External expert**: Søren Kristensen
Which are **specific expenses** of transnational mobility measures (e.g. translation, foreign language courses, child care, insurances, accompanying staff)?

And **which** of them **should be eligible**?
Key questions (2)

- Which **use** can be made of **simplified cost options** (lump sums or standard unit costs)?

- If simplified cost options are used which **expenses** are **included**?
Key questions (3)

- How are expenses of transnational mobility measures been split between the transnational partners?

- Whether and under which conditions expenditure of foreign partners is eligible?
If preparatory period, should costs related to partner search, identification and building the transnational partnership be eligible?
Key questions (5)

- Which **European, national and regional regulations** have to take into consideration?

- Which **lessons** can be **learned** and which **eligibility rules** can be **used/adopted** from other transnational mobility measures?
Questionnaires to gather information from Member States/regions about the key questions to be tackled

External expertise
Approach (2)

- **Three WG meetings:**
  - 12.04.2013 (A Coruña)
  - 26.09.2013 (Trento)
  - xx.12.2013 (?)
Common rules will be discussed and agreed on in a continuous process.

- 02/2013: Network meeting I
- 04/2013: WG meeting I
- 06/2013: Network meeting II
- 09/2013: WG meeting II
- 10/2013: Network meeting III
- 12/2013: WG meeting III
- 02/2014: Network meeting IV
WG paper with common eligibility rules for the coordinated call on transnational mobility measures
Annex4_ItemV_Input_Kristensen
Eligibility of costs – Challenges and points for reflection

Søren Kristensen, techne
Á Coruna, April 12, 2013
Taxonomy of costs

Related to participants: e.g. travel, accommodation, nurture, insurance

Related to pedagogical processes: e.g. motivation, selection, preparation, monitoring/mentoring, follow-up

Related to organisational aspects: e.g. administration, networking, staff, premises, depreciation of equipment
- Participants (NEETs + ?)
- Project organisers (size, experience, infrastructure)

Target groups:
Definition of “disadvantaged”:  
- unemployed  
- lack of formal qualifications  
- ethnic background  
- physical handicaps  
- learning deficiencies  
- deprived urban or rural areas  
- delinquency  
- family problems  
- young mothers  
- poverty  
- etc.
Policy aims:

- Self-referenced: number of participants
- Sustainability: capacity building of organisations
Nature of mobility activity:

- Duration
- Mode (placement, work camp, social enterprise etc.)
- Accommodation
- Etc.
Pedagogical aspects:

- Intended outcomes
- Methods/interventions
### Pedagogical interventions

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<thead>
<tr>
<th>Before</th>
<th>During</th>
<th>After</th>
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<td><strong>Induction</strong></td>
<td><strong>Immersion/accompaniment</strong></td>
<td><strong>Debriefing</strong></td>
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<td>Motivation</td>
<td>Monitoring</td>
<td>Evaluation</td>
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<tr>
<td>Selection</td>
<td>Tutoring</td>
<td>Perspectivation</td>
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<td>Preparation</td>
<td>Mentoring</td>
<td>Guidance</td>
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<td>Linguistic</td>
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<td>Documentation and</td>
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<td>Cultural</td>
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<td>recognition of</td>
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<td>Practical</td>
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<td>learning outcomes</td>
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<td>Pedagogical</td>
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<tr>
<td>Psychological</td>
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**Pedagogical interventions**
- "One size fits all"
- Graduated according to costs of living

National cost levels
Administrative ease

- Lump sums
- Earmarked subventions

vs. quality control
What’s fair?
What’s appropriate?
Full financing or co-financing?

Key questions:
Eligibility of costs - Challenges and points for reflection

Summary of input at the meeting in Á Coruña, April 12th, 2013

Costs can either be ascribed to the individual participant (e.g. travel, accommodation, nurture, insurance, etc.), to pedagogical interventions (selection and preparation, accompaniment during the stay, and follow-up), and to organizational infrastructure (e.g. administration, translation, partnership-finding, networking, use of external specialists etc.).

Eligibility of costs under each of these headings depend, however, on the exact nature of a number of variables, notably a) the nature of the target group, b) the definition of quality criteria, and c) the desired impact of the programme.

Concerning nature of the target group, it was pointed out that there was a large variation in this. The so called “NEETS” (young people not in employment, education or training”) cover a wide spectrum of profiles – from young people with university degrees, foreign language skills and work experience, who have been hit by unemployment because of the current economic crisis, to young people with no formal qualifications or previous experience on the labour market as well as a combination of other disadvantages of a social, economic and psychological nature. Naturally, the inclusion of the latter would entail quite different types of costs compared to participants of the former group.

Concerning the definition of quality criteria, these impinge on the eligibility question in so far as they determine the nature and extent of pedagogical interventions, and hence also what can be funded. A decision to define quality criteria in terms of pedagogical interventions before, during and after the stay must necessarily also be reflected in both eligible measures (e.g. in terms of preparation, accompaniment and follow-up) and the levels of funding available for this.

Finally, concerning the desired impact of the programme, the nature of this aspect to a very large extent determines the eligibility of organizational costs. If – besides the actual project activities themselves – it is also desired to ensure the sustainability of these beyond the lifetime of the programme and to ensure that as wide a spectrum of organizations as possible develop their capacities to work with mobility, it is an option to allow for costs that allow them to build up an infrastructure to handle such activities. This could e.g. cover costs incurred through activities related to partner-finding, networking activities, translation, legal advice, participation in conferences and events, training of staff etc.

An integral issue in the discussion of these three aspects is the issue of administrative ease versus control. Project administration and implementation can be made significantly easier and more flexible by working with lump sums or standard cost units. This is the case e.g. in the mobility strand of the Leonardo da Vinci (LdV) programme, where subventions are given in the shape of lump sums to project operators. Standard cost units – e.g. for staff, travel etc. – are also used in some strands of the LdV programme (e.g. Transfer of Innovation projects) to avoid complicated calculations both in the planning and the reporting phase. In many cases, these are graduated according to the level of costs (salary levels, costs of living) in the hosting and sending countries.
Annex5_ItemVI_Analysis_Questionnaires
VI. Analysis questionnaires (1)

- **Feedback** from: Galicia/Spain, Ireland, Italy, Poland, Spain, Trento/Italy (additionally German examples)

- Examples financed out of different **funding streams**: ESF; LLP; Youth in Action; private and regional funds

- Examples with different **target groups, objectives and activities**
VI. Analysis questionnaires (2)

- First findings “Type of costs”:
  - No “clear picture”, but in all examples the following costs are eligible:
    - Travel, accommodation and subsistence of participants
    - Language training
    - Management of the mobility measures
VI. Analysis questionnaires (3)

- **First findings “Lump sums”**

  - Lump sums in **LLP** funded examples
  - **ESF** funded examples are mostly without lump sums → **Exceptions**: Germany with IdA and Poland (use of LLP rules in ESF)
VI. Analysis questionnaires (4)

- First findings “Split between partners”:
  - It seems to be a “clear picture”: Each partner pays its own costs (at home and abroad)
  - But most of the examples provided are only one way exchanges
  - Exceptions: in examples with exchange of participants (sending and hosting)
VI. Analysis questionnaires (5)

- Deeper assessment after the WG meeting

- Results will be integrated in 1st draft of WG paper
VI. Example Leonardo da Vinci

Input Søren Kristensen
VI. Example IdA (1)

- “Type of costs”
  - Project-related staff costs
  - Costs of transnational mobility into other MS
  - Project-related material costs
  - Award of contracts
  - Administrative overhead/ indirect costs (7%)
VI. Example IdA (2)

- “Lump sums”
  - Mobility lump sum for participants (during stay abroad):
    a. Subsistence allowances
    b. Travel costs in host country
  - Travel expenses for travelling abroad are not included
VI. Example IdA (3)

“Split between partners”

- Costs arising in Germany for participants from other MS *could be financed* (exception travel costs and costs for accommodation)
Annex6_ItemVIII_Next_steps
VIII. Summary - Next steps

- Minutes, summary of results (of questionnaires and discussion) and external expertise

→ 1st draft of WG paper (with proposals!)

→ Input for next Network meeting in Rome in June
VIII. Summary - Next steps

- **Next WG meeting**: 26. September in Trento
TLN Mobility – First meeting of the Working Group “Eligibility” on 12 April 2013

Meeting venue: Mans Business Center by Fundación Paideia
Polígono de Pocomaco, Parcela D-22, A Coruña

List of participants

<table>
<thead>
<tr>
<th>Surname, first name</th>
<th>Institution</th>
<th>Member state/ Region</th>
<th>Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ares Méndez, Vicente</td>
<td>Fundación Paideia Galiza</td>
<td>Galicia (Spain)</td>
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<td>Ballester, María</td>
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<td>Bernardi, Sabina</td>
<td>Interpreter Italy / International Conference Service</td>
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<td>Boockmann, Bernhard</td>
<td>Evaluation TLN Mobility / Institute for Applied Economic Research (IAW)</td>
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<td>Caputo, Rosita</td>
<td>Ministero del lavoro e delle politiche sociali</td>
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<td>6. Cores, Ana María</td>
<td>Stakeholder Galicia Dirección Xeral de Proxectos e Fondos Europeos</td>
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<td>Germany</td>
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<td>9. Koenen, Stephanie</td>
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<td>10. Kristensen, Sören</td>
<td>Expert WG Eligibility Techne</td>
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<td>11. Mc Intosh, William</td>
<td>ESF Managing Authority</td>
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<td>12. Mercer, Allan</td>
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