

# **External Evaluation Report 1**

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# **1. Introduction**

## **1.1 Background**

The evaluation report summarizes the first halve of external evaluation for the BALL – Be Active through Lifelong Learning. *Grant Agreement of a: project with multiple beneficiaries under the ERAMUS+ programme AGREEMENT NUMBER – 2014-1IS02-KA204-000173.*

The project addresses the urgency to establish guidelines and best practices on how best to prepare individuals at an early stage for the “third age”, with emphasis on learning, cultural environment and ambiance, and sharing of knowledge. This is influenced by the fact that increased life expectancy will lead to a steady increase in the number of people in their third age and in retirement. BALL aims at facilitating the entry into retirement through early and systematic planning, to add value to the “third age.” The main objective of the project is to develop innovative guidelines and recommendation for use at lifelong learning centers; universities; companies; unions; associations; local and regional authorities who need and wish to prepare and encourage individuals for the third age. The project defines the age group of 50 to 70 as the target group for such early preparations. The outcomes will be used to raise awareness of these issues.

To reach this main goal, the project develops a number of methods, instruments and outputs for raising awareness towards the third age. The Coordinator is the Evris foundation. Evris is the applicant partner responsible for management and organization. The team is made up of four organizations belonging to three European countries: The Lublin University of the Third Age (Poland), Evris Foundation (Iceland), the Permanent University of Alicante (Spain) and the University of the Third Age Reykjavik (Iceland).

## 1.2 Methodological approach

In order to collect sufficient information and data to be able to evaluate this project according to basic scientific standards, as well as to needs and requirements of the project groups, a holistic evaluation concept was designed and agreed with the project coordinator. Several methods were used to this end. Much of the evaluation was of formative and summative nature, based on observation, desk research, questioning in written and oral form, as well as analyses of peer group discussion. Instruments of the project included questionnaires, reports, interviews and expert talks, and meetings reports.

To summarize, the external evaluation focused on following areas:

- Product level (Website and Logo, Key factor Collection, Pedagogic Concept, Draft Curriculum etc.)
- Process level (Project meetings, project Phases, Time Management, Crisis Management, Degree of Satisfaction of Partners)
- Impact level (dissemination Activities in Quantity and Quality)

During the evaluation process in September 2015, the external evaluator was in contact with the coordinator of the project via email, telephone, and face-to-face meetings in the promoter office in Reykjavík. The coordinator provided the evaluator with all relevant information, documents, and data, in a timely manner and gave access to all parties involved in the BALL project.

The overall working atmosphere between the coordinator and evaluator was open, friendly, and professional, allowing different points of view to be properly addressed. Thus, there was a general agreement between partners in regards to how external evaluation should be placed in the BALL developed projects, which methods and instruments should be developed, adapted and implemented and how the received data and information should be evaluated to ensure a positive development of the BALL project.

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## **2. Evaluation of European project BALL – Be Active through Lifelong Learning**

### **2.1 BALL website and logo**

The BALL website (<http://www.ball-project.eu/>) was developed and set up in December 2014. This was in accordance to the aims of the project.

The setup and design of the website is quite complex. What appears well done is that the site is outlined in a structured way and the topics for the target group are visible and well set up. The start page has several links to different material and the aims of the project are quite visible. A couple of well selected icons and pictures support the presentation of written content about the project, its background, partnerships, meetings, etc. The wording chosen on the website connects well to the project and it is easily accessible through the eight sub-sites. The content presented on the website contains all necessary and available information about the project as it is at the current state of development. The download section allows access and download of all major projects outputs achieved so far and so provides a good archive. The quite basic navigation concept and menu structure allows visitors an easy use of the information. Of significant benefit is the fact that the website provides the material in all partner languages. If one searches on Google about “Ball Life long learning” or “Life long learning Ball” etc. the BALL website is under the first 3-5 results, supporting the dissemination of the project. Lastly, the project logo design is well designed.

### **2.2. BALL Key factor collection**

First the project has begun a national mapping report to gain knowledge of the current situation. This is done in each partner country: Iceland, Poland, and Spain.

The BALL key factor collection was based on Mapping research, undertaken in order to gain knowledge of the current situation in the partner countries but with wider reference to Europe. This mapping exercise finalized. Its conclusion can be found in a Comparative report, entitled “Looking forward to a dynamic third age”, available at

[www.ball-project.eu](http://www.ball-project.eu). The report is well researched and the discussions and debates are of excellent quality. The statistical analyzes and data gathering will serve as a foundation for the work ahead in the BALL project, as well as for further European labour market research. Demography and populations statistics for each country and for Europe were studied and compared. Labour market participation rates, employment and activity rates were studied and the pension systems were compared. Qualitative research methods in the form of focus groups of experts and retirees were performed in order to shed light on future trends.

Quantitative research has been used as well, in the form of the aforementioned Mapping exercise, along with a follow-up survey performed in all partner countries. The survey serves as a second part of the research conducted in the BALL-project, in collaboration between research teams of the three countries, Iceland, Poland, and Spain.

The presentation of results in form of a collection of important key factors and topics can be found in the research reports. The research reports from the member countries are all clearly stated and show interesting results about the attitudes of those that have entered the third age, or are about to enter it. The report is highly relevant for the further development and implementation of the training programme for the target group and the reports appear well developed and satisfy all basic scientific demands.

The presentation of results shows a substantiated and comprehensive collection of key messages and statements of the survey participants. The information provided in this form appears complex but well substantiated, the basic statistic conclusion of course far away from being a representative sample, as for the all of the countries surveys the sample is mainly women. In Poland they are 81,60% of the sample, in Spain women are 60%, and in Iceland they are in "vast majority". In all the countries surveyed, the majority of respondents are educated women and therefore the main conclusions should take that into account. However, it is clearly explained in the reports that the gender ratio was not biased by design, but ended up so because of the sample that answered the questionnaires. The statements and messages shown in the surveys of the key factor collection seem to be extremely interesting and important from the perspective of the third age population, as they contain lots of information and hints for policy making. The results

are quite promising for the success of the guidelines and approach built, on the basis of the key factor collection in all countries. The restrictions of the surveys are that the sample is made up of mainly educated women living in cities. This should be considered when generalizing the results.

Despite the aforementioned limitations of the surveys, they will serve as a basis for a research programme that can approach a quite common need and demand of the target group in all partner countries.

Basically, the key factor collection seems to have fully reached the intended aims of giving a basis for discussion and further elaboration of learning content and units. The messages received by the survey participants are clear enough to allow the identification of main areas and sectors of interest in relation to European third age citizenry, and do also give pedagogical advice for the elaboration of the learning processes. It must also be stated that the statements received in the qualitative part of the key factor collection from all partner countries do create significant value and basis for further discussions and interpretation, which may take place at a later stage of the project. Also the recommendations made for the learning process should form the basis for an ex-post summative evaluation of the materials and training programme developed.

### **2.3. BALL Pedagogic concept**

The main aim of the BALL was to present the basic considerations around the pedagogical framework overarching the guidelines and training programme to be developed in the BALL project. The main purpose of the BALL-project is to develop recommendations and guidelines on good practices to facilitate the entry into retirement through early and successful planning, thus facilitating and adding value to life in the third age

It is the attempt to customize general pedagogical theory and approaches to the needs and background of third age population. The concept is divided into three parts where the first and third part are more theoretical considerations and the second part will discuss the deductions and experiences made from the mapping and the surveys in the first half of the project. The whole pedagogic concept from an external perspective can really be seen as well developed, the content presented therein is sharp and concise, all statements made out of

theory are well substantiated by statistical analyzes. The combination of the mapping comparison about the third age population in general, and the survey conducted of the expectation and real life experience of those that now are in this demographic group is concrete and practical and is convincing and quite easy to read.

However, there are is one observation to be made on this well developed product which could certainly be a standalone output of the project with a lot of relevance for the pedagogical discussions around the third age group

#### **2.4. Recommendations and guidelines**

Recommendations and guidelines on good practices to facilitate the entry into retirement through early and successful planning, are the main purpose of the BALL project.

Therefore, much emphasis is put into the development of those concepts for stakeholders. Especially the considerations and deductions made out of the key factor collection as well as the pedagogic concept build the ground for quality evaluation. At the time of the interim evaluation, the Mapping report and the survey reports have been made available on the website and look promising for the next steps of the project.

Next steps are the development of guidelines based on the results of the research done. The first half of the BALL project appears already well developed, the content is of good quality and concise. It appears that the methodological approaches defined in the key factor collection and in the pedagogic concept are respected to a great extent. From the current perspective it can be stated that the curriculum setup and content meets the requirements from the project application on quantitative and qualitative level.

Nevertheless, the implementation of the guidelines (on content and methodological level) creates quite a challenge for the pilot implementation and sustainable use after the project end: the project partners responsible for this should be aware of the fact that the high quality of the recommendation and guidelines is only fruitful and usable if implemented in a training programme on the same quality level. Special attention should be paid to the part of authentic location learning,

Also, it appears that there are some culturally dependent content included, although there appear to be similarities between the partner countries. There are some differences that exist due to variations in traditions, cultures and economical and social systems. This needs to be taken into account regarding implementation. The final publication and dissemination of the guidelines should stress this fact so that they are able to adapt the content if necessary to local and regional circumstances.

### **3. Evaluation of BALL Process Level**

#### **3.1. Kick-off phase**

The BALL project seems to have enjoyed quite a well developed kick off phase. The first meeting in September 2014 in Reykjavík seems to have supported the development of team spirit and common approaches.

The process evaluation performed related to the start and kick off phase of the project did show very positive values and estimations from all project partners, with no significant problems or shortcomings apparent. All partners contributed from the very first project day to the different development steps. As far as the external evaluator is aware, there seems to have been a positive and target oriented working atmosphere right from the project start.

Out of this perspective it can be stated that project promoter and his staff managed to set the project on the right track right from the first project day, all partners have been aware of their roles and responsibilities.

#### **3.2. Project meetings**

One of the most important elements of steering a project group in a transnational project are the transnational project meetings; their professional preparation and implementation are crucial for project developments according to work plans, for achieving high quality products and for creating a positive working atmosphere of trust and a team work.

The promoter of the BALL project seems to be aware of the strategic and operative importance of transnational meetings, because all meetings are planned well in time with carefulness and high professionalism, as can be gathered from the agendas of the meetings

in Reykjavík, Iceland in September 2014, Alicante, Spain in January 2015 and the meeting in Lublin in Poland in May 2015. From the agenda it seems that all topics necessary at the various stages of a project were discussed and agreed by the partnership, contributions and presentations were equally divided between partners according to needs and competences and the contributions of all partners were treated with attention and respect; overall, the meetings also seem to be characterized by a very fine balance between work programme, dissemination activities and social activities.

Also the minutes of all the three meetings give the impression that the meetings were successful in terms of preparation and implementation work, management, target achievements and working atmosphere.

It is in fact a very positive element that full documentation of the single project meetings (agendas and materials) can be downloaded from the project website to give the wider public an insight into the concrete discussions and development processes.

### **3.2. Project phases**

Again, all written material from the project are extremely positive. They give the impression that a competent, experienced and ambitious partnership enjoys to work together in this project. At the same time, flexible and friendly management by the promoter; no major problems were reported and all minor inconveniences – as they happen in all transnational projects – got solved so far without any problems and to the full satisfaction of the partnership.

## **4. Dissemination Activities**

To disseminate an EU project in the first half of its lifetime is always quite a challenge for a project group and to evaluate its value for future purposes it is almost impossible. As long as main products are not finally developed they simply cannot get implemented properly. Thus, at this stage of the BALL project only dissemination activities and the reports that are available can be accessed, as is to be expected.

Concerning the dissemination activities: it has to be said that much of this already took place: First of all the mapping of the present situation, experiences and trends in preparations for retirement in these three countries have been established. Thus, key stakeholders

in all partner countries have been established.

The findings of the surveys in the three counties have been put forward. They need to be analyzed for recommendations and guidelines for preparation for retirement: the final product of the BALL project. Even though the findings of the survey reports are limited to the experiences and attitudes of rather homogeneous group of respondents and any generalization of the results should be made with utmost care, they are an important window to the attitudes, experiences and expectations of the third age. This group is a sample of well-educated individuals prepared to make their third age an asset and a source of opportunities. They are therefore an important reference group for the development of the recommendations the BALL project aims to provide at the end of the project.

The recommendations and guidelines developed in the BALL project should therefore possible be directed towards best practices in designing tools and activities.

Furthermore the BALL partner group have already implement a number of press and media appearances and the project partners have been very active in presenting the project in newspapers and magazines.

Besides these dissemination activities which are already quite impressive at this stage of the project development the project website [www.ball-project.eu](http://www.ball-project.eu) deserves special attention. It is really a quite ideal website for the target group presenting and showing all crucial information and project results for download.

During the second half of the project the dissemination activities should of course be intensified and developed towards making the value of the project into activities leading to sustainable use of the project outputs, which by nature will be supported by the concrete implementation of the pilot activities in the partner countries. In general, there is no doubt that the project group will be able to implement the dissemination and output in the planned quality and quantity to reach the set impact targets at the project end. For the final project evaluation the impact dimension will be subject to further evaluation.

## **5. Summary and Recommendations**

It appears that the BALL project is well on track: all products were so far developed in time and according to the quantitative and qualitative requirements of the project's proposal as well as of their final real life use; the project group is co-operating very well, there are no kind of indicators about dissatisfaction. All project meetings took place in time and seemed successful, also all other project processes seem to develop very smoothly; the coordinators i.e. those that have acted on behalf of Evris foundation is highly accepted by all partners, its management performance are characterized by high standard transparency, communication and information flow and work input and output; dissemination activities are sufficient in terms of quantity and quality, and they were carried out by all partners in all countries. This topic is worthwhile and gives both researchers and policy makers great material for use in the whole of Europe.

The future will be different in terms of how people in their third age will work, live and learn. The BALL project seems to take into consideration most of the factors that need to be analyze from this perspective.

Although the BALL project seems to be in very good condition, the following recommendations are made for the implementation of the second half of the project:

Dissemination activities should go hand in hand with the guidelines and learning outcomes activities. This goes especially for the pilot countries, where the partners in charge should make special efforts to reach outstanding dissemination activities. Besides this it, European-wide dissemination should also be attempted, along with linkage to other existing projects and networks in Europe in relation to the third age citizenship.

Finally, I wish the promoter and the entire group good luck and all the best for all further project developments.

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